

Amending a Sales Order

Part 1 – adding a new item

Items should only be added to orders if picking hasn't already commenced

Check with the person doing release sales order picking to confirm it is OK to add new items

Sales order (1 - pla) - Sales order: SO00110134, Fun Fantastic (Uk) Ltd

File Sales order Sell Manage Pick and pack Invoice Retail General

Service order Delete Cancel Edit From all From journal Totals Download online orders Generate from template Attachments Send payment failure email Email notification log Stock Availability

Sales order Purchase order Direct delivery New Maintain Show Copy View Commerce S... Attachments Email notification Stock

SO00110134 : FUNF01 - Fun Fantastic (UK) Ltd Open order

▶ Sales order header

Sales order lines

Add line Add lines Add products Remove Sales order line Financials Stock Product and supply Update line Kitting

Kit	Create a new record	Product name	Quantity	Unit	Unit price	Discount percent	Net amount	Requested ship date	Mode of delivery	Reference number	Hazardous	Haz by Sea	Weight	Created date and time
		PGS500 GeoBubble Sol+Guard 140 Solar Cover per sqm	32.00	Sqm	10.80	65.00	120.96	26/06/2018	42AM		<input type="checkbox"/>	<input type="checkbox"/>	15.36	19/06/2018 15:04:20
		FB50-IN Filter Cartridge Beachcomber C-4950 FC-2390M	1.00	Item	27.70	50.00	13.85	26/06/2018	42AM		<input type="checkbox"/>	<input type="checkbox"/>	0.76	19/06/2018 15:04:31

▶ Line details

Navigation icons: Description of the item. | (9) | GBP | USR Model | usr | pla | initial | | NUM | Admin | 20/06/2018 08:48 | AX2012DR | Close

Click Add line

Latest sales orders

Sales order	Status	Creati
SO00110134	Open order	19/C
SO00110007	Invoiced	12/C
SO00109957	Invoiced	12/C
SO00109924	Invoiced	12/C
SO00109891	Invoiced	12/C
...

Related information

Sales order (1 - pla) - Sales order: SO00110133, AA Pools

File Sales order Sell Manage Pick and pack Invoice Retail General

Service order Delete Edit Purchase order Cancel Header view Line view From all From journal Totals Download online orders Commerce S... Generate from template Attachments Attachments Send payment failure email Email notification log Stock Availability Email notification Stock

SO00110133 : AAP001 - AA Pools Open order

Latest sales orders

Sales order	Status	Creati
SO00110133	Open order	19/C
SO00090161	Invoiced	08/C
SO00090159	Invoiced	08/C
SO00087961	Invoiced	17/C
SO00087645	Invoiced	12/C
...

Related information

Sales order header

Sales order lines

Kit	Type	Item number	Product name	Quantity	Unit	Unit price	Discount percent	Net amount	Requested ship date	Mode of delivery	Reference number	Hazardous	Haz by Sea	Weight	Created date and time
	Type	BS500	GeoBubble Sol+Guard 140 Solar Cover per sqm	45.00	Sqm	10.80	60.00	194.40	22/06/2018	01		<input type="checkbox"/>	<input type="checkbox"/>	21.60	19/06/2018 09:40:41
		RCH110	6 X 1Kg Relax Small Chlorine Tabs	6.00	Box	90.00	60.00	216.00	19/06/2018	01		<input type="checkbox"/>	<input checked="" type="checkbox"/>	40.80	19/06/2018 09:50:26
		PLI330	30thou Patterned Liner per sqm	50.00	Sqm	34.06	60.00	681.20	25/06/2018	01		<input type="checkbox"/>	<input type="checkbox"/>	45.50	20/06/2018 07:52:49
								0.00	19/06/2018	01		<input type="checkbox"/>	<input type="checkbox"/>	0.00	00:00:00
		DELOS	Delivery Charge	1.00	Item	40.21		40.21	19/06/2018	01		<input type="checkbox"/>	<input type="checkbox"/>	0.00	19/06/2018 09:53:13

Enter new item number and then tab across to quantity and enter required amount

Line details

Item number in order line

NUM Admin 20/06/2018 08:55 AX2012DR

Sales order (1 - pla) - Sales order: SO00110133, AA Pools

File Sales order Sell Manage Pick and pack Invoice Retail General

Service order Purchase order Direct delivery Edit Delete Cancel Header view Line view From all From journal Totals Download online orders Generate from template Attachments Attachments Send payment failure email Email notification log Stock Availability

SO00110133 : AAP001 - AA Pools Open order

Latest sales orders

Sales order	Status	Creati
SO00110133	Open order	19/C
SO00090161	Invoiced	08/C
SO00090159	Invoiced	08/C
SO00087961	Invoiced	17/C
SO00087645	Invoiced	12/C
...

Related information

▶ Sales order header

Sales order lines

Kit	Type	Item number	Product name	Quantity	Unit	Unit price	Discount percent	Net amount	Requested ship date	Mode of delivery	Reference number	Hazardous	Haz by Sea	Weight	Created date and time
		PGS500	GeoBubble Sol+ Guard 140 Solar Cover per sqm	45.00	Sqm	10.80	60.00	194.40	22/06/2018	01		<input type="checkbox"/>	<input type="checkbox"/>	21.60	19/06/2018 09:40:41
		RCH110	6 X 1Kg Relax Small Chlorine Tabs	6.00	Box	90.00	60.00	216.00	19/06/2018	01		<input type="checkbox"/>	<input checked="" type="checkbox"/>	40.80	19/06/2018 09:50:26
		PLI330	30thou Patterned Liner per sqm	50.00	Sqm	34.06	60.00	681.20	25/06/2018	01		<input type="checkbox"/>	<input type="checkbox"/>	45.50	00:00:00
		DELCHG	Delivery Charge	1.00	Item	40.21		40.21	19/06/2018	01		<input type="checkbox"/>	<input type="checkbox"/>	0.00	19/06/2018 09:53:13

▶ Line details

Unit the item is sold in.

NUM Admin | 20/06/2018 | 08:51 | AX2012DR | Close

This order is set to part ship, the first item and header have a requested ship date of the 19/06 and a solar cover 22/06. Adding a liner to the order shows that will ship on the 25/06

Once you have finished adding the new items you need to recalculate the delivery charge

1. Click on the Delivery Charge line

2. Then click Update line

3. Click Delivery Charge

Kit	Type	Item number	Product name	Quantity	Unit	Unit price	Discount percent	Amount	Requested ship date	Mode of delivery	Reference number	Hazardous	Haz by Sea	Weight	Created date and time
		PWW50L	Pleatco Advanced Spa Filter Cartridge Sunrise Spas	1.00	Item	28.35	45.00	15.59	29/06/2018	01		<input type="checkbox"/>	<input type="checkbox"/>	0.70	20/06/2018 08:02:00
		PGA400	GeoBubble Apollo 400 Solar Cover per sq m	45.00	Sqm	7.90	60.00	142.20	29/06/2018	01		<input type="checkbox"/>	<input type="checkbox"/>	18.00	20/06/2018 08:02:08
		PRB50-IN	Filter Cartridge Beachcomber C-4950 FC-2390M	10.00	Item	27.70	45.00	152.35	29/06/2018	01		<input type="checkbox"/>	<input type="checkbox"/>	7.60	20/06/2018 08:08:09
		DELCHG	Delivery Charge	1.00	Item	14.00		14.00	29/06/2018	01		<input type="checkbox"/>	<input type="checkbox"/>	0.00	20/06/2018 08:02:16

Calculate

- Delivery Charge
- Based on BOM/Formula

Update

- Deliver remainder

Process

- Registration
- Pick

Cancel

- Direct delivery

Sales agreement

- Create link
- Attached
- Remove link

After any changes you must take additional payment if they are a Pro Forma account and always re-confirm the sales order

SO00110135 : AAPO01 - AA Pools

File Sales order Sell Manage Pick and pack Invoice Retail General

Credit note Charges VAT Confirmed delivery dates Total discount Tied charges Sales order confirmation Pro forma confirmation Event kanban Service agreement Sales order confirmation Quotation confirmation Journals Prepayment

SO00110135 : AAPO01 - AA Pools Open order

Sales order header

Sales order lines

Kit	Type	Item number	Product name	Quantity	Unit	Unit price	Discount percent	Net amount	Requested ship date	Mode of delivery	Reference number	Hazardous	Haz by Sea	Weight	Created date and time
		PWW50L	Pleatco Advanced Spa Filter Cartridge Sunris... pas	1.00	Item	28.35	45.00	15.59	29/06/2018	01		<input type="checkbox"/>	<input type="checkbox"/>	0.70	20/06/2018 08:02:00
		PGA400	GeoBubble Apollo 400 Solar Cover per sq m	45.00	Sqm	7.90	60.00	142.20	29/06/2018	01		<input type="checkbox"/>	<input type="checkbox"/>	18.00	20/06/2018 08:02:08
		PRB50-IN	Filter Cartridge Beachcomber C-4950 FC-2390	10.00	Item	27.70	45.00	152.35	29/06/2018	01		<input type="checkbox"/>	<input type="checkbox"/>	7.60	20/06/2018 08:08:09
		DELCHG	Delivery Charge	1.00	Item	16.50		16.50	29/06/2018	01		<input type="checkbox"/>	<input type="checkbox"/>	0.00	20/06/2018 08:02:16

