

SALES ORDER PROCESSING

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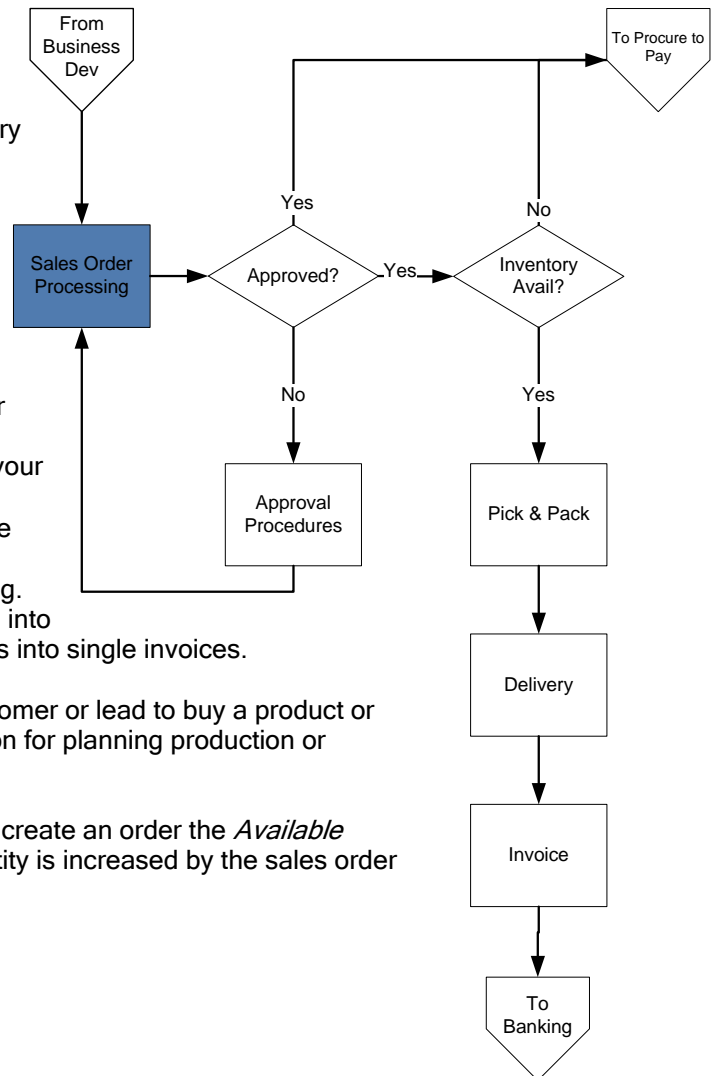
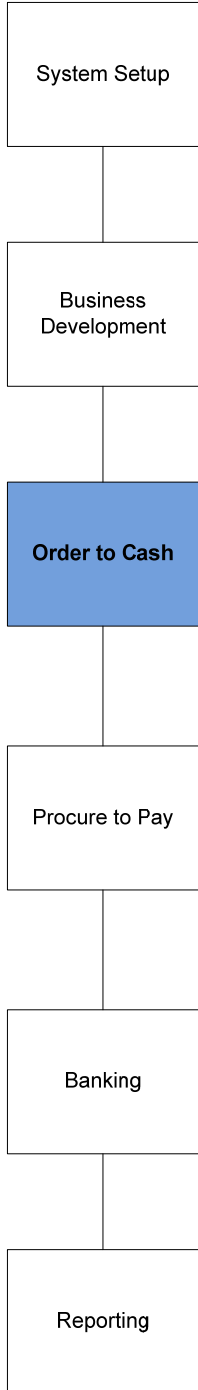
PROCESS FLOW

The sales process involves the quotation, order, delivery note, and A/R invoice documents. Quotes, sales orders and delivery notes are all optional processes in Business One; however each function plays an important part in the cycle.

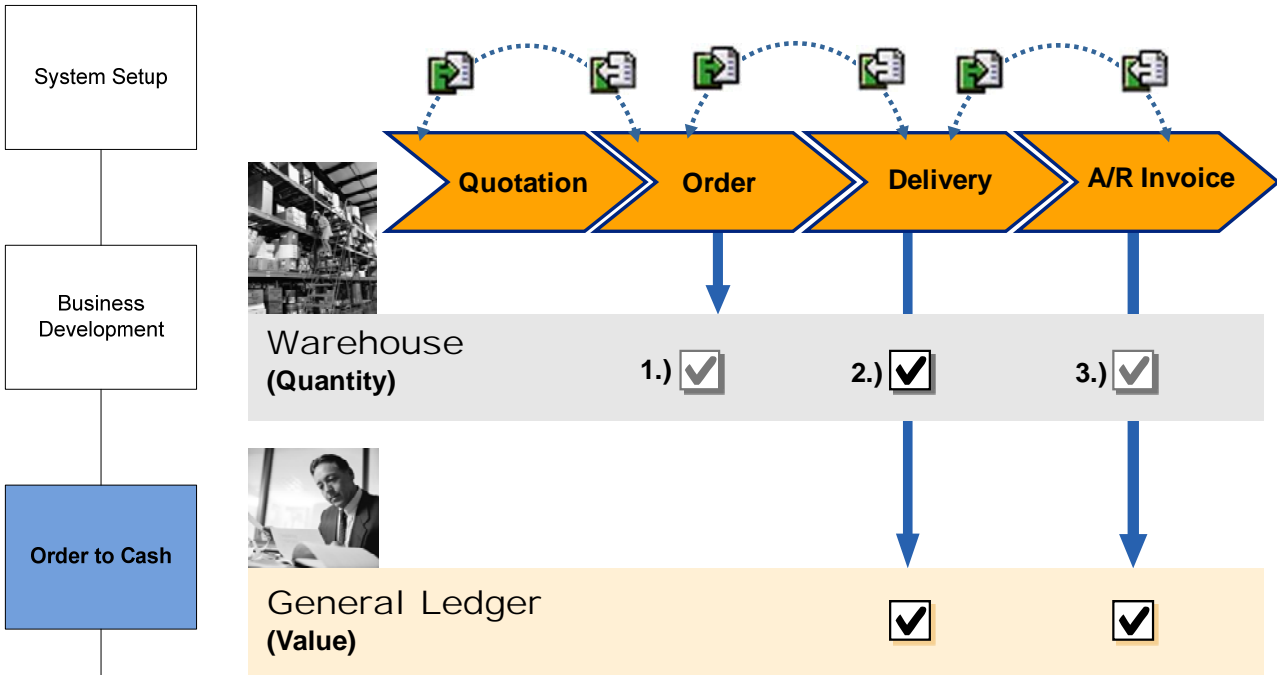
- Quotations allow you to forecast future sales based upon the historical success of your sales cycle.
- Sales Orders create demand on your inventory for procurement planning purposes and are used to schedule your delivery process.
- Delivery notes allow you to segregate business processes and record the delivery of the goods prior to invoicing. They allow you to consolidate orders into single deliveries or multiple deliveries into single invoices.

The sales order is a commitment from a customer or lead to buy a product or service. The document serves as a foundation for planning production or purchase orders.

As shown in the following graphic, when you create an order the *Available* quantity is reduced and the *Committed* quantity is increased by the sales order quantity.

