Sales Order

Sales Order Overview

A **Sales Order** is a formal document issued by the seller to the buyer in response to a **Purchase Order**. It confirms the details of the transaction before goods are delivered.

A sales order typically includes:

- Buyer billing information
- Delivery details
- Product list and quantities
- Pricing, taxes, and discounts
- Payment terms and payment information
- Shipping charges (if applicable)
- Additional notes or instructions

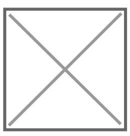
Once the buyer approves the sales order, the seller proceeds with shipping the goods.

Sales Order Statuses

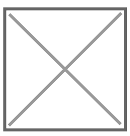
A sales order can have the following statuses:

- **Ordered** – Order has been created
- **Partial** – Order has been partially fulfilled
- **Completed** – Order has been fully processed Step-by-Step: Enabling Sales Orders

1. Go to **Settings**.
2. Select **Business Settings**.
3. Open the **Sales** tab.

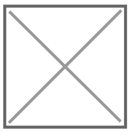


4. Enable **Sales Order**.
5. Click **Update Setting.**



Step-by-Step: Creating a Sales Order

1. Go to **Invoice** and click on **List POS.**
2. Click on **Sales Orders**.
3. Select **Add Sales Order**.

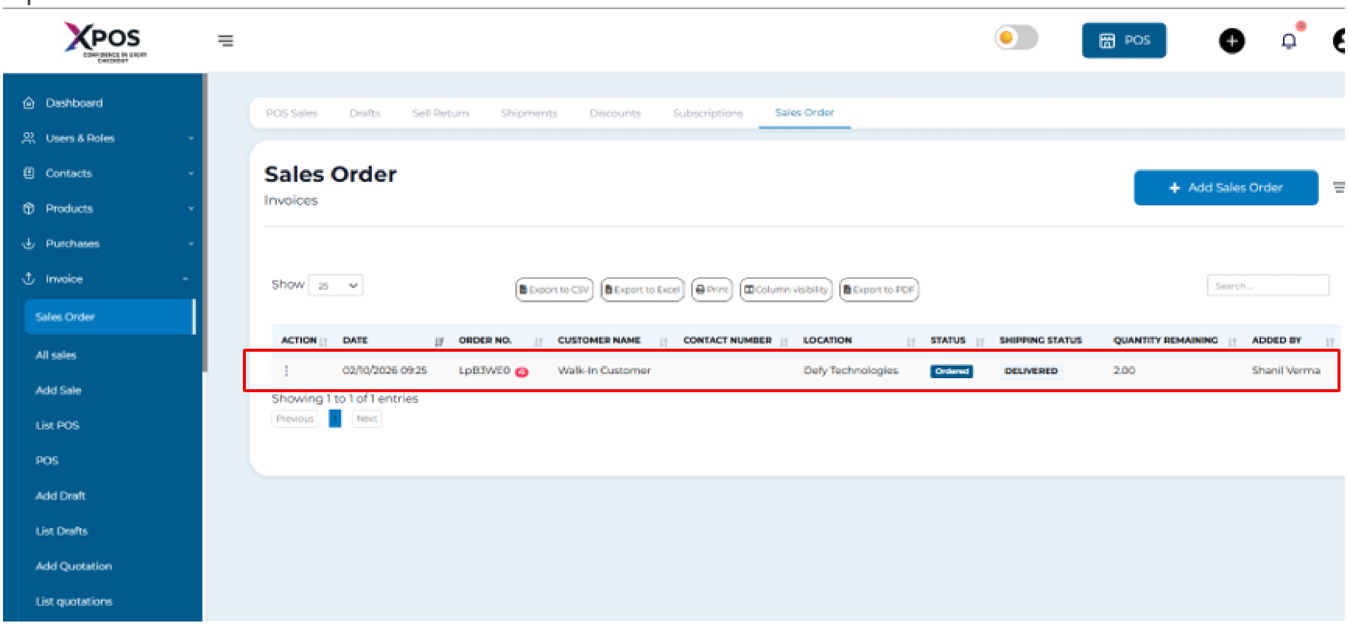


1. Enter all required details such as:
   - Customer information
   - Products and quantities
   - Pricing, tax, and discounts
   - Shipping Details
2. Click **Save**.