Line details

NUM Admin 20/06/2018 09:37 AX2012DR

Press the Sales order confirmation button,
align dates if its a full ship order or remove full ship flag

Amending a Sales Order

Part 2 - Amending Ship Date to a future date on Full Ship Orders

This order has a ship date of the 20/06

Sales order (1 - pla) - Sales order: SO00110132, Norspa Ltd

File Sales order Sell Manage Pick and pack Invoice Retail General

Service order Delete Cancel Edit Header view Line view From all From journal Totals Download online orders Commerce S... Generate from template Attachments Attachments Send payment failure email Email notification log Stock Availability Email notification log Stock

SO00110132 : NORS01 - Norspa Ltd Open order

Sales order header

Sales order lines

Kit	Type	Item number	Product name	Quantity	Unit	Unit price	Discount percent	Net amount	Requested ship date	Mode of delivery	Reference number	Hazardous	Haz by Sea	Weight	Created date and time
		RCH110	6 X 1Kg Relax Small Chlorine Tabs	1.00	Box	90.00	60.00	36.00	20/06/2018	02		<input type="checkbox"/>	<input checked="" type="checkbox"/>	6.80	13/06/2018 20:32:20
		RCH023	6 x 1kg Relax Non-Chlorine Shock Granules	1.00	Box	108.00	60.00	43.20	20/06/2018	02		<input type="checkbox"/>	<input checked="" type="checkbox"/>	6.80	13/06/2018 20:32:20
		RSPA34S	500ml Relax Spa Instant Cartridge Filter Cleaner (Spray)	1.00	Item	9.16	40.00	5.50	20/06/2018	02		<input type="checkbox"/>	<input type="checkbox"/>	0.85	13/06/2018 20:32:21
		NET002S	1 x 250ml Net'Line Waterline Cleaning Gel	2.00	Item	9.30	33.00	12.45	20/06/2018	02		<input type="checkbox"/>	<input type="checkbox"/>	0.62	13/06/2018 20:32:21
		ZAP703	Spa Floating Chlorine Bromine Dispenser	4.00	Item	3.50	33.00	9.30	20/06/2018	02		<input type="checkbox"/>	<input type="checkbox"/>	1.18	13/06/2018 20:32:21
		PRB50-IN	Filter Cartridge Beachcomber C-4950 FC-2390M	1.00	Item	27.70	45.00	15.25	20/06/2018	02		<input type="checkbox"/>	<input type="checkbox"/>	0.76	20/06/2018 08:56:36
		WEBDEL	Website Delivery Charge	1.00	Item	14.00		14.00	20/06/2018	02		<input type="checkbox"/>	<input type="checkbox"/>	0.00	13/06/2018 20:32:21

Latest sales orders

Sales order	Status	Cre...
SO00110132	Open order	13/C
SO00105492	Invoiced	20/C
SO00101984	Invoiced	22/C
SO00097686	Invoiced	13/C
SO00091380	Invoiced	19/C
...

Related information

Click on line details to expand the details area

Line details

Go to the line view

NUM Admin 20/06/2018 10:14 AX2012DR Close

Sales order (1 - pla) - Sales order: SO00110132, Norspa Ltd

File Sales order Sell Manage Pick and pack Invoice Retail General

Service order Purchase order Direct delivery New Edit Delete Cancel Maintain Header view Line view Show Copy From all From journal Totals Download online orders Commerce S... Generate from template Attachments Attachments Send payment failure email Email notification log Email notification Stock Availability Stock

SO00110132 : NORS01 - Norspa Ltd Open order

Latest sales orders

Sales order	Status	Crete
SO00110132	Open order	13/C
SO00105492	Invoiced	20/C
SO00101984	Invoiced	22/C
SO00097686	Invoiced	13/C
SO00091380	Invoiced	19/C
...

Related information

Sales order lines

Kit	Type	Item number	Product name	Quantity	Unit	Unit price	Discount percent	Net amount	Requested ship date	Mode of delivery	Reference number	Hazardous	Haz by Sea	Weight	Created date and time
		RCH110	6 X 1Kg Relax Small Chlorine Tabs	1.00	Box	90.00	60.00	36.00	20/06/2018	02		<input type="checkbox"/>	<input checked="" type="checkbox"/>	6.80	13/06/2018 20:32:20
		RCH023	6 x 1kg Relax Non-Chlorine Shock Granules	1.00	Box	108.00	60.00	43.20	20/06/2018	02		<input type="checkbox"/>	<input checked="" type="checkbox"/>	6.80	13/06/2018 20:32:20
		RSPA34S	500ml Relax Spa Instant Cartridge Filter Cleaner (Spray)	1.00	Item	9.16	40.00	5.50	20/06/2018	02		<input type="checkbox"/>	<input type="checkbox"/>	0.85	13/06/2018 20:32:21
		NET002S	1 x 250ml Net'Line Waterline Cleaning Gel	2.00	Item	9.30	33.00	12.46	20/06/2018	02		<input type="checkbox"/>	<input type="checkbox"/>	0.62	13/06/2018 20:32:21
		ZAP703	Spa Floating Chlorine Bromine Dispenser	4.00	Item	3.50	33.00	9.38	20/06/2018	02		<input type="checkbox"/>	<input type="checkbox"/>	1.18	13/06/2018 20:32:21
		PRB50-IN	Filter Cartridge Beachcomber C-4950 FC-2390M	1.00	Item	27.70	45.00	15.24	20/06/2018	02		<input type="checkbox"/>	<input type="checkbox"/>	0.76	20/06/2018 08:56:36
		WEBDEL	Website Delivery Charge	1.00	Item	14.00		14.00	20/06/2018	02		<input type="checkbox"/>	<input type="checkbox"/>	0.00	13/06/2018 20:32:21

You will note that when an order has aligned dates even ATP items will now have requested and confirmed dates populated

2. To amend dates you use the simulate dates button 

Line details

Delivery date

Requested ship date: 20/06/2018 

Requested receipt date: 21/06/2018 

Confirmed ship date: 20/06/2018 

Confirmed receipt date: 21/06/2018 

Delivery date control: ATP

Misc. delivery info

Over-delivery: 0.00

Under-delivery: 0.00

Mode of delivery: 02

Delivery type:

Carrier information

Carrier account number:

Account code:

Carrier ID:

Shipping location time zone

Time zone: (GMT) Greenwich Mean Time : Dublin, Edinburgh, Lisbon, London

1. Click on the Delivery tab

General Setup Address Product Packing Delivery Price and discount Project Foreign trade Financial dimensions

The day the selling company should ship the item in order to meet the customer's requested receipt date.

9 | GBP | USR Model | usr | pla | initial | NUM | Admin | 20/06/2018 | 10:16 | AX2012DR | Close

On this order you will move shipping from the 20/06 to the 25/06

Available ship and receipt dates (1 - pla)

Mode of delivery: 02 Warehouse: 40 Lead time: 0
Site: PLAHAST Delivery date control: ATP Transport days: 1

Order entry deadline **Current date and time** **Time zone**
My time: 14:10 My date: 20/06/2018 My time: 09:27 (GMT) Casabla
Shipping location time: 15:10 Shipping location date: 20/06/2018 Shipping location time: 10:27 (GMT) Greenwi

Day	Available ship date	Day	Available receipt date	Requested ship date	Confirmed ship date
Wednesday	20/06/2018	Thursday	21/06/2018	20/06/2018	20/06/2018
Thursday	21/06/2018	Friday	22/06/2018		
Friday	22/06/2018	Monday	25/06/2018		
Monday	25/06/2018	Tuesday	26/06/2018		
Tuesday	26/06/2018	Wednesday	27/06/2018		
Wednesday	27/06/2018	Thursday	28/06/2018		
Thursday	28/06/2018	Friday	29/06/2018		
Friday	29/06/2018	Monday	02/07/2018		
Monday	02/07/2018	Tuesday	03/07/2018		
Tuesday	03/07/2018	Wednesday	04/07/2018		