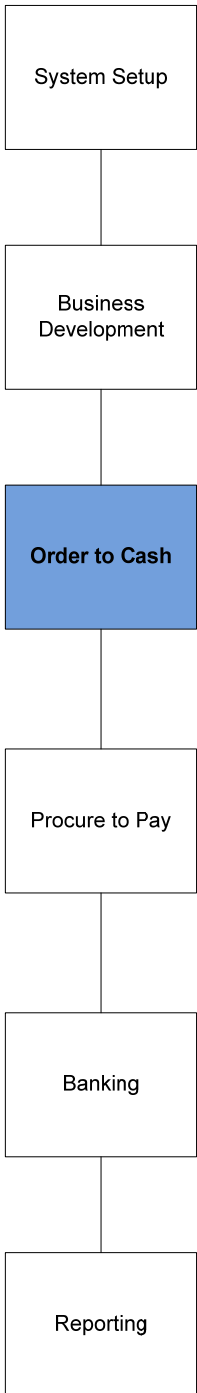


Document Flow in Sales



When you create a document, you can always refer to one or more documents that you created earlier (except for quotations). A sales order will remain open until you have transferred all the items to a follow-on document (Delivery or Invoice), or until you manually close or reverse them. The following graphic shows the various sales documents and their properties.

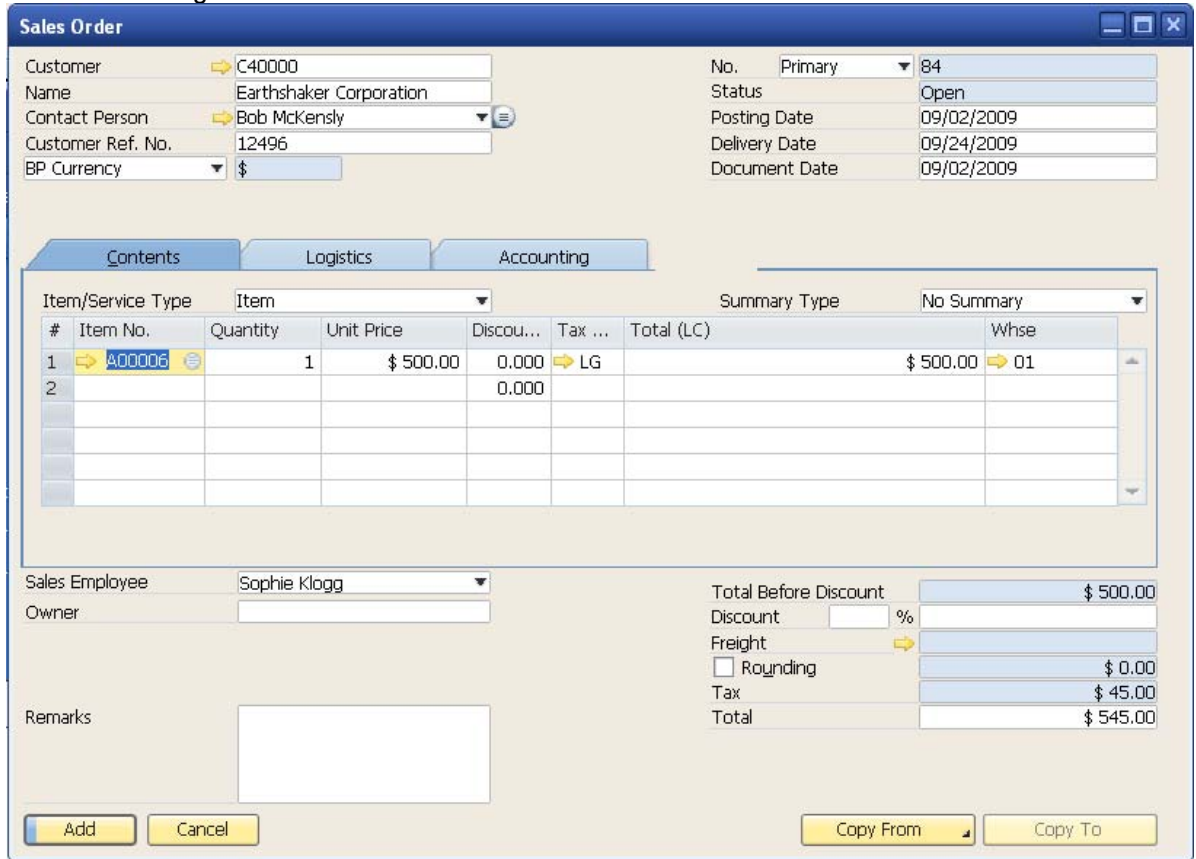
	Quotation	Order	Delivery	A/R Invoice
1.) Sales Document must be Created in the System				X
2.) Change/Reverse	X	X		
3.) Sales Document for Correction			Returns	A/R Credit Memo
4.) Reference When Added		Quotation	Order Quotation	Delivery Order Quotation
5.) Quantities Posted in Inventory Management		(X)	X (Goods Issue)	X (If No Reference to Delivery)
6.) Values Posted in General Ledger			X	X



SALES ORDER HEADER & FOOTER DEFINITIONS

1. Sales A/R -> Sales Order

The following information defines the fields in the main sales order screen.



Sales Order

Customer: C40000
 Name: Earthshaker Corporation
 Contact Person: Bob McKensly
 Customer Ref. No.: 12496
 BP Currency: \$

No.: Primary 84
 Status: Open
 Posting Date: 09/02/2009
 Delivery Date: 09/24/2009
 Document Date: 09/02/2009

#	Item No.	Quantity	Unit Price	Discou...	Tax ...	Total (LC)	Whse
1	A00006	1	\$ 500.00	0.000	LG	\$ 500.00	01
2				0.000			

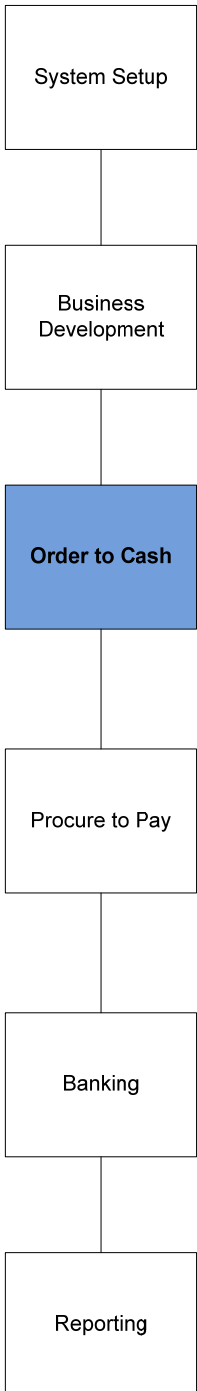
Sales Employee: Sophie Klogg
 Owner:
 Remarks:
 Total Before Discount: \$ 500.00
 Discount: %
 Freight:
 Rounding: \$ 0.00
 Tax: \$ 45.00
 Total: \$ 545.00

Buttons: Add, Cancel, Copy From, Copy To

Header Information

On the header area of the sales orders the customer and delivery date are required input fields. Other values will either default (BP Currency, Contact, Posting Date and Document Date etc.) or are not required (Customer Reference Number).