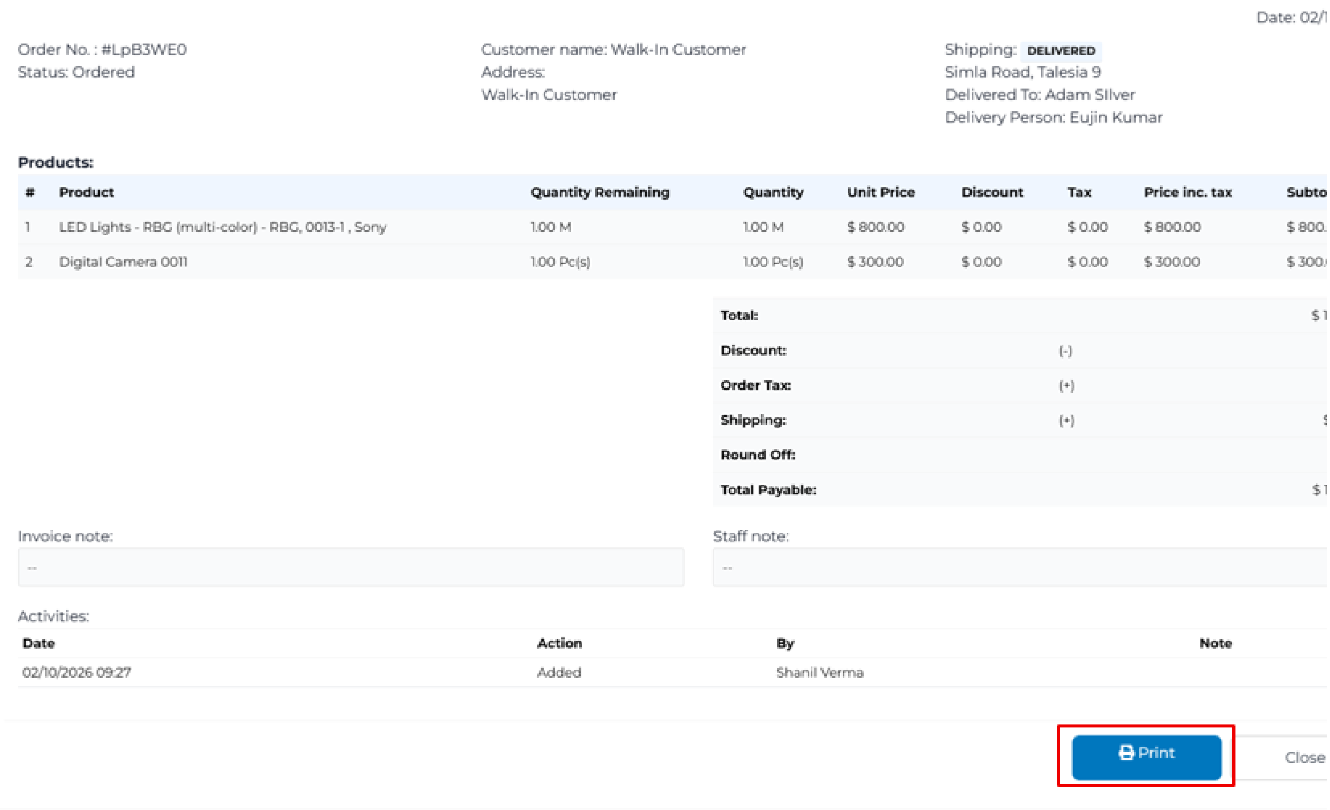
Note: Inventory is **not deducted** when a sales order is created.