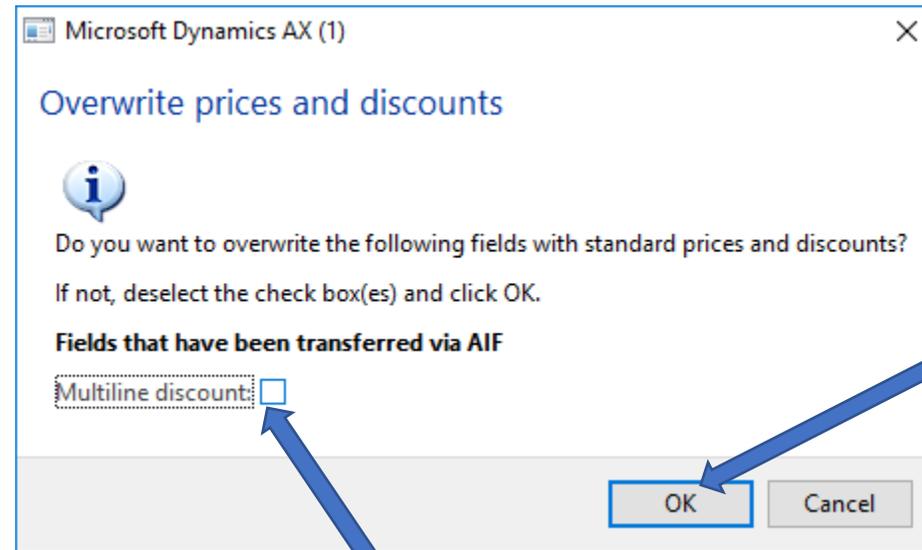
Records displayed: 30

Update requested ship date Update confirmed ship date Cancel

1. Select the new shipping date line from the list

2. Click Update requested ship date

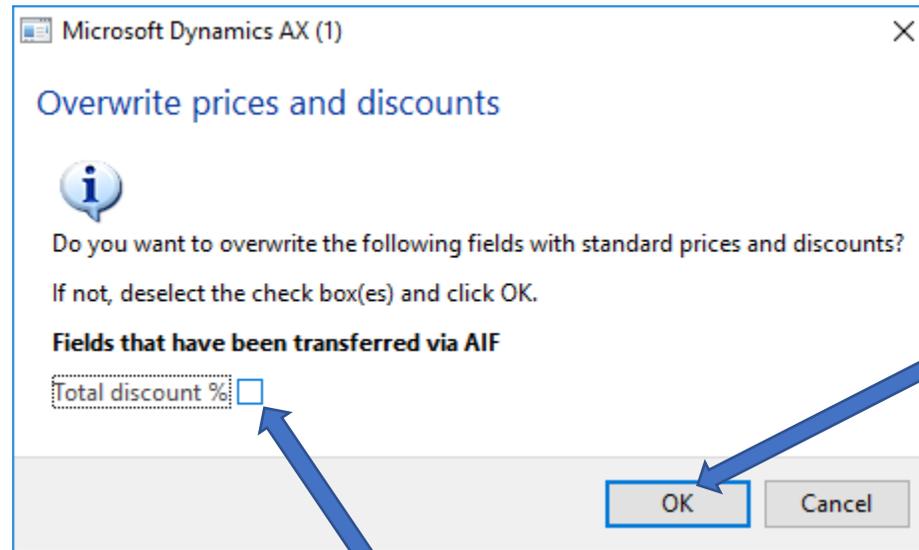
If you get a pop up about Overwriting prices and discounts



2. Click OK

1. Untick the Multiline discount box

You may then get another pop up about Overwriting prices and discounts



2. Click OK

1. Untick the Total discount % box

If the item has delivery date control ATP only the requested dates will be updated

Line details	
Delivery date	
Requested ship date:	25/06/2018 
Requested receipt date:	26/06/2018 
Confirmed ship date:	20/06/2018  
Confirmed receipt date:	21/06/2018 
Delivery date control:	ATP 

Misc. delivery info	
Over-delivery:	0.00
Under-delivery:	0.00
Mode of delivery:	02 
Delivery type:	

Carrier information	
Carrier account number:	
Account code:	
Carrier ID:	

Shipping location time zone	
Time zone:	(GMT) Greenwich Mean Time : Dublin, Edinburgh, Lisbon, London

If the item had delivery date control of CTP it would be updated like this

▲ Line details	
Delivery date	
Requested ship date:	<input type="text" value="25/06/2018"/> 
Requested receipt date:	<input type="text" value="26/06/2018"/> 
Confirmed ship date:	<input type="text" value="25/06/2018"/>  
Confirmed receipt date:	<input type="text" value="26/06/2018"/> 
Delivery date control:	<input type="text" value="CTP"/> 
Misc. delivery info	
Over-delivery:	<input type="text" value="0.00"/>
Under-delivery:	<input type="text" value="0.00"/>
Mode of delivery:	<input type="text" value="02"/> 
Delivery type:	<input type="text"/>
Carrier information	
Carrier account number:	<input type="text"/>
Account code:	<input type="text"/>
Carrier ID:	<input type="text"/>
Shipping location time zone	
Time zone:	<input type="text" value="(GMT) Greenwich Mean Time : Dublin, Edinburgh, Lisbon, London"/>

Now we re-confirm the order and the Align dates system will adjust the other lines and header

File	Sales order		Sell	Manage	Pick and pack	Invoice	Retail	General			
 Credit note Create	 Charges Charges	 VAT Tax	 Confirmed delivery dates	 Multiline discount	 Total discount	 Sales order confirmation	 Pro forma confirmation	 Event kanbans	 Service agreement	 Sales order confirmation	Prepayment
			 Tiered charges	Calculate		Generate	Process	Apply	Journals	Quotation confirmation	Prepayment

The system will ask you to realign all the dates to the 25/06

Ship now sales line overview (1 - pla) ×

Multiple delivery dates, align dates, split sales order or allow multiple deliveries.

<input type="checkbox"/>	Item number	Quantity	Confirmed ship date	Requested ship date
<input type="checkbox"/>	RCH110	1.00	20/06/2018	25/06/2018
<input type="checkbox"/>	RCH023	1.00	20/06/2018	20/06/2018
<input type="checkbox"/>	RSPA34S	1.00	20/06/2018	20/06/2018
<input type="checkbox"/>	NET002S	2.00	20/06/2018	20/06/2018
<input type="checkbox"/>	ZAP703	4.00	20/06/2018	20/06/2018
<input type="checkbox"/>	WEBDEL	1.00	20/06/2018	20/06/2018
<input type="checkbox"/>	PRB50-IN	1.00	20/06/2018	20/06/2018

Options:

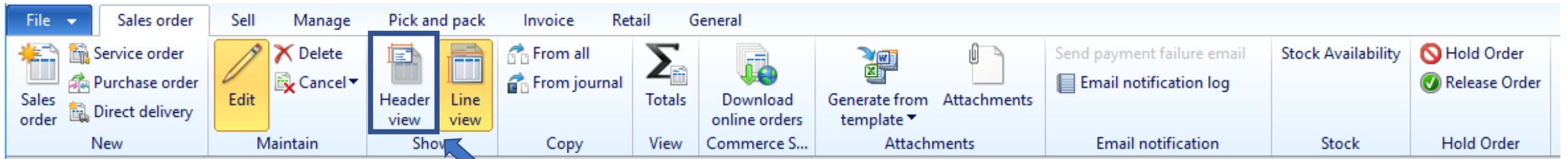


Click OK and the re-confirm the sales order

Amending a Sales Order

Part 3 - Amending Ship Date to an earlier date on Full Ship Orders

If you want to change the ship date to an earlier date, you should change the dates in the header.
Before doing so you should make sure all items will be available on the new shipping date



Click Header view

Go to the Delivery Section on the Header View

The screenshot shows a software interface for a sales order. The title bar reads "Sales order (1 - pla) - Sales order: SO00110132, Norspa Ltd". The menu bar includes "File", "Sales order", "Sell", "Manage", "Pick and pack", "Invoice", "Retail", and "General". The ribbon contains various actions like "Service order", "Purchase order", "Direct delivery", "Edit", "Delete", "Cancel", "Header view", "Line view", "From all", "From journal", "Totals", "Download online orders", "Generate from template", "Attachments", "Send payment failure email", "Email notification log", "Stock Availability", "Hold Order", and "Release Order".

The main content area is titled "SO00110132 : NORS01 - Norspa Ltd" and is divided into several sections:

- General:** Includes fields for Sales order (SO00110132), Retail sale (checkbox), Name (Norspa Ltd), Order type (Sales order), Customer account (NORS01), Invoice account (NORS01), and Contact.
- Contact information:** Includes Internet address, E-mail, Status (Open order), Deadline, Document status (Confirmation), and Quote Reason (N/A).
- Storage dimensions:** Includes Site and Warehouse dropdowns.
- References:** Includes CRM Case No., Customer requisition (100009727), Campaign ID, Customer reference, Project ID, and RMA number.
- Setup:** Includes Paul Armitage-Bates and 14/07/2018.
- Address:** Includes Paul Armitage-Bates and 14/07/2018.
- Delivery:** Expanded section containing:
 - Transport:** Call tag type, UPS zone.
 - Delivery date:** Requested ship date (13/07/2018), Requested receipt date (14/07/2018), Confirmed ship date (13/07/2018), Confirmed receipt date (14/07/2018), Delivery date control (CTP), Blind shipment (checkbox).
 - Shipping location time zone:** Time zone: (GMT) Greenwich Mean Time: Dublin, Edinburgh, Lisbon, London.
 - Delivery information:** Special Haulage Required? (No), Transport Booked: (No), Haulier: Standard.
 - Carrier information:** Carrier account number, Account code, Expedited shipment (checkbox), Charge fuel surcharge (checkbox), Residential destination (checkbox), Carrier ID (with a "Simulates date" button).
 - Misc. delivery info:** Mode of delivery (05), Delivery terms, Delivery reason, Reason for export, Full Order (checkbox).