Field	Definition	Notes
Customer	The Business Partner Code is the unique key field that represents a Customer.	
Name	The customer name	
Customer Ref. No.	A customer reference number is often used for the customer PO number or other identifier supplied by the customer.	Optional



Field	Definition	Notes
No. 2. Step Status 2	The document number is defaulted based upon the numbering series.	Numbering series are used to segregate orders by division location or other business purpose. Manual numbers can also be used.
	The sales order status can be as follows: <ul style="list-style-type: none"> • Open - You can draw the document completely or partially to a document of a higher level. • Open – Printed - You printed the document and left it open. • Cancelled - You cancelled the document manually. • Closed - You closed the document manually or SAP Business One closed it automatically when you drew it to another document. • Draft - The document is a draft. • Unapproved - You cannot draw the sales order to a higher-level document 	
Posting Date	The date in which the document shows as posted to the GL.	The default value is the date on which the sales order is created. If you change this date, the continuity of the numbers and dates on a document is interrupted.
Delivery Date	Specify the date on which you deliver the goods and create the delivery document.	When you enter or modify the <i>Delivery Date</i> in the <i>General</i> area of the window, the date is copied to the <i>Delivery Date</i> for all the rows on the <i>Contents</i> tab, including new and existing items. Confirm the system message to copy the <i>Delivery Date</i> to the row level
Document Date	The document date of the sales order, which is used for tax purposes.	
Currency	Specifies the currency for the amounts in the sales order.	If the customer currency equals the local currency, the options are <i>Local Currency</i> and <i>System Currency</i> . If the customer currency is a foreign currency, the options include <i>BP Currency</i>

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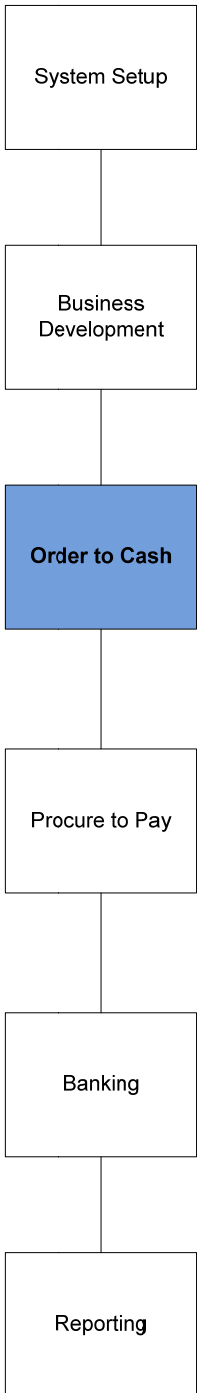
Reporting

Sales Employee	Sophie Klogg	Total Before Discount	\$ 500.00
Owner		Discount	%
Remarks		Freight	\$ 0.00
		<input type="checkbox"/> Rounding	\$ 45.00
		Tax	\$ 545.00
		Total	\$ 545.00


Footer Area

Field	Definition	Notes
Sales Employee	The sales employee who initiated the sales order	Defaults from the Sales Employee specified on the Business Partner
Owner	The code of the employee who owns the sales order	Used in "data ownership authorizations" for document based security.
Remarks	A free text field where you can enter additional information regarding the sales order.	If copied from a quotation, the quotation number will be referenced in this field. You also can edit the field content after the document is added.
Total Before Discount	Total amount of the sales order before the order discount is calculated.	If the discount has been defined in the item or service row, the amount displayed in this field takes that discount into account
Discount %	In the field on the left, enter the percentage of discount. The field on the right displays the amount of the discount.	When you update one field, the other field is updated respectively, so you can enter either an amount or a percentage.
Freight	Displays the total freight for the sales order	See details below.
Tax	Tax amount for the sales order calculated according to your tax definitions.	
Total	Total amount of the sales order including tax and discounts.	

CREATE SALES ORDER

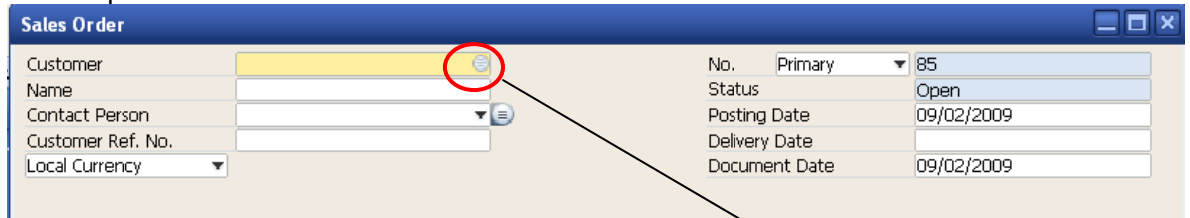


You can create a Sales Order document in two different ways


- Entering data directly into the sales order screen
- Copy the Sales Order from a Quote using the  button

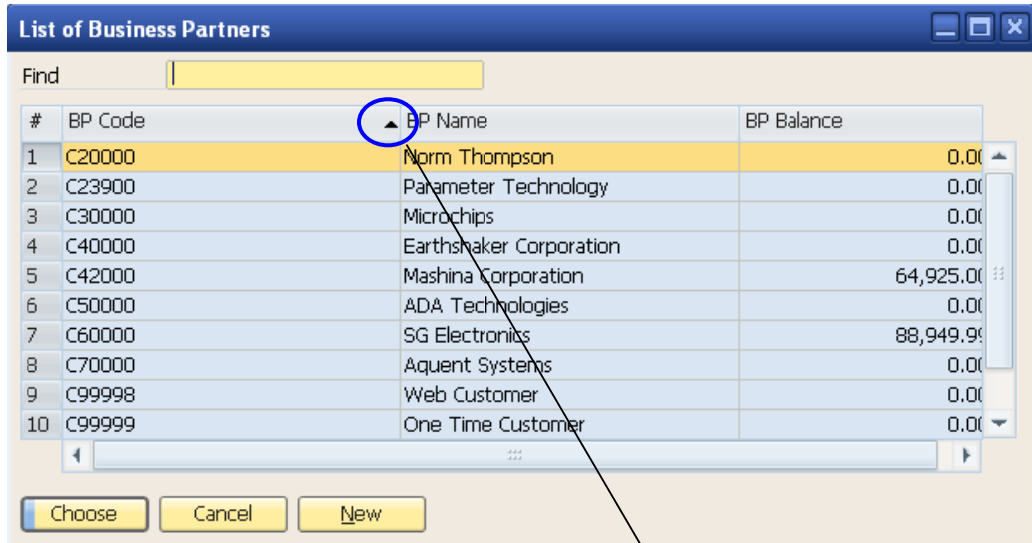
This procedure is for direct entry of the Sales Order without a quote.

- Complete the Header Section of the Sales Order




Customer		No.	Primary	85
Name		Status	Open	
Contact Person		Posting Date	09/02/2009	
Customer Ref. No.		Delivery Date		
Local Currency		Document Date	09/02/2009	

- You can enter either the customer code or name or use the  button to bring up the default list of Business Partners.

