Sales Order (After Delivery Invoice Rules) to Good Delivery Process

The video will show the process: from how to create sales order to goods delivery when the invoice rule is “After Delivery “.

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
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 when done editing, this will reserve the required stock to fulfill the order. If there is a promotion that fulfill the conditions, a new line item will also be automatically added in the order.
9. Click Approve Sales Order button to approve the order.
10. In the Taxes tab, user can view the tax details for the order.
11. In the Reserved Stock tab, user can view the list of stock reserved for the order.
12. In the Applied Promotions tab, user can view the promotion that was applied for the order.
Users can view the Promotions details in the Sales –

Masters – Promotions.
13. Click on the Delivery Order link to view the Delivery Order in the Inventory module.
14. Click on Create Picking button. Click OK button in the creation dialog window.
15. Click Start Picking after verifying the picking lines.
16. Click Post Picking button to post the inventory for the outbound order.
17. Click on the Show Packing link to view the Packing document.
18. In the Products table, right click on a Packing line item to Assign to a Carton.
Choose the Carton Type and click OK button.
Repeat for all the remaining Packing line items.
User can put all the line items into the same carton.
19. In the Cartons table, right click on a line item to Close the Carton.
Repeat for all the remaining line items.
Users also can choose to assign the line items to a pallet instead.
20. Click Confirm Packing when done editing.
21. Click Complete Packing to complete the packing process.
22. Click on Create Goods Delivery button.
Click OK button in the creation dialog window.
23. Click Confirm Goods Delivery when done editing
24. Click Post To Accounts button to post the entries.
The stock status will be outbound in-transit for the warehouse, until the Sales Invoice for this order is posted.
25. Summary of the Sales Order with After Delivery Invoice Rules process: Sales Order – Delivery Order – Picking – Packing – Goods Delivery