A blue arrow points to the "Simulates date" button next to the "Carrier ID" field. The status "Open order" is visible in the top right corner of the main content area.

At the bottom, a status bar shows "Simulate available ship and receipt dates" and system information including currency (GBP), user (USR Model), date (21/06/2018), and time (12:41).

Available ship and receipt dates (1 - pla)

Mode of delivery: 05 Warehouse: Lead time: 0
Site: Delivery date control: CTP Transport days: 1

Order entry deadline **Current date and time** **Time zone**
My time: 14:10 My date: 21/06/2018 My time: 11:40 (GMT) Casabla
Shipping location time: 15:10 Shipping location date: 21/06/2018 Shipping location time: 12:40 (GMT) Greenwi

Day	Available ship date	Day	Available receipt date
Friday	22/06/2018	Saturday	23/06/2018
Friday	29/06/2018	Saturday	30/06/2018
Friday	06/07/2018	Saturday	07/07/2018
Friday	13/07/2018	Saturday	14/07/2018
Friday	20/07/2018	Saturday	21/07/2018
Friday	27/07/2018	Saturday	28/07/2018
Friday	03/08/2018	Saturday	04/08/2018
Friday	10/08/2018	Saturday	11/08/2018
Friday	17/08/2018	Saturday	18/08/2018
Friday	24/08/2018	Saturday	25/08/2018
Friday	31/08/2018	Saturday	01/09/2018

Records displayed: 30

Update requested ship date Update confirmed ship date Cancel

The current ship date

1. Select an earlier ship date line

2. Click Update requested ship date

Sales order (1 - pla) - Sales order: SO00110132, Norspa Ltd

File Sales order Sell Manage Pick and pack Invoice Retail General

Service order Purchase order Direct delivery New Edit Delete Cancel Header view Line view From all From journal Totals Download online orders Commerce S... Generate from template Attachments Attachments Send payment failure email Email notification log Stock Availability Hold Order Release Order

SO00110132 : NORS01 - Norspa Ltd Open order

General

Sales order
 Sales order: SO00110132
 Retail sale:
 Name: Norspa Ltd
 Order type: Sales order

Customer
 Customer account: NORS01 One-time customer:
 Invoice account: NORS01
 Contact:

Contact information
 Internet address:
 E-mail:
 Status: Open order
 Deadline:
 Document status: Confirmation
 Quote Reason: N/A

Storage dimensions
 Site:
 Warehouse:

References
 CRM Case No.:
 Customer requisition: 100009727
 Campaign ID:
 Customer reference:
 Project ID:
 RMA number:

Setup

Address Paul Armitage-Bates

Delivery 14/07/2018

Transport
 Call tag type:
 UPS zone:

Delivery date
 Requested ship date: 13/07/2018
 Requested receipt date: 14/07/2018
 Confirmed ship date: 13/07/2018
 Confirmed receipt date: 14/07/2018
 Delivery date control: CTP
 Blind shipment:

Shipping location time zone
 Time zone: (GMT) Greenwich Mean Time : Dublin, Edinburgh, Lisbon, London

Carrier information
 Carrier account number:
 Account code:
 Expedited shipment:
 Charge fuel surcharge:
 Residential destination:
 Carrier ID:

Misc. delivery info
 Mode of delivery: 05
 Delivery terms:
 Delivery reason:
 Reason for export:
 Full Order:

Delivery information
 Special Haulage Required? No
 Transport Booked: No
 Haulier: Standard

Latest sales orders

Sales order	Status	Cre
SO00110...	Open order	13
SO00105...	Invoiced	20
SO00101...	Invoiced	22
SO00097...	Invoiced	13
SO00091...	Invoiced	15
...

Related information

Click the simulates date button again

Simulate available ship and receipt dates

9 | GBP | USR Model | usr | pla | initial | CAPS | NUM | Admin | 21/06/2018 | 12:41 | AX2012DR | Close

Available ship and receipt dates (1 - pla)

Mode of delivery: 05 Warehouse: Lead time: 0
Site: Delivery date control: CTP Transport days: 1

Order entry deadline **Current date and time** **Time zone**
My time: 14:10 My date: 21/06/2018 My time: 11:40 (GMT) Casabla
Shipping location time: 15:10 Shipping location date: 21/06/2018 Shipping location time: 12:40 (GMT) Greenwi

Day	Available ship date	Day	Available receipt date
Friday	22/06/2018	Saturday	23/06/2018
Friday	29/06/2018	Saturday	30/06/2018
Friday	06/07/2018	Saturday	07/07/2018
Friday	13/07/2018	Saturday	14/07/2018
Friday	20/07/2018	Saturday	21/07/2018
Friday	27/07/2018	Saturday	28/07/2018
Friday	03/08/2018	Saturday	04/08/2018
Friday	10/08/2018	Saturday	11/08/2018
Friday	17/08/2018	Saturday	18/08/2018
Friday	24/08/2018	Saturday	25/08/2018
Friday	31/08/2018	Saturday	01/09/2018

Records displayed: 30

Update requested ship date Update confirmed ship date Cancel

1. Select the earlier ship date line

2. Click Update confirmed ship date

Click on Line view

The screenshot shows a software interface for managing sales orders. At the top, there is a menu bar with options like 'File', 'Sales order', 'Sell', 'Manage', 'Pick and pack', 'Invoice', 'Retail', and 'General'. Below the menu is a toolbar with various icons. A blue arrow points to the 'Line view' icon in the 'Pick and pack' section. The main area is divided into sections: 'General' (Sales order, Contact information, Storage dimensions, Status, References), 'Setup' (Address), and 'Delivery' (Transport, Carrier information, Misc. delivery info, Delivery date, Shipping location time zone, Delivery Information). On the right side, there is a sidebar with 'Latest sales orders' and 'Related information' sections. The status bar at the bottom shows 'Freight company' and various system parameters like 'GBP', 'USR Model', 'usr', 'pla', 'initial', 'CAPS', 'NUM', 'Admin', '21/06/2018', '12:46', 'AX2012DR', and a 'Close' button.

File Sales order Sell Manage Pick and pack Invoice Retail General

Service order Purchase order Direct delivery Edit Delete Cancel Header view Line view From all From journal Totals Download online orders Commerce S... Generate from template Attachments Attachments Send payment failure email Email notification log Stock Availability Hold Order Release Order

SO00110132 : NORS01 - Norspa Ltd Open order

Sales order header

Sales order lines

Add line Add lines Add products Remove Sales order line Financials Stock Product and supply Update line Kitting

Kit	Type	Item number	Product name	Quantity	Unit	Unit price	Disc...	Net amount	Requested sh...	Mode of deli...	Reference n...	H	H	Weight	Created date and time
		RCH110	6 X 1Kg Relax Small Chlorine Tabs	1.00	Box	90.00	60.00	36.00	13/07/2018	05		<input type="checkbox"/>	<input checked="" type="checkbox"/>	6.80	13/06/2018 20:32:20
		RCH023	6 x 1kg Relax Non-Chlorine Shock Granules	1.00	Box	108.00	60.00	43.20	13/07/2018	05		<input type="checkbox"/>	<input checked="" type="checkbox"/>	6.80	13/06/2018 20:32:20
		RSPA345	500ml Relax Spa Instant Cartridge Filter Cleaner (Spray)	1.00	Item	9.16	40.00	5.50	13/07/2018	05		<input type="checkbox"/>	<input type="checkbox"/>	0.85	13/06/2018 20:32:21
		NET002S	1 x 250ml Net'Line Waterline Cleaning Gel	2.00	Item	9.30	33.00	12.46	13/07/2018	05		<input type="checkbox"/>	<input type="checkbox"/>	0.62	13/06/2018 20:32:21
		ZAP703	Spa Floating Chlorine Bromine Dispenser	4.00	Item	3.50	33.00	9.38	13/07/2018	05		<input type="checkbox"/>	<input type="checkbox"/>	1.18	13/06/2018 20:32:21
		PRB50-IN	Filter Cartridge Beachcomber C-4950 FC-2390M	1.00	Item	27.70	45.00	15.24	13/07/2018	05		<input type="checkbox"/>	<input type="checkbox"/>	0.76	20/06/2018 08:56:36
		WEBDEL	Website Delivery Charge	1.00	Item			0.00	13/07/2018	05		<input type="checkbox"/>	<input type="checkbox"/>	0.00	13/06/2018 20:32:21

All dates now match the header

Line details

Delivery date
 Requested ship date: 13/07/2018
 Requested receipt date: 14/07/2018
 Confirmed ship date: 13/07/2018
 Confirmed receipt date: 14/07/2018
 Delivery date control: None