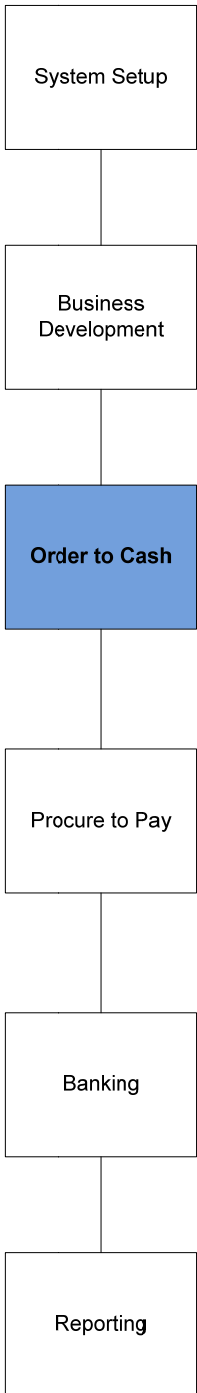


#	BP Code	BP Name	BP Balance
1	C20000	Norm Thompson	0.00
2	C23900	Parameter Technology	0.00
3	C30000	Microchips	0.00
4	C40000	Earthshaker Corporation	0.00
5	C42000	Mashina Corporation	64,925.00
6	C50000	ADA Technologies	0.00
7	C60000	SG Electronics	88,949.99
8	C70000	Aquent Systems	0.00
9	C99998	Web Customer	0.00
10	C99999	One Time Customer	0.00



You can highlight a customer by scrolling or by typing in the find field. Note that the find field is going to look based upon the column that is currently being used for the sorting. This is designated by the up arrow  in the blue circle above. You can double click on any column header to change the sort to that field.

- The system will default the primary contact into the Contact field. You can choose any Customer contact in the Business Partner master file.
- Enter a customer reference if one exists
- The Posting Date and Document Date will default from the system date.
- Enter the customer requested Delivery Date



- Enter information into the Content Section of the Sales Order:

Use this tab to specify items or services to be sold.

Item/Service Type		Item						Summary Type	No Summary
#	Item No.	Quantity	Unit Price	Discou...	Tax ...	Total (LC)	Whse		
1	A00006	1	\$ 500.00	0.000	LG		\$ 500.00	01	
2				0.000					

Item/Service Type

Sales Orders can be one of the following options:

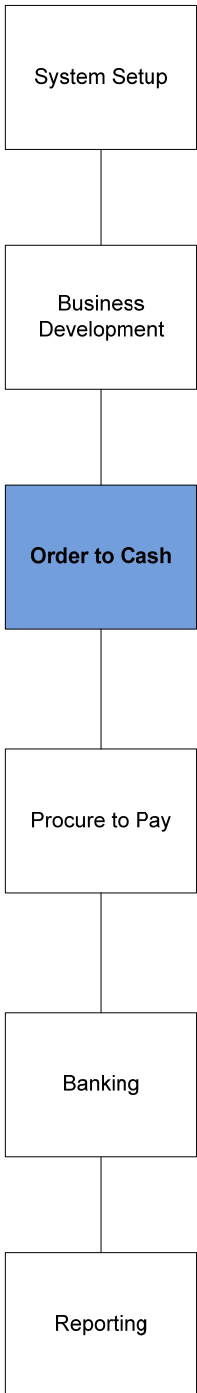
- *Item* - to create a purchasing document for items defined in the *Inventory* module.
- *Service* - to create a purchasing document for a service, such as a one-time consultation, that has not been defined as an *Item* in SAP Business One.



Including both items and services in the same sales document is not possible. However, you can define the respective services as items in SAP Business One. You then can enter the related items and services in one document along with their respective prices and quantities. It is possible to run the usual sales analysis and reports on these services.



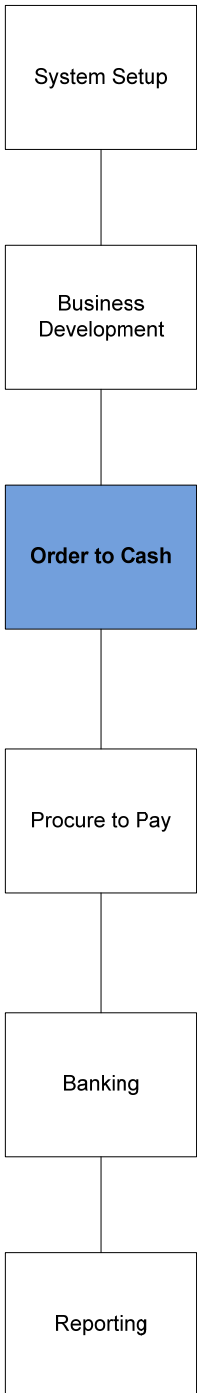
The contents tab contains a larger number of fields than those depicted in the screen above. The contents will also change based upon whether the invoice is Item or Service Type.



Contents		Logistics		Accounting			
Item/Service Type		Item		Summary Type			
				No Summary			
#	Item No.	Quantity	Unit Price	Discou...	Tax ...	Total (LC)	Whse
1	A00006	1	\$ 500.00	0.000	LG	\$ 500.00	01
2				0.000			

Item Contents

Field	Definition	Notes
Item No.		
Quantity	Quantity that the customer wants to order based on the item's sales unit of measure, as defined on the <i>Sales Data</i> tab in the <i>Item Master Data</i> window	The system will default 1 when the item is entered. The function of Unit of Measure is different in the core distribution and advanced warehousing versions of Business 1 Online. See Unit of Measure in the training manual.
Unit Price	Item price from the default price list, before a discount.	
Discount	Line item discounts can be included here as %	
Tax	Default tax code linked to the item; editable, if required.	
Total	Displays the total amount of the row in the relevant currency. The amount is calculated as follows: <i>Total = Unit Price x Quantity x Discount</i>	
Warehouse	The warehouse where the goods are to be shipped from.	

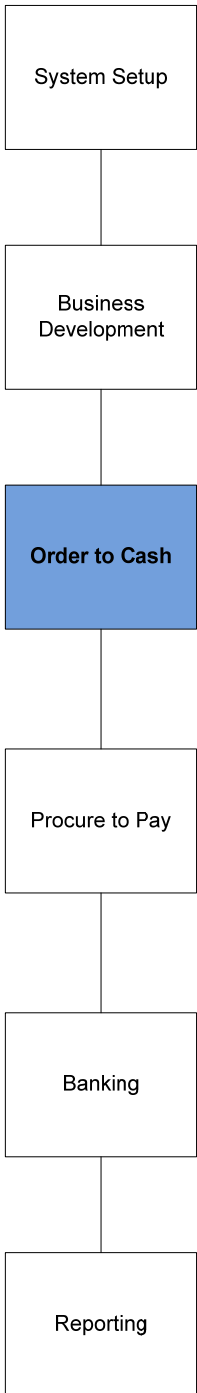


Contents		Logistics		Accounting	
Item/Service Type		Service		Summary Type	
				No Summary	
#	Description	G/L Account	Tax Code	Total (LC)	
1					

Service Contents

Field	Definition	Notes
Description	Free form text description of the service/charge.	
G/L Account	Specify the revenue or credit account to be charged when this order is invoiced.	Press TAB to display the <i>List of G/L Accounts</i> and choose one. The list displays general ledger accounts of the sales, expenditures, and other account types
Tax Code	Specify the tax code for the service.	
Total (LC)	The amount to be charged for the service.	

