


Mobile Sales – Create Sales Order

Mobile Sales – Create Sales Order allows user to create a sales order to place orders from customer from the web browser

Below actions are available under Mobile Solution **“Create Sales Order”**:

 Create new sales order; update, delete, print, and view sales order details

Note: User need to enable Cookies in their Internet Web Browser to be able to print / save the report



Field Name	Explanation	Mandatory Information
Document Date	Date of the sales order	Y
Document Number	Number of the sales order	Y
Reference Number	A unique number as reference for the sales order	N
Promised Date	The promised date to deliver the items / articles in the sales order	N
Customer	Company's customers	Y
Currency	Currency used by the customer	Y
Payment Term	Payment rules imposed by suppliers on their customers.	Y
Address	Delivery address for the sales order	Y
Description	Description	N
Items/Articles – # Product	Self-explanatory	Y
Items/Articles – Description	Description of product	Y
Items/Articles – Order Qty	Quantity of product ordered by customer	Y
Items/Articles – Qty	Quantity of product available for this sales order	Y

Items/Articles – Unit Price	Self-explanatory	Y
Items/Articles – Discount	Discount from the unit price	N
Total Amount	Total amount for the ordered product	Y
Total – Quantity	Self-explanation	Y
Total – Amount	Total amount of sales order before tax	Y
Total – Tax	Self-explanation	Y
Total – Grand Total	Total amount of sales order with tax	Y

Create New Sales Order

1. Click on **“Create New”** button at the top of screen if the sales order form is not empty, it will open **“Sales Order”** with empty form



2. Select a customer from **“Customer”** list, it will fill up the customer’s info on the form



3. Fill up the document information on top half of screen. Click **“Save”** button to save progress

4. Click **“Add Item”** button in the middle of the form, to add product to the sales order document, it will open **“Items / Articles Form”**



5. Select a product from **“Product”** list, it will fill up the product’s info on the form



6. Enter quantity to be ordered in **“Ordered Qty”** field, it will calculate the total price for the product ordered



7. Optional: Select an expense type from "**Expense Type**" list for the product ordered



8. Click "**Save/Create**" button to add more product to the sales order document. Click "**Save/Close**" button to add the product and go back to the sales order document



9. Click "**Confirm**" button at top of the screen to confirm the sales order document.

Note: Approval of sales order document can only be done using GOOMI application

10. Click "**Generate Similar**" button at top of the screen to generate new sales order document with the same information.

Confirm / Reopen Sales Order

1. Click on "**Confirm**" button at the top of screen to confirm a drafted sales order. The "**Confirm**" button will then be disabled to indicate the document has been confirmed.



2. User may reopen a sales order if the status is "**Confirmed**" or "**Approved**", by clicking "**Reopen**" button at the top of screen

Note: Approval of sales order document can only be done using GOOMI application


Delete Sales Order

1. Click on **“Delete”** button at the top of screen. If a sales order’s status is **“Confirmed”** or **“Approved”**, reopen the order first by clicking **“Reopen”** button at the top of screen



2. Click on **“OK”** button on the pop-up window to confirm sales order deletion

Print Sales Order Details (as PDF file)

1. Click on  button at top of screen of the selected order, it will open file dialog to save the sales order document as a pdf file

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2. Select a folder and file name to save the sales order document as pdf file

3. Open the pdf file and print