Misc. delivery info
 Over-delivery: 0.00
 Under-delivery: 0.00
 Mode of delivery: 05
 Delivery type:

Carrier information
 Carrier account number:
 Account code:
 Carrier ID:

Shipping location time zone
 Time zone: (GMT) Greenwich Mean Time : Dublin, Edinburgh, Lisbon, London

Sales order (1 - pla) - Sales order: SO00110132, Norspa Ltd

File Sales order Sell Manage Pick and pack Invoice Retail General

Credit note Charges VAT Confirmed delivery dates Total discount Tiered charges Sales order confirmation Pro forma confirmation Event kanbans Service agreement Sales order confirmation Quotation confirmation Prepayment

SO00110132 : NORS01 - Norspa Ltd Open order

Sales order header

Sales order lines

Kit	Type	Item number	Product name	Quantity	Unit	Unit price	Disc...	Net amount	Requested sh...	Mode of deli...	Reference n...	H	H	Weight	Created date and time
		RCH110	6 X 1Kg Relax Small Chlorine Tabs	1.00	Box	90.00	60.00	36.00	13/07/2018	05		<input type="checkbox"/>	<input checked="" type="checkbox"/>	6.80	13/06/2018 20:32:20
		RCH023	6 x 1kg Relax Non-Chlorine Shock Granules	1.00	Box	108.00	60.00	43.20	13/07/2018	05		<input type="checkbox"/>	<input checked="" type="checkbox"/>	6.80	13/06/2018 20:32:20
		RSPA34S	500ml Relax Spa Instant Cartridge Filter Cleaner (Spray)	1.00	Item	9.16	40.00	5.50	13/07/2018	05		<input type="checkbox"/>	<input type="checkbox"/>	0.85	13/06/2018 20:32:21
		NET002S	1 x 250ml Net'Line Waterline Cleaning Gel	2.00	Item	9.30	33.00	12.46	13/07/2018	05		<input type="checkbox"/>	<input type="checkbox"/>	0.62	13/06/2018 20:32:21
		ZAP703	Spa Floating Chlorine Bromine Dispenser	4.00	Item	3.50	33.00	9.38	13/07/2018	05		<input type="checkbox"/>	<input type="checkbox"/>	1.18	13/06/2018 20:32:21
		PRB50-IN	Filter Cartridge Beachcomber C-4950 FC-2390M	1.00	Item	27.70	45.00	15.24	13/07/2018	05		<input type="checkbox"/>	<input type="checkbox"/>	0.76	20/06/2018 08:56:36
		WEBDEL	Website Delivery Charge	1.00	Item			0.00	13/07/2018	05		<input type="checkbox"/>	<input type="checkbox"/>	0.00	13/06/2018 20:32:21

Line details

Go to the line view

GBP | USR Model | usr | pla | initial | CAPS | NUM | Admin | 21/06/2018 | 12:49 | AX2012DR | Close

Click Sales order confirmation to re-confirm the order

Amending a Sales Order

Part 4 - Changing the ship date for an item on Part Ship

On Part Ship orders items will be released on the lines ship date

The screenshot displays the 'Sales order (1 - pla) - Sales order: SO00110124, Lifestyle Pool & Leisure Co' window. The 'Sales order lines' table is visible, with the following data:

Kit	Type	Item number	Product name	Quantity	Unit	Unit price	Discount percent	Net amount	Requested ship date	Mode of delivery	Reference number	Hazardous	Haz by Sea	Weight	Created date and time
		PSC920	20ft Solar Protector Sheet	1.00	Item	15.60	60.00	6.24	26/06/2018	01		<input type="checkbox"/>	<input type="checkbox"/>	1.00	13/06/2018 15:47:02
		PRD115	Quick Fit Strap Pack of 3	1.00	Item	10.15	33.00	6.80	22/06/2018	01		<input type="checkbox"/>	<input type="checkbox"/>	0.08	13/06/2018 15:47:07
		DELCHG	Delivery Charge	1.00	Item	9.50		9.50	22/06/2018	01		<input type="checkbox"/>	<input type="checkbox"/>	0.00	13/06/2018 15:47:10

A blue box highlights the 'Requested ship date' column for the first two lines, with a blue arrow pointing to the date '26/06/2018' for the first line and '22/06/2018' for the second line.

On this order the first line has the date of 26/06 and second line 22/06

1. To amend the date click on simulate dates button

The 'Line details' section is also visible, showing fields for 'Delivery date', 'Requested ship date', 'Requested receipt date', 'Confirmed ship date', 'Confirmed receipt date', 'Delivery date control', 'Misc. delivery info', 'Carrier information', and 'Shipping location time zone'. A blue arrow points to the 'Requested ship date' field, which is currently set to 26/06/2018.

Available ship and receipt dates (1 - pla)

Mode of delivery: 01 Warehouse: 40 Lead time: 0
Site: PLAHAST Delivery date control: ATP Transport days: 3

Order entry deadline **Current date and time** **Time zone**
My time: 14:10 My date: 21/06/2018 My time: 13:52 (GMT) Casabla
Shipping location time: 15:10 Shipping location date: 21/06/2018 Shipping location time: 14:52 (GMT) Greenwi

Day	Available ship date	Day	Available receipt date	Requested ship date	Confirmed ship date
Thursday	21/06/2018	Tuesday	26/06/2018		
Friday	22/06/2018	Wednesday	27/06/2018		
Monday	25/06/2018	Thursday	28/06/2018		
Tuesday	26/06/2018	Friday	29/06/2018	26/06/2018	
Wednesday	27/06/2018	Monday	02/07/2018		
Thursday	28/06/2018	Tuesday	03/07/2018		
Friday	29/06/2018	Wednesday	04/07/2018		
Monday	02/07/2018	Thursday	05/07/2018		
Tuesday	03/07/2018	Friday	06/07/2018		
Wednesday	04/07/2018	Monday	09/07/2018		

Records displayed: 30

Update requested ship date Update confirmed ship date Cancel

1. Select a new ship date line

2. Click Update requested ship date

Sales order (1 - pla) - Sales order: SO00110124, Lifestyle Pool & Leisure Co

File Sales order Sell Manage Pick and pack Invoice Retail General

Credit note Charges VAT Confirmed delivery dates Multiline discount Total discount Tiered charges Sales order confirmation Pro forma confirmation Event kanbans Service agreement Quotation confirmation Prepayment

SO00110124 : LIFE01 - Lifestyle Pool & Leisure Co Open order

Latest sales orders

Sales order	Status	Created
SO00110124	Open order	13/06/2018 15:47:02
SO00109798	Invoiced	11/06/2018 15:47:07
SO00109611	Invoiced	08/06/2018 15:47:07
SO00109087	Invoiced	04/06/2018 15:47:07
SO00108710	Invoiced	30/05/2018 15:47:10
...

Related information

Sales order lines

Kit	Type	Item number	Product name	Quantity	Unit	Unit price	Discount percent	Net amount	Requested ship date	Mode of delivery	Reference number	Hazardous	Haz by Sea	Weight	Created date and time
		PSC920	20ft Solar Protector Sheet	1.00	Item	15.60	60.00	6.24	28/06/2018	01		<input type="checkbox"/>	<input type="checkbox"/>	1.00	13/06/2018 15:47:02
		PRD115	Quick Fit Strap Pack of 3	1.00	Item	10.15	33.00	6.80	22/06/2018	01		<input type="checkbox"/>	<input type="checkbox"/>	0.08	13/06/2018 15:47:07
		DELCHG	Delivery Charge	1.00	Item	9.50		9.50	22/06/2018	01		<input type="checkbox"/>	<input type="checkbox"/>	0.00	13/06/2018 15:47:10

Line details

Delivery date

Requested ship date: 28/06/2018
 Requested receipt date: 03/07/2018
 Confirmed ship date: 26/06/2018
 Confirmed receipt date: 29/06/2018
 Delivery date control: ATP

Misc. delivery info

Over-delivery: 0.00
 Under-delivery: 0.00
 Mode of delivery: 01
 Delivery type:

Carrier information

Carrier account number:
 Account code:
 Carrier ID:

Shipping location time zone

Time zone: (GMT) Greenwich Mean Time : Dublin, Edinburgh, Lisbon, London

2. Click on the simulates date button again, amend the date and click on Update confirmed ship date

1. If the confirmed dates are also populated

General Setup Address Product Packing Delivery Price and discount Project Foreign trade Financial dimensions

Simulate available ship and receipt dates

(9) | GBP | USR Model | usr | pla | initial | NUM | Admin | 21/06/2018 | 14:54 | AX2012DR | Close

Repeat the steps on each line you need to change the ship date for

The screenshot shows the Microsoft Dynamics CRM interface for a sales order. The window title is "Sales order (1 - pla) - Sales order: SO00110124, Lifestyle Pool & Leisure Co". The ribbon includes tabs for File, Sales order, Sell, Manage, Pick and pack, Invoice, Retail, and General. The "Invoice" tab is active, and the "Sales order confirmation" button is highlighted with a blue arrow. Below the ribbon, the sales order header shows "SO00110124 : LIFE01 - Lifestyle Pool & Leisure Co" with an "Open order" status. The "Sales order lines" section contains a table with the following data:

Kit	Type	Item number	Product name	Quantity	Unit	Unit price	Discount percent	Net amount	Requested ship date	Mode of delivery	Reference number	Hazardous	Haz by Sea	Weight	Created date and time
		PSC920	20ft Solar Protector Sheet	1.00	Item	15.60	60.00	6.24	28/06/2018	01		<input type="checkbox"/>	<input type="checkbox"/>	1.00	13/06/2018 15:47:02
		PRD115	Quick Fit Strap Pack of 3	1.00	Item	10.15	33.00	6.80	22/06/2018	01		<input type="checkbox"/>	<input type="checkbox"/>	0.08	13/06/2018 15:47:07
		DELCHG	Delivery Charge	1.00	Item	9.50		9.50	22/06/2018	01		<input type="checkbox"/>	<input type="checkbox"/>	0.00	13/06/2018 15:47:10

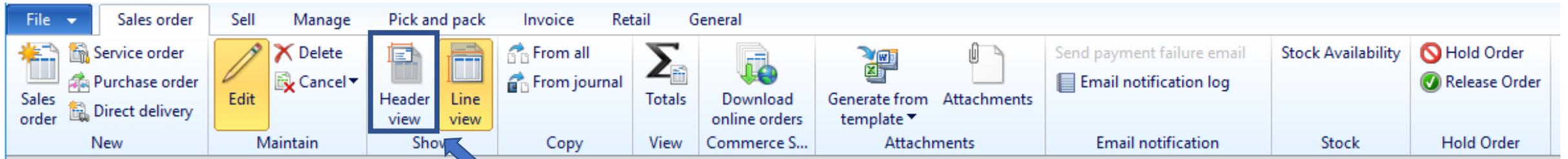
Below the table, the "Line details" section is expanded, showing fields for Delivery date, Misc. delivery info, Carrier information, and Shipping location time zone. The "Requested ship date" field is set to 28/06/2018. The "Delivery date control" is set to ATP. The "Shipping location time zone" is set to (GMT) Greenwich Mean Time: Dublin, Edinburgh, Lisbon, London.

Then click on Sales order confirmation and re-confirm the sales order

Amending a Sales Order

Part 5 - Changing the Mode of Delivery

To amend the Mode of Delivery



Click Header view

Sales order (1 - pla) - Sales order: SO00110132, Norspa Ltd

File Sales order Sell Manage Pick and pack Invoice Retail General

Service order Delete Cancel Edit Header view Line view From all From journal Totals Download online orders Commerce S... Generate from template Attachments Attachments Send payment failure email Email notification log Email notification Stock Availability Hold Order Release Order

SO00110132 : NORS01 - Norspa Ltd Open order

General SO00110132 | Norspa Ltd | NORS01 | NORS01

Sales order

Sales order: SO00110132
 Retail sale:
 Name: Norspa Ltd
 Order type: Sales order

Customer

Customer account: NORS01 One-time customer:
 Invoice account: NORS01
 Contact:

Contact information

Internet address:
 E-mail:
 Status: Open order
 Deadline:
 Document status: Confirmation
 Quote Reason: N/A

Storage dimensions

Site:
 Warehouse:

References

CRM Case No.:
 Customer requisition: 100009727
 Campaign ID:
 Customer reference:
 Project ID:
 RMA number:

Setup

Address Paul Armitage-Bates

Delivery 14/07/2018

Transport

Call tag type:
 UPS zone:

Delivery date

Requested ship date: 13/07/2018
 Requested receipt date: 14/07/2018
 Confirmed ship date: 13/07/2018
 Confirmed receipt date: 14/07/2018
 Delivery date control: CTP
 Blind shipment:

Shipping location time zone

Time zone: (GMT) Greenwich Mean Time : Dublin, Edinburgh, Lisbon, London

Delivery Information

Special Haulage Required? No
 Transport Booked: No
 Haulier: Standard

Carrier information

Carrier account number:
 Account code:
 Expedited shipment:
 Charge fuel surcharge:
 Residential destination:
 Carrier ID:

Misc. delivery info

Mode of delivery: 02
 Delivery terms:
 Delivery reason:
 Reason for export:
 Full Order:

 Click on simulate dates

Freight company

GBP | USR Model | usr | pla | initial | CAPS | NUM | Admin | 21/06/2018 | 12:56 | AX2012DR | Close

1. Update Mode of delivery

Available ship and receipt dates (1 - pla)

Mode of delivery: 02 Warehouse: Lead time: 0
Delivery date control: CTP Transport days: 1

Order entry deadline **Current date and time** **Time zone**
My time: 14:10 My date: 21/06/2018 My time: 11:57 (GMT) Casabla
Shipping location time: 15:10 Shipping location date: 21/06/2018 Shipping location time: 12:57 (GMT) Greenwi

Day	Available ship date	Day	Available receipt date
Monday	02/07/2018	Tuesday	03/07/2018
Tuesday	03/07/2018	Wednesday	04/07/2018
Wednesday	04/07/2018	Thursday	05/07/2018
Thursday	05/07/2018	Friday	06/07/2018
Friday	06/07/2018	Monday	09/07/2018
Monday	09/07/2018	Tuesday	10/07/2018
Tuesday	10/07/2018	Wednesday	11/07/2018
Wednesday	11/07/2018	Thursday	12/07/2018
Thursday	12/07/2018	Friday	13/07/2018
Friday	13/07/2018	Monday	16/07/2018
Monday	16/07/2018	Tuesday	17/07/2018

Records displayed: 30

Update requested ship date Update confirmed ship date Cancel

2. Select the ship date line

3. Click Update requested ship date

Sales order (1 - pla) - Sales order: SO00110132, Norspa Ltd

File Sales order Sell Manage Pick and pack Invoice Retail General

Service order Delete Cancel Edit Header view Line view From all From journal Totals Download online orders Commerce S... Generate from template Attachments Attachments Send payment failure email Email notification log Stock Availability Hold Order Release Order

SO00110132 : NORS01 - Norspa Ltd Open order

General SO00110132 | Norspa Ltd | NORS01 | NORS01

Sales order

Sales order: SO00110132

Retail sale:

Name: Norspa Ltd

Order type: Sales order

Customer

Customer account: NORS01 One-time customer:

Invoice account: NORS01

Contact:

Contact information

Internet address:

E-mail:

Status

Status: Open order

Deadline:

Document status: Confirmation

Quote Reason: N/A

Storage dimensions

Site:

Warehouse:

References

CRM Case No.:

Customer requisition: 100009727

Campaign ID:

Customer reference:

Project ID:

RMA number:

Setup

Address Paul Armitage-Bates

Delivery 14/07/2018

Transport

Call tag type:

UPS zone:

Delivery date

Requested ship date: 04/07/2018

Requested receipt date: 05/07/2018

Confirmed ship date: 13/07/2018

Confirmed receipt date: 14/07/2018

Delivery date control: CTP

Blind shipment:

Shipping location time zone

Time zone: (GMT) Greenwich Mean Time : Dublin, Edinburgh, Lisbon, London

Carrier information

Carrier account number:

Account code:

Expedited shipment:

Charge fuel surcharge:

Residential destination:

Carrier ID:

Misc. delivery info

Mode of delivery: 02

Delivery terms:

Delivery reason:

Reason for export:

Full Order:

Click on simulate dates again

Special Haulage Required? No

Transport Booked: No

Haulier: Standard

Identification of the order.

Close

Available ship and receipt dates (1 - pla)

Mode of delivery: 02 Warehouse: Lead time: 0
Site: Delivery date control: CTP Transport days: 1

Order entry deadline **Current date and time** **Time zone**
My time: 14:10 My date: 21/06/2018 My time: 11:57 (GMT) Casabla
Shipping location time: 15:10 Shipping location date: 21/06/2018 Shipping location time: 12:57 (GMT) Greenwi

Day	Available ship date	Day	Available receipt date
Monday	02/07/2018	Tuesday	03/07/2018
Tuesday	03/07/2018	Wednesday	04/07/2018
Wednesday	04/07/2018	Thursday	05/07/2018
Thursday	05/07/2018	Friday	06/07/2018
Friday	06/07/2018	Monday	09/07/2018
Monday	09/07/2018	Tuesday	10/07/2018
Tuesday	10/07/2018	Wednesday	11/07/2018
Wednesday	11/07/2018	Thursday	12/07/2018
Thursday	12/07/2018	Friday	13/07/2018
Friday	13/07/2018	Monday	16/07/2018
Monday	16/07/2018	Tuesday	17/07/2018

Records displayed: 30

Update requested ship date Update confirmed ship date Cancel

1. Select the ship date line

2. Click Update confirmed ship date

Click on Line view

Sales order (1 - pla) - Sales order: SO00110132, Norspa Ltd

File Sales order Sell Manage Pick and pack Invoice Retail General

Service order Delete Cancel Edit Header view Line view From journal Totals Download online orders Commerce S... Generate from template Attachments Attachments Send payment failure email Email notification log Email notification Stock Availability Hold Order Release Order

SO00110132 : NORS01 - Norspa Ltd

Open order

General

Sales order

Sales order: SO00110132

Retail sale:

Name: Norspa Ltd

Order type: Sales order

Customer

Customer account: NORS01 One-time customer:

Invoice account: NORS01

Contact:

Contact information

Internet address:

E-mail:

Status

Status: Open order

Deadline:

Document status: Confirmation

Quote Reason: N/A

Storage dimensions

Site:

Warehouse:

References

CRM Case No.:

Customer requisition: 100009727

Campaign ID:

Customer reference:

Project ID:

RMA number:

Latest sales orders

Sales order	Status	Crei
SO00110...	Open order	13
SO00105...	Invoiced	20
SO00101...	Invoiced	22
SO00097...	Invoiced	13
SO00091...	Invoiced	15
...