- Enter appropriate information in the Logistics Tab



Contents	Logistics	Accounting
Ship to Ship To <input type="text" value="208 Hollywood Ave"/> Los Gatos CA 95030 USA	Bill To Bill To <input type="text" value="208 Hollywood Ave"/> Los Gatos CA 95030 USA	<input type="checkbox"/> Print Picking Sheet <input type="checkbox"/> Purchase Orders <input checked="" type="checkbox"/> Approved <input checked="" type="checkbox"/> Allow Partial Delivery
Shipping Type <input type="text" value="Motor Express"/>	Pick and Pack Remarks <input type="text"/> BP Channel Name <input type="text"/> BP Channel Contact <input type="text"/>	

Field	Definition	Notes
Ship To	The customer's ship-to address as defined in the business partner master data. If required, change the address.	To change an address component, click the address field. The system updates the address only for this marketing document; it does not affect the business partner master data
Bill To	The customer bill-to address defined in the business partner master data; change, if required	To change an address component, click the address field. The system updates the address only for this marketing document; it does not affect the business partner master data
Shipping Type	Default shipping type from the BP Master will be displayed; change, if required.	
Print Picking Sheet	When selected, this check box will activate the following options when you print the <i>Sales Order</i> <ul style="list-style-type: none"> Order Only Pick List Only Order and Pick List 	If you do not select the box, only the sales order will print when printing the document.
Purchase Orders	Select this option to create purchase orders for the items that appear in the sales order automatically. This opens the <i>Purchase Order Confirmation</i> window once you add the sales order.	See Purchase Order Confirmation Window in the training manual
Approved	Enables copying the sales order to a higher level sales document	
Allow Partial Delivery	Allows partial delivery of the sales order.	If you select the checkbox, you can partially copy the sales order to a higher level sales document.
Pick & Pack Remarks	The contents of this field will appear in the pick and pack documents.	

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Field	Definition	Notes
BP Channel Name	If you are creating this document for an indirect sale achieved through another business partner, specify the code of that business partner	
BP Channel Contact	The system will display the default contact person of the BP Channel, as defined in the business partner master data; change, if required	

- Review and edit information in Accounting Tab as required.

Contents	Logistics	Accounting
Journal Remark	Sales Orders - C40000	BP Project <input type="text"/>
		Cancellation Date 10/24/2009
		Required Date 09/24/2009
Payment Terms	2P10Net30	Indicator <input type="text"/>
Payment Method	Incoming BT 02	Federal Tax ID US65-900637
Central Bank Ind.	<input type="text"/>	Order Number <input type="text"/>
	0 Months + 30 Days	

Field	Definition	Notes
Journal Remark	By default, displays Sales Order - XXX, where XXX is the customer code.	This will only be generated after saving. As no journal entry is created
Payment Terms	By default displays the payment terms for the customer as defined in the business partner master data. If required, specify different payment terms	Payment terms are also tied to default price lists in Business One. See separate training on Price Lists
Payment Method	Specify the payment method for the customer as defined in the business partner master data.	In B1Online this default should be IncomingCheck.
BP Project	A project may be linked to a Business Partner or assigned to the particular sales order.	By default displays the project name linked to the customer in the business partner master data. If required, specify a different project name
Cancellation Date	Specify the last date on which the customer accepts the goods. The default value is 30 days after the <i>Delivery Date</i>	
Required Date	Specify the expected date on which the goods will be delivered to the customer. The default value is the <i>Delivery Date</i>	

- When the contents, logistics and accounting tabs are complete you can review the footer information on the order.

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Sales Employee	Sales Manager	Total Before Discount	\$ 525.00
Owner		Discount	%
Remarks		Freight	→
		<input type="checkbox"/> Rounding	\$ 0.00
		Tax	
		Total	\$ 525.00

Review the sales totals for accuracy. At this point you can add additional remarks if desired in the Remarks box and press to record the order in the system

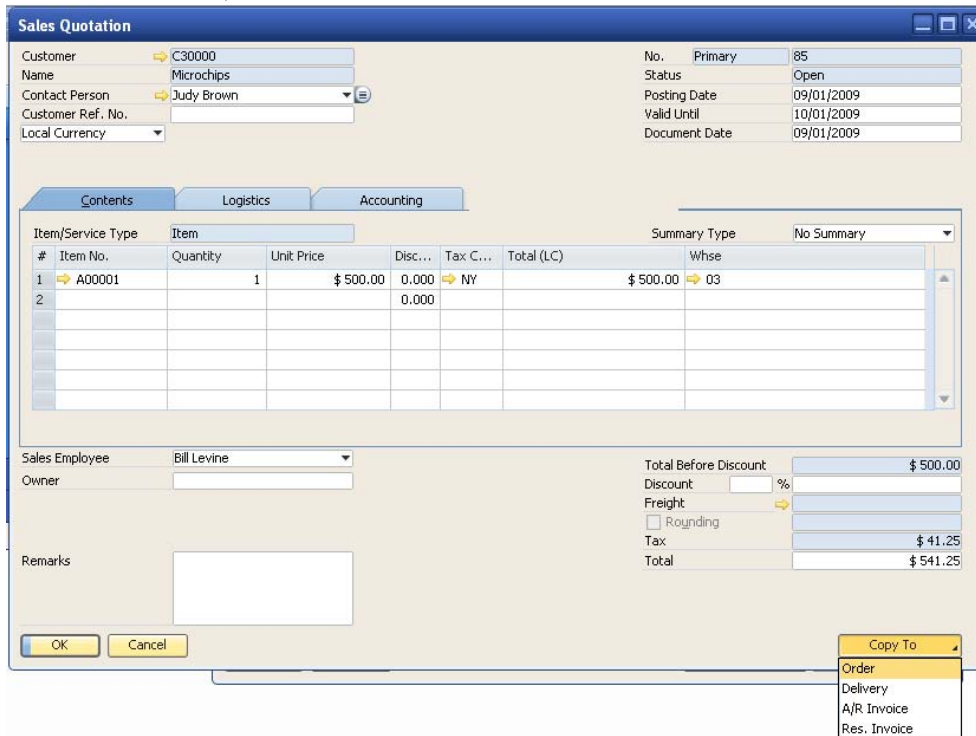
CREATE SALES ORDER FROM QUOTE

There are two ways to create a sales order from a quote:

- Push the order from the quote to the sales order
- Draw or Pull the order to the sales order from a quote

PUSH THE ORDER FROM THE QUOTE TO THE SALES ORDER

1. To Push the sales order from a quotation, open the quotation you want to convert from Sales A/R -> Sales Quotation



#	Item No.	Quantity	Unit Price	Disc...	Tax C...	Total (LC)	Whse
1	A00001	1	\$ 500.00	0.000	NY	\$ 500.00	03
2				0.000			

Summary Type: No Summary

Total Before Discount: \$ 500.00
 Discount: %
 Freight: \$
 Tax: \$ 41.25
 Total: \$ 541.25

Copy To dropdown options:
 Order
 Delivery
 A/R Invoice
 Res. Invoice

2. Select Order form the button.
3. The Sales Order will automatically appear with all the information from the quotation.

