

How to Create Sales Order with UOM Conversion

The video will show the user how to Create Sales Order with UOM Conversion

Navigate to Sales, Sales Order, New Entry.
Fill in document date, customer, and delivery location.
Click Confirm and Approve.

STEP-BY-STEP:

1. Go to Sales menu
2. Select Sales Order
3. Click Create New.
4. Fill in the header info, i.e. document date, customer to send the invoice to, deliver to and location, delivery date.
(mandatory fields in red color or marked with red x)
5. Choose "After Delivery" in the Invoice Rule type.
Auto UOM Conversion can only be processed for this type of Invoice Rule.
6. Click Save button
7. Add line items in the table below.
User can filter the products list by brand, by selecting a brand in the Product Brand drop down list.
Fill in the line info, i.e. Product, UOM, Qty, Unit Price, and Tax Rate.
Click + button or press ENTER to save the line entry.
8. Click Confirm Sales Order button when done editing, this will reserve the required stock to fulfill the order.
9. If UOM Conversion is required to fulfill the order, system will automatically prompted users with the list of SKUs and quantity that need to be converted.
Click Create UOM Conversion button to process the conversion.
A UOM Conversion document will be automatically created by the system and referenced to the related Sales Order document.
Verify the UOM Conversion header and line items data.
Confirm and Post the UOM Conversion document to

complete it.

Click the Sales Order document number link at the bottom to go back to the Sales Order document.

10. Click Confirm Sales Order button when done editing, this will reserve the required stock to fulfill the order.

11. Click Approve Sales Order button to approve the order.