Related information

Address Paul Armitage-Bates 05/07/2018

Delivery

Transport

Call tag type:

UPS zone:

Carrier information

Carrier account number:

Account code:

Expedited shipment:

Charge fuel surcharge:

Residential destination:

Carrier ID:

Misc. delivery info

Mode of delivery: 02

Delivery terms:

Delivery reason:

Reason for export:

Full Order:

Delivery date

Requested ship date: 04/07/2018

Requested receipt date: 05/07/2018

Confirmed ship date: 04/07/2018

Confirmed receipt date: 05/07/2018

Delivery date control: CTP

Blind shipment:

Shipping location time zone

Time zone: (GMT) Greenwich Mean Time : Dublin, Edinburgh, Lisbon, London

Delivery Information

Special Haulage Required? No

Transport Booked: No

Haulier: Standard

Simulate available ship and receipt dates

GBP USR Model usr pla initial CAPS NUM Admin 21/06/2018 13:01 AX2012DR

Close

File Sales order Sell Manage Pick and pack Invoice Retail General

Service order Delete Header view Line view From all From journal Totals Download online orders Generate from template Attachments Attachments

Sales order Direct delivery Edit Cancel Maintain Show Copy View Commerce S... Email notification log Email notification Email notification Stock Availability Hold Order Release Order

SO00110132 : NORS01 - Norspa Ltd Open order

Sales order header

Sales order lines

Add line Add lines Add products Remove Sales order line Financials Stock Product and supply Update line Kitting

Kit	Type	Item number	Product name	Quantity	Unit	Unit price	Disc...	Net amount	Requested sh...	Mode of deli...	Reference n...	H	H	Weight	Created date and time
		RCH110	6 X 1Kg Relax Small Chlorine Tabs	1.00	Box	90.00	60.00	36.00	04/07/2018	02		<input type="checkbox"/>	<input checked="" type="checkbox"/>	6.80	13/06/2018 20:32:20
		RCH023	6 x 1kg Relax Non-Chlorine Shock Granules	1.00	Box	108.00	60.00	43.20	04/07/2018	02		<input type="checkbox"/>	<input checked="" type="checkbox"/>	6.80	13/06/2018 20:32:20
		RSPA34S	500ml Relax Spa Instant Cartridge Filter Cleaner (Spray)	1.00	Item	9.16	40.00	5.50	04/07/2018	02		<input type="checkbox"/>	<input type="checkbox"/>	0.85	13/06/2018 20:32:21
		NET002S	1 x 250ml Net'Line Waterline Cleaning Gel	2.00	Item	9.30	33.00	12.46	04/07/2018	02		<input type="checkbox"/>	<input type="checkbox"/>	0.62	13/06/2018 20:32:21
		ZAP703	Spa Floating Chlorine Bromine Dispenser	4.00	Item	3.50	33.00	9.38	04/07/2018	02		<input type="checkbox"/>	<input type="checkbox"/>	1.18	13/06/2018 20:32:21
		PRB50-IN	Filter Cartridge Beachcomber C-4950 FC-2390M	1.00	Item	27.70	45.00	15.24	04/07/2018	02		<input type="checkbox"/>	<input type="checkbox"/>	0.76	20/06/2018 08:56:36
		WEBDEL	Website Delivery Charge	1.00	Item			0.00	04/07/2018	02		<input type="checkbox"/>	<input type="checkbox"/>	0.00	13/06/2018 20:32:21

Latest sales orders

Sales order	Status	Cre
SO00110...	Open order	13
SO00105...	Invoiced	20
SO00101...	Invoiced	22
SO00097...	Invoiced	13
SO00091...	Invoiced	15
...

Related information

Check all dates and mode of delivery have been updated

Line details

Delivery date	Misc. delivery info	Carrier information
Requested ship date: 04/07/2018	Over-delivery: 0.00	Carrier account number: []
Requested receipt date: 05/07/2018	Under-delivery: 0.00	Account code: []
Confirmed ship date: 04/07/2018	Mode of delivery: 02	Carrier ID: []
Confirmed receipt date: 05/07/2018	Delivery type: []	Shipping location time zone
Delivery date control: None		Time zone: (GMT) Greenwich Mean Time : Dublin, Edinburgh, Lisbon, London

General Setup Address Product Packing Delivery Price and discount Project Foreign trade Financial dimensions

You now need to recalculate the delivery charge and if the customer is Pro Forma take any additional payment including VAT

The screenshot shows the SAP Sales Order interface for SO00110135. The 'Sales order lines' table is visible, with the 'DELCHG' line selected. A context menu is open over the 'Update line' button, with 'Calculate' selected and 'Delivery Charge' highlighted. Three blue arrows point to the 'DELCHG' line, the 'Update line' button, and the 'Delivery Charge' option in the menu.

Kit	Type	Item number	Product name	Quantity	Unit	Unit price	Discount percent	Amount	Requested ship date	Mode of delivery	Reference number	Hazardous	Haz by Sea	Weight	Created date and time
		PWW50L	Pleatco Advanced Spa Filter Cartridge Sunrise Spas	1.00	Item	28.35	45.00	15.59	29/06/2018	01		<input type="checkbox"/>	<input type="checkbox"/>	0.70	20/06/2018 08:02:00
		PGA400	GeoBubble Apollo 400 Solar Cover per sq m	45.00	Sqm	7.90	60.00	142.20	29/06/2018	01		<input type="checkbox"/>	<input type="checkbox"/>	18.00	20/06/2018 08:02:08
		PRB50-IN	Filter Cartridge Beachcomber C-4950 FC-2390M	10.00	Item	27.70	45.00	152.35	29/06/2018	01		<input type="checkbox"/>	<input type="checkbox"/>	7.60	20/06/2018 08:08:09
		DELCHG	Delivery Charge	1.00	Item	14.00		14.00	29/06/2018	01		<input type="checkbox"/>	<input type="checkbox"/>	0.00	20/06/2018 08:02:16

1. Click on the Delivery Charge line

2. Then click Update line

3. Click Delivery Charge

Calculate

- Delivery Charge
- Based on BOM/Formula

Update

- Deliver remainder

Process

- Registration
- Pick

Cancel

- Direct delivery

Sales agreement

- Create link
- Attached
- Remove link

Sales order (1 - pla) - Sales order: SO00110132, Norspa Ltd

File Sales order Sell Manage Pick and pack Invoice Retail General

Credit note Create
 Charges Create
 VAT Tax
 Confirmed delivery dates Calculate
 Multiline discount
 Total discount
 Tiered charges
Sales order confirmation
 Pro forma confirmation
 Event kanbans Process
 Service agreement Apply
 Sales order confirmation
 Quotation confirmation
 Journals
 Prepayment
 Prepayment

SO00110132 : NORS01 - Norspa Ltd Open order

▶ Sales order header

Sales order lines

Kit	Type	Item number	Product name	Quantity	Unit	Unit price	Disc...	Net amount	Requested sh...	Mode of deli...	Reference n...	H	H	Weight	Created date and time
		RCH110	6 X 1Kg Relax Small Chlorine Tabs	1.00	Box	90.00	60.00	36.00	04/07/2018	02		<input type="checkbox"/>	<input checked="" type="checkbox"/>	6.80	13/06/2018 20:32:20
		RCH023	6 x 1kg Relax Non-Chlorine Shock Granules	1.00	Box	108.00	60.00	43.20	04/07/2018	02		<input type="checkbox"/>	<input checked="" type="checkbox"/>	6.80	13/06/2018 20:32:20
		RSPA34S	500ml Relax Spa Instant Cartridge Filter Cleaner (Spr...	1.00	Item	9.16	40.00	5.50	04/07/2018	02		<input type="checkbox"/>	<input type="checkbox"/>	0.85	13/06/2018 20:32:21
		NET002S	1 x 250ml Net'Line Waterline Cleaning Gel	2.00	Item	9.30	33.00	12.46	04/07/2018	02		<input type="checkbox"/>	<input type="checkbox"/>	0.62	13/06/2018 20:32:21
		ZAP703	Spa Floating Chlorine Bromine Dispenser	4.00	Item	3.50	33.00	9.38	04/07/2018	02		<input type="checkbox"/>	<input type="checkbox"/>	1.18	13/06/2018 20:32:21
		PRB50-IN	Filter Cartridge Beachcomber C-4950 FC-2390M	1.00	Item	27.70	45.00	15.24	04/07/2018	02		<input type="checkbox"/>	<input type="checkbox"/>	0.76	20/06/2018 08:56:36
		WEBDEL	Website Delivery Charge	1.00	Item			0.00	04/07/2018	02		<input type="checkbox"/>	<input type="checkbox"/>	0.00	13/06/2018 20:32:21