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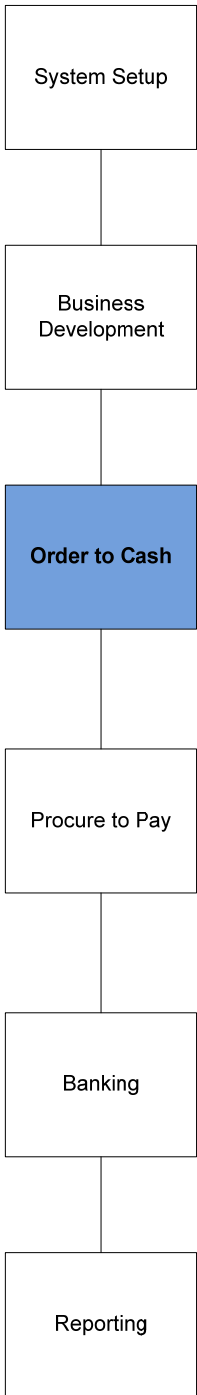
Sales Order

Customer	→ C30000	No.	Primary	85
Name	Microchips	Status	Open	
Contact Person	→ Judy Brown	Posting Date	09/17/2009	
Customer Ref. No.		Delivery Date		
Local Currency		Document Date	09/17/2009	

Contents		Logistics		Accounting			
Item/Service Type	Item	Summary Type	No Summary				
#	Item No.	Quantity	Unit Price	Disco...	Tax C...	Total (LC)	Whse
1	→ A00001	1	\$ 500.00	0.000	→ NY	\$ 500.00	→ 03
2				0.000			

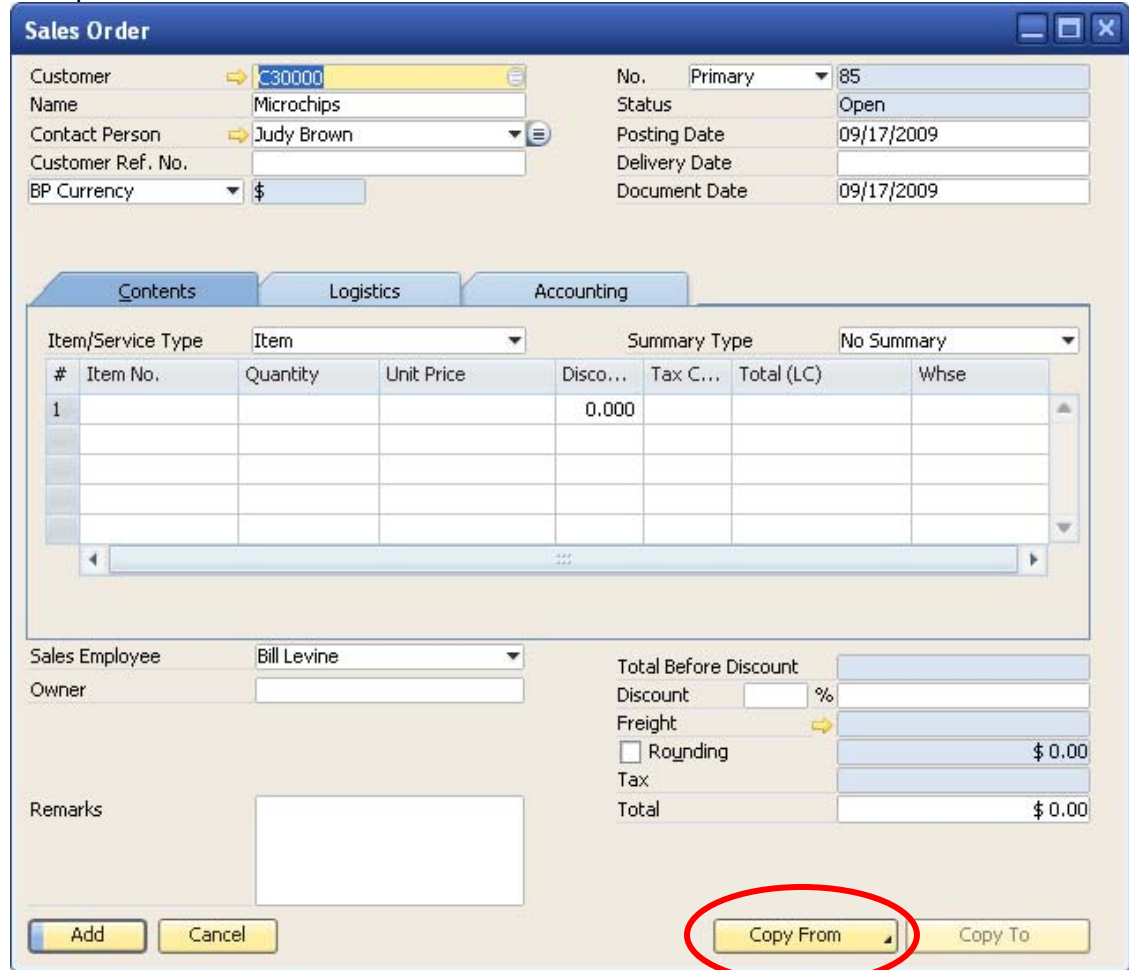
Sales Employee	Bill Levine	Total Before Discount	\$ 500.00
Owner		Discount	%
Remarks	Based On Sales Quotations 85.	Freight	→
		<input type="checkbox"/> Rounding	\$ 0.00
		Tax	\$ 41.25
		Total	\$ 541.25

Add
Cancel
Copy From
Copy To



DRAW OR PULL THE ORDER TO THE SALES ORDER FROM A QUOTE

1. Open a Sales Order Form from Sales - A/R -> Sales Order



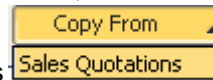
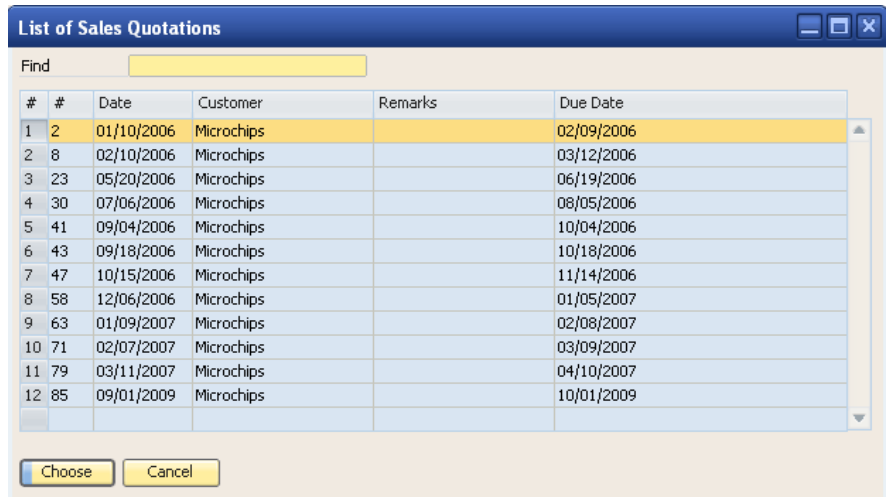
#	Item No.	Quantity	Unit Price	Disco...	Tax C...	Total (LC)	Whse
1				0.000			