Step-by-Step: Printing and Sharing a Sales Order

1. Open the created sales order.



2. Click **Print**.

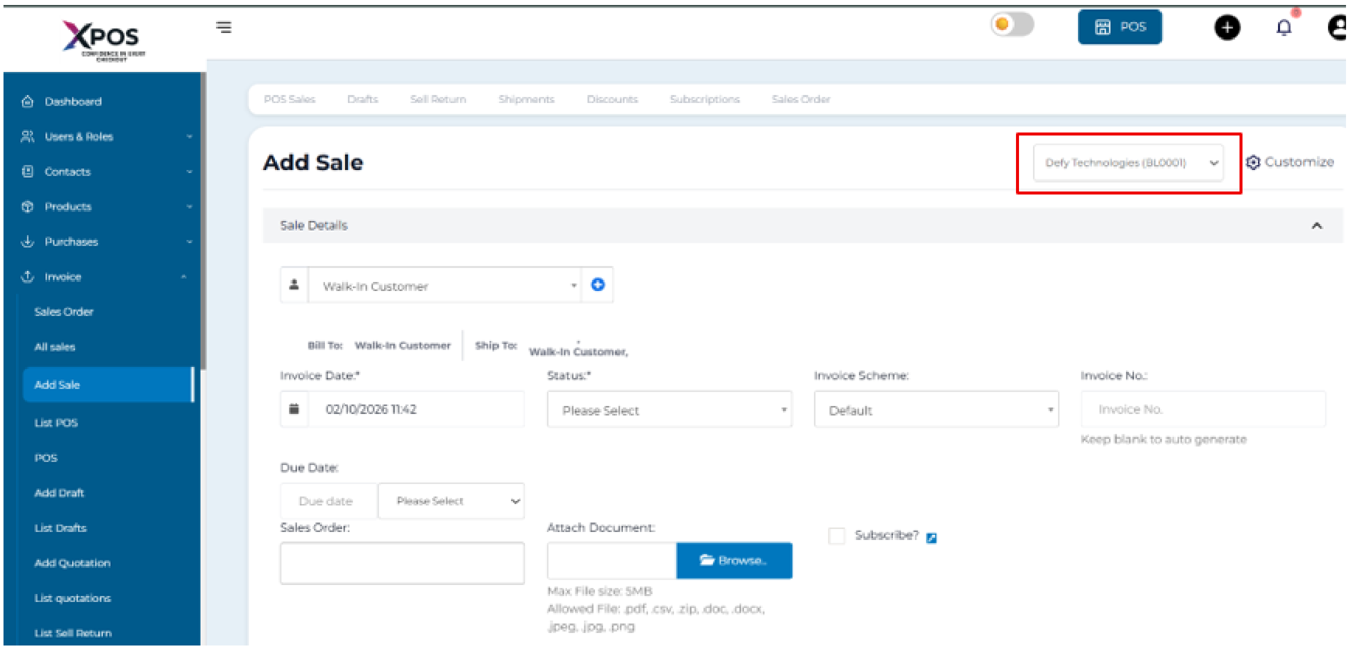


3. Share the printed or digital copy with the buyer for approval.

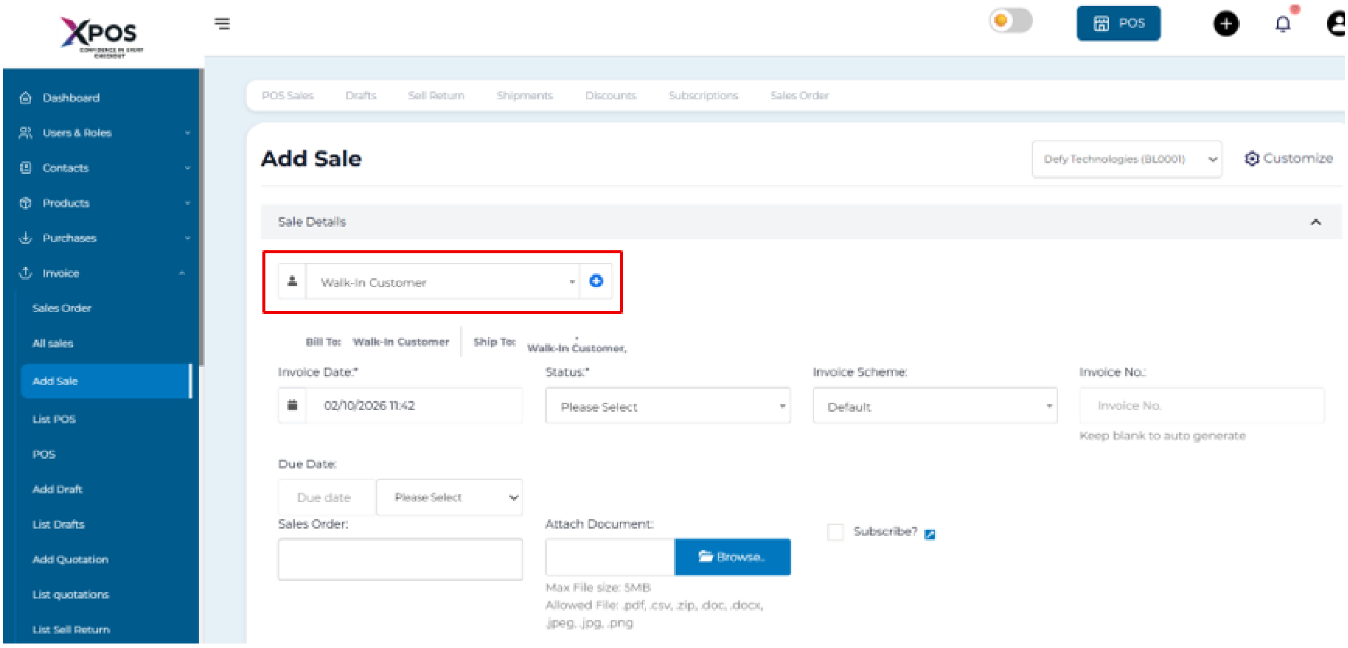
Step-by-Step: Converting a Sales Order to a Sale