2. Select the Customer for who the order is being placed.

3. Select the Copy From Button and choose Sales Quotations

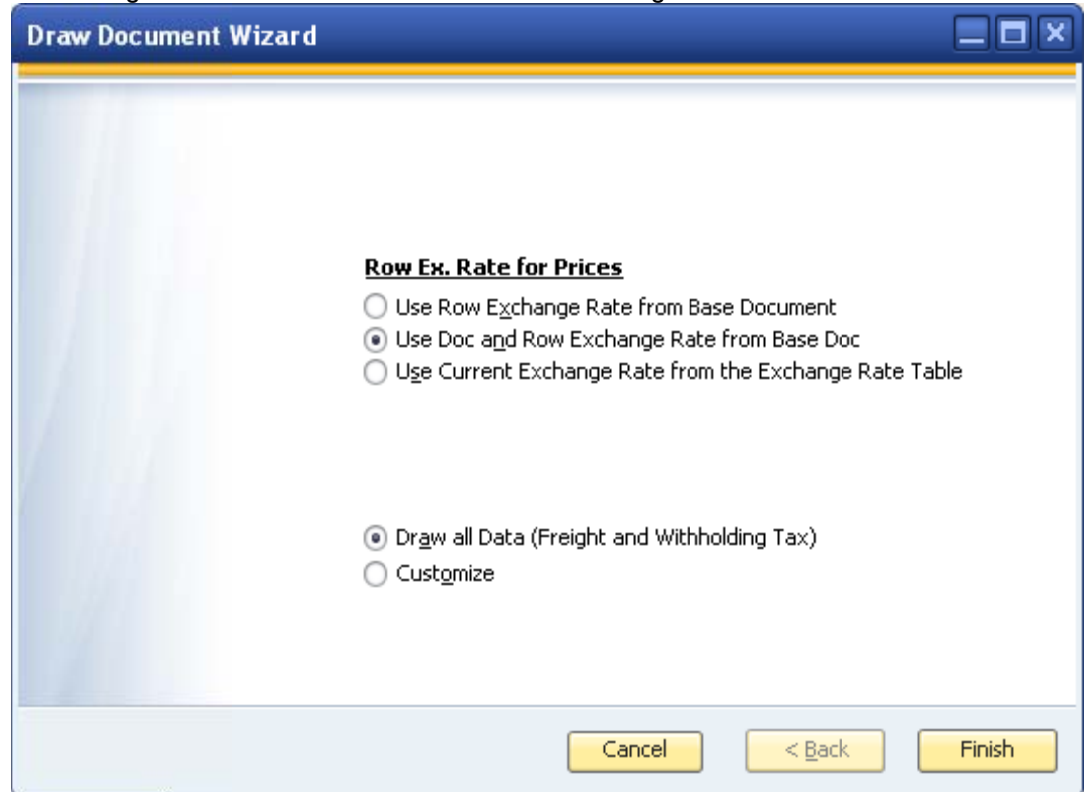
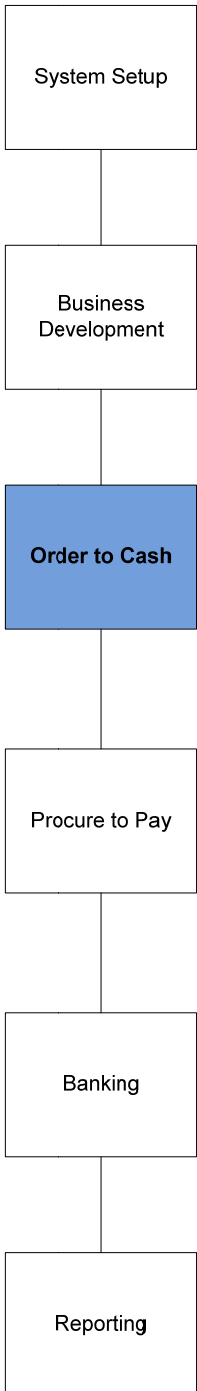
4. A listing of Sales Quotations will appear for that Customer

Highlight one or more of the quotations you would like to copy to the sales order

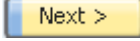
#	#	Date	Customer	Remarks	Due Date
1	2	01/10/2006	Microchips		02/09/2006
2	8	02/10/2006	Microchips		03/12/2006
3	23	05/20/2006	Microchips		06/19/2006
4	30	07/06/2006	Microchips		08/05/2006
5	41	09/04/2006	Microchips		10/04/2006
6	43	09/18/2006	Microchips		10/18/2006
7	47	10/15/2006	Microchips		11/14/2006
8	58	12/06/2006	Microchips		01/05/2007
9	63	01/09/2007	Microchips		02/08/2007
10	71	02/07/2007	Microchips		03/09/2007
11	79	03/11/2007	Microchips		04/10/2007
12	85	09/01/2009	Microchips		10/01/2009

- The Draw Document Wizard will lead you through the process of creating the order from the quotation(s). It provides different options for customization and for altering data based on the target document you are creating and the source document you are using. For example, you can choose which exchange rate to apply or whether to also draw freight charges and withholding tax values from a base document to the target document



The first option is only applicable if you use multiple currencies.

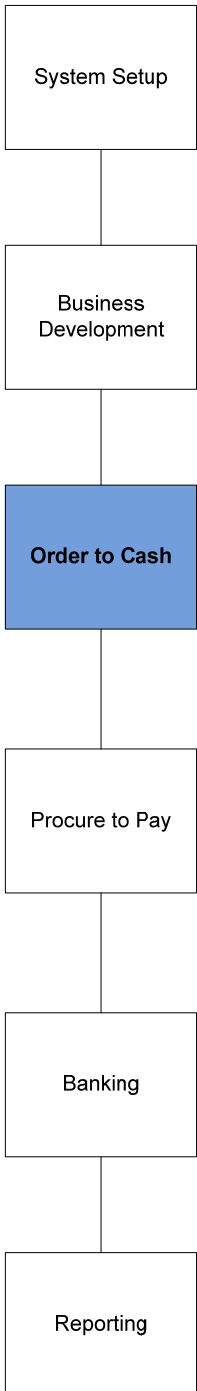
You also have the option to Draw All Data (including freight and tax) or Customize the copy.

Make your selections and select the  button



Customize is most frequently used when you want to select some of the lines on the quotation but not all of the lines and/or when you have multiple quotations being copied. See example below

If you customize an interim screen will come up as shown below:




Draw Document Wizard

Select Item To Copy

Display BP Catalog No.

#	Base Document	Item No.	Item Description	Qty	Unit Price	Disc...	Total
11	⇒ 30	⇒ C00007	Hard Disk Seagate 4	15	\$ 625.00	0.000	\$ 9,375.00
12	⇒ 30	⇒ A00003	IBM Infoprint 1226	10	\$ 375.00	0.000	\$ 3,750.00
13	⇒ 30	⇒ C00005	WLAN Card	15	\$ 75.00	0.000	\$ 1,125.00
14	⇒ 30	⇒ B10000	Printer Label	50	\$ 1.25	0.000	\$ 62.50
15	⇒ 30	⇒ LM4029MC	Memory Chip	5	\$ 62.50	0.000	\$ 312.50
16	⇒ 30	⇒ P10001	PC - P4 2.4G, DDR 5	5	\$ 1,800.00	0.000	\$ 9,000.00
17	⇒ 41	⇒ A00001	IBM Infoprint 1312	5	\$ 500.00	0.000	\$ 2,500.00
18	⇒ 41	⇒ A00003	IBM Infoprint 1226	5	\$ 375.00	0.000	\$ 1,875.00
19	⇒ 41	⇒ A00005	HP Color Laser Jet 4	5	\$ 500.00	0.000	\$ 2,500.00
20	⇒ 41	⇒ B10000	Printer Label	50	\$ 1.25	0.000	\$ 62.50
21	⇒ 41	⇒ LM4029MC	Memory Chip	5	\$ 62.50	0.000	\$ 312.50
22	⇒ 43	⇒ A00002	IBM Infoprint 1222	6	\$ 250.00	0.000	\$ 1,500.00
23	⇒ 43	⇒ P10001	PC - P4 2.4G, DDR 5	2	\$ 1,800.00	0.000	\$ 3,600.00
24	⇒ 43	⇒ P10003	PC Set 1	2	\$ 2,175.00	0.000	\$ 4,350.00
25	⇒ 47	⇒ A00003	IBM Infoprint 1226	8	\$ 375.00	0.000	\$ 3,000.00

You may select the lines individually or in bulk with normal SAP selection methods. Note that multiple copies of Item A00003 were selected.

When you select the  button the sales order will be created in Add Mode,

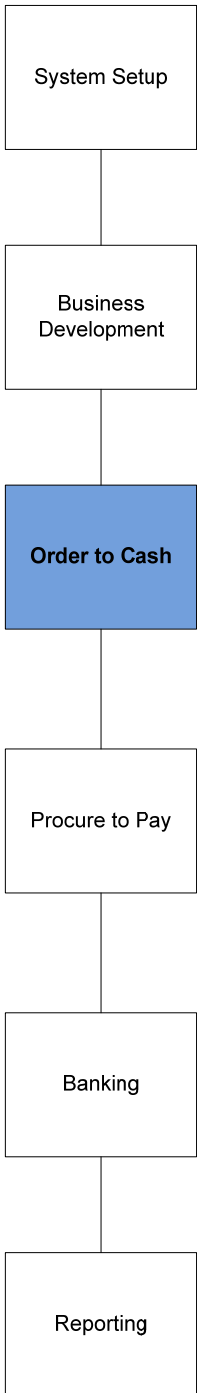
6. When you have multiple lines with the same item you have the choice of summarization.

Summary Type No Summary ▼

Sales orders can be summarized as follows:

- *No Summary* - the default value for this field.
- *By Documents* - summarizes rows with the same base documents (Quote) into one row that displays the base document number and reference. If an item appears in the table more than once and has the same price and description each time, it will be summarized to one row. This option is available only for documents of the type *Item* and when you copy rows from base documents.
- *By Items* - summarizes several item rows with the same item into one row. However, this is possible only when these item rows have the same parameters (for example, price, description, and warehouse). This option is available only for documents of the type *Item*

If you choose to summarize the display of the screen and the print options will change:



Sales Order

Customer: C30000, Name: Microchips, Contact Person: Judy Brown, Customer Ref. No.: , Local Currency: , No.: Primary 85, Status: Open, Posting Date: 09/17/2009, Delivery Date: , Document Date: 09/17/2009

Contents | Logistics | Accounting

#	Item No.	Quantity	Unit Price	Disco...	Tax C...	Total (LC)	Whse
1	A00006	5	\$ 500.00	0.000	NY	\$ 2,500.00	01
2	A00006	5	\$ 500.00	0.000	NY	\$ 2,500.00	01
3	A00003	10	\$				
4	B10000	200					
5	A00003	5	\$				

OEC Computers
1901 Maynesboro Drive
Suite 200
New York NY 19065
USA(610) 768-7465

SOLD TO
Microchips
45th Street
Suite 100
New York NY 10010
USA

SHIP TO
Ship To
5th Ave
New York NY 10005
USA

Remarks: Based On Sales Quotations 30, 41, 47.

Add Cancel

With no summary the order displays in the default view and each line of the order will print on the order.

SHIP VARE	DATE	SALES ORD. NO.	CANCEL DATE	CUST. NO.
1		85		C30000

SALES ORDER

SHIP TO

Ship To
5th Ave
New York NY 10005
USA

ORDER DATE	PURCHASE ORDER NO.	SHIP VIA	F.O.B.	TERMS
09/17/2009		UPS Red		2P10Net30
BUYER	DATE REQUESTED	LOCATION	SALESPERSON	TERRITORY
Judy Brown			Bill Levine	
ITEM NO.	DESCRIPTION	QTY ORDER	UNIT PRICE	EXTENSION
A00006	HP 600 Series Inc	5.000	\$ 500.00	\$ 2,500.00
A00006	HP 600 Series Inc	5.000	\$ 500.00	\$ 2,500.00
A00003	IBM Infoprint 1226	10.000	\$ 375.00	\$ 3,750.00
B10000	Printer Label	200.000	\$ 1.25	\$ 250.00

When Summarized the appearance of the screen changes to denote the summarization and individual lines cannot be edited as each line maintains its original attributes.

The sales order will also print in a summarized fashion.

Sales Order

Customer: C30000, Name: Microchips, Contact Person: Judy Brown, Customer Ref. No.: , Local Currency: , No.: Primary 85, Status: Open, Posting Date: 09/17/2009, Delivery Date: , Document Date: 09/17/2009

Contents | Logistics | Accounting

Summary Type: **By Items**

#	Item No.	Item Description	Quantity	Delivered Qty	Unit Price	Disc...
1	A00006	HP 600 Series Inc	10		\$ 500.00	0.000
2	A00003	IBM Infoprint 1226	23		\$ 375.00	0.000
					\$ 1.25	0.000
					\$ 500.00	0.000
					\$ 62.50	0.000

OEC Computers
1901 Maynesboro Drive
Suite 200
New York NY 19065
USA(610) 768-7465

SOLD TO
Microchips
45th Street
Suite 100
New York NY 10010
USA

SHIP TO
Ship To
5th Ave
New York NY 10005
USA

SHIP VARE	DATE	SALES ORD. NO.	CANCEL DATE	CUST. NO.
1		85		C30000

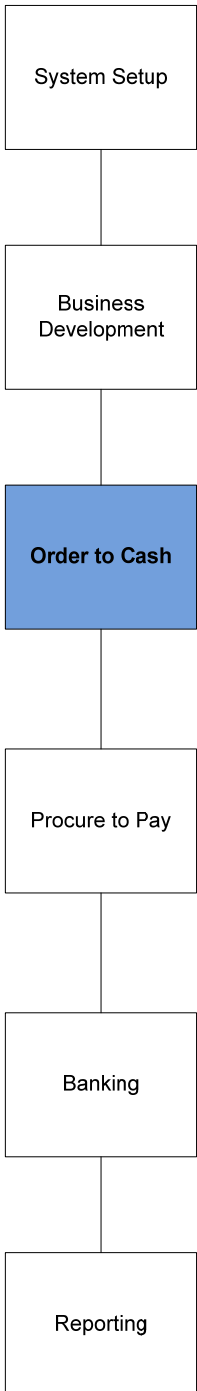
SALES ORDER

SHIP TO
Ship To
5th Ave
New York NY 10005
USA

ORDER DATE	PURCHASE ORDER NO.	SHIP VIA	F.O.B.	TERMS
09/17/2009		UPS Red		2P10Net30
BUYER	DATE REQUESTED	LOCATION	SALESPERSON	TERRITORY
Judy Brown			Bill Levine	
ITEM NO.	DESCRIPTION	QTY ORDER	UNIT PRICE	EXTENSION
A00006	HP 600 Series Inc	10.000	\$ 500.00	\$ 5,000.00
A00003	IBM Infoprint 1226	23.000	\$ 375.00	\$ 8,625.00
B10000	Printer Label	250.000	\$ 1.25	\$ 312.50

SALES ORDER PROCESSING FUNCTIONS

Your SAP Business One system has several functions to enhance the sales process as shown below.



	Quotation	Order	Delivery	A/R Invoice
1.) Credit Limit Check		X	X	X
2.) Gross Profit and Last Prices Report	X	X	X	X
3.) Link to Transaction Journal			(X)	X
4.) Serial Number and Batch Management		(X)	X	X
5.) Activities	X	X	X	X
6.) Create Document Drafts	X	X	X	X