Once the buyer approves the sales order, it can be converted into a sale.

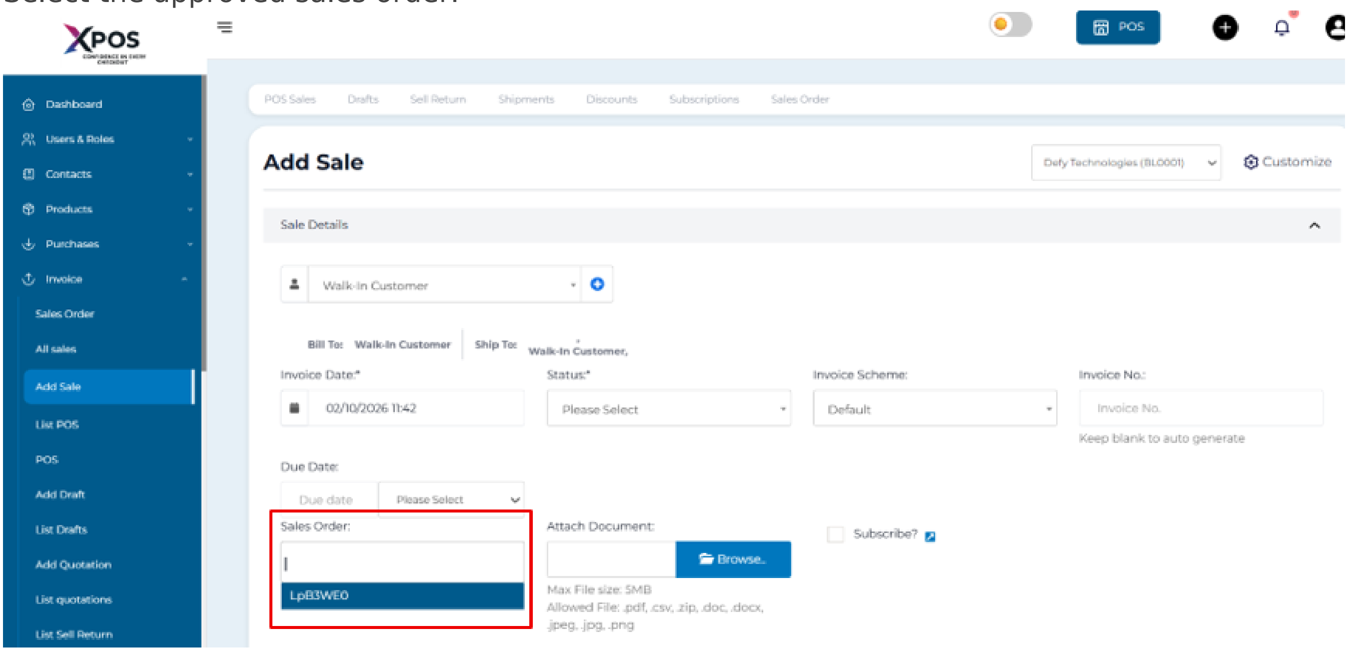
1. Go to **Invoice→ Add Sale**.
2. Select the **Business Location**.



3. Choose the **Customer**.



4. Open the **Sales Order** dropdown.
5. Select the approved sales order.



6. The system will automatically load:
   - Products
   - Prices
   - Taxes
   - Discounts
7. Adjust product quantities if needed.
8. Complete and save the sale.

Revision #3
Created 2026-01-31 04:23:37 UTC by Shanil Verma
Updated 2026-02-10 00:03:15 UTC by Eujin Kumar