Line details

Delivery date
 Requested ship date: 04/07/2018
 Requested receipt date: 05/07/2018
 Confirmed ship date: 04/07/2018
 Confirmed receipt date: 05/07/2018
 Delivery date control: None

Misc. delivery info
 Over-delivery: 0.00
 Under-delivery: 0.00
 Mode of delivery: 02
 Delivery type:

Carrier information
 Carrier account number:
 Account code:
 Carrier ID:

Shipping location time zone
 Time zone: (GMT) Greenwich Mean Time : Dublin, Edinburgh, Lisbon, London

General Setup Address Product Packing Delivery Price and discount Project Foreign trade Financial dimensions

The day the selling company should ship the item in order to meet the customer's requested receipt date.

(9) | GBP | USR Model | usr | pla | initial | CAPS | NUM | Admin | 21/06/2018 | 13:03 | AX2012DR | Close

Click Sales order confirmation to re-confirm the order

Amending a Sales Order

Part 6 – Changing mode of delivery on an order that has already been part shipped

Before amending the Mode of Delivery on back ordered lines you should check that an output order hasn't already been created for that line. If it has you must delete it, otherwise any changes you make will not be shown to the picker.

1. Click on Header view

All these items shipped on the 13/06

Kit	Type	Item number	Product name	Quantity	Unit	Unit price	Discount percent	Net amount	Requested ship date	Mode of delivery	Reference number	Hazardous	Haz by Sea	Weight	Created date and time
		LED005	Above Ground Pool RGB LED Light (with R/C)	3.00	Item	175.00	33.00	351.75	13/06/2018	02				6.90	13/06/2018 13:20:14
		SFP500	IFlo 500 0.75hp Pump 20in Filter Package	1.00	Item	383.00	55.00	172.35	13/06/2018	02				24.00	13/06/2018 13:20:20
		PGM514	GeoBubble Midas 500 Solar Cover 14ft x 28ft	3.00	Item	356.40	65.00	374.22	13/06/2018	02				57.60	13/06/2018 13:20:29
		PGA412	GeoBubble Apollo 400 Solar Cover 12ft x 24ft	2.00	Item	213.30	65.00	149.31	13/06/2018	02				24.00	13/06/2018 13:20:36
		LFG401	Self Adhesive R E Gasket Strip 75mm x 25m Roll	1.00	Item	48.70		48.70	13/06/2018	02				1.20	13/06/2018 13:20:40
		LBW001	50m Linerlock Wedge	1.00	Item	41.50		41.50	13/06/2018	02				3.00	13/06/2018 13:23:32
		DELCHG	Delivery Charge	1.00	Item	92.27		92.27	13/06/2018	02				0.00	13/06/2018 13:24:03
		AFP071	Intex Pump Filter Conversion Kit	1.00	Item	38.40	50.00	19.20	13/06/2018	02				1.00	13/06/2018 13:21:17
		PSANT20P4	Pleatco AdvancedSpa Futura Spa Filter Cartridge	6.00	Item	22.00	50.00	66.00	13/06/2018	02				0.00	13/06/2018 13:21:31
		RCH020	6 x 1kg Relax Granular Shock	4.00	Box	78.00	60.00	124.80	13/06/2018	02			<input checked="" type="checkbox"/>	28.00	13/06/2018 13:21:41
		RSPA16	6 x 750g Relax Spa pH Minus	1.00	Item	30.00	60.00	12.00	13/06/2018	02				5.00	13/06/2018 13:22:37
		RSPA14	6 x 500g Relax Spa pH Plus	1.00	Item	27.00	60.00	10.80	13/06/2018	02				3.00	13/06/2018 13:22:42
		RSPA17	6 x 1kg Relax Spa Total Alkalinity Plus	1.00	Item	45.00	60.00	18.00	13/06/2018	02				6.00	13/06/2018 13:22:54
		PWW50L	Pleatco Advanced Spa Filter Cartridge Sunrise Spas	4.00	Item	28.35	50.00	56.70	27/06/2018	01				2.81	22/06/2018 08:31:20

This line was due to ship on the 27/06 by MoD 01, but is now available and the customer needs their back order on an Express service

Line details

Delivery date
Requested ship date: 27/06/2018
Requested receipt date: 02/07/2018
Confirmed ship date: 27/06/2018
Confirmed receipt date: 02/07/2018
Delivery date control: CTP

Misc. delivery info
Over-delivery: 0.00
Under-delivery: 0.00
Mode of delivery: 01
Delivery type:

Carrier information
Carrier account number:
Account code: TUFF
Carrier ID: TUFFNELLS

Shipping location time zone
Time zone: (GMT) Greenwich Mean Time : Dublin, Edinburgh, Lisbon, London

Sales order (1 - pla) - Sales order: SO00110093, Crystal Clear Leisure

File Sales order Sell Manage Pick and pack Invoice Retail General

Service order Delete Header view Line view From all From journal Totals Download online orders Generate from template Attachments Send payment failure email Email notification log Stock Availability Hold Order Release Order

SO00110093 : CRYSO2 - Crystal Clear Leisure

Delivery Instructions:

Delivery

Transport

Call tag type:

UPS zone:

Delivery date

Requested ship date: 13/06/2018

Requested receipt date: 14/06/2018

Confirmed ship date:

Confirmed receipt date:

Delivery date control: CTP

Blind shipment:

Shipping location time zone

Time zone: (GMT) Greenwich Mean Time : Dublin, Edinburgh, Lisbon, London

Delivery Information

Special Haulage Required? No

Transport Booked: No

Haulier: Standard

Vehicle Type: Standard

Are there any height, width or weight restrictions? No

Are there any parking restrictions? No

Comments:

Delivery Cost:

Carrier information

Carrier account number:

Account code: TUFF

Expedited shipment:

Charge fuel surcharge:

Residential destination:

Carrier ID: TUFFNELLS

Misc. delivery info

Mode of delivery: P1

Delivery terms:

Delivery reason:

Reason for export:

Full Order:

1. To amend the MoD we will use the simulate date button

The original shipment went via Tuffnells on a P1 service

Latest sales orders

Sales order	Status	Creator
SO00110093	Delivered	13/06/
SO00108982	Invoiced	01/06/
SO00108737	Invoiced	30/05/
SO00108633	Invoiced	29/05/
SO00107931	Invoiced	21/05/

Related information

Price and discount GBP | EOM1

Packing

Intercompany settings

E-Commerce

Foreign trade

Financial dimensions

Identification of the order.

NUM Admin 22/06/2018 09:36 AX2012DR Close

1. Change the Mode of delivery

Available ship and receipt dates (1 - pla)

Mode of delivery: Warehouse: Lead time:
Site: Delivery date control: Transport days:

Order entry deadline **Current date and time** **Time zone**

My time: My date: My time:
Shipping location time: Shipping location date: Shipping location time:

<input type="checkbox"/>	Day	Available ship date	Day	Available receipt date
	Friday	22/06/2018	Saturday	23/06/2018
	Friday	29/06/2018	Saturday	30/06/2018
	Friday	06/07/2018	Saturday	07/07/2018
	Friday	13/07/2018	Saturday	14/07/2018
	Friday	20/07/2018	Saturday	21/07/2018
	Friday	27/07/2018	Saturday	28/07/2018
	Friday	03/08/2018	Saturday	04/08/2018
	Friday	10/08/2018	Saturday	11/08/2018
	Friday	17/08/2018	Saturday	18/08/2018
	Friday	24/08/2018	Saturday	25/08/2018
	Friday	31/08/2018	Saturday	01/09/2018

Records displayed:

2. Select the required Ship date

3. Update requested ship date

Sales order (1 - pla) - Sales order: SO00110093, Crystal Clear Leisure

File Sales order Sell Manage Pick and pack Invoice Retail General

Service order Delete Header view Line view From all From journal Totals Download online orders Generate from template Attachments Send payment failure email Stock Availability Hold Order Release Order

Sales order Purchase order Direct delivery Edit Cancel Show Copy View Commerce S... Attachments Email notification Stock Hold Order

SO00110093 : CRYSO2 - Crystal Clear Leisure Open order

Delivery Instructions:

Delivery

Transport

Call tag type:

UPS zone:

Delivery date

Requested ship date: 13/06/2018

Requested receipt date: 14/06/2018

Confirmed ship date:

Confirmed receipt date:

Delivery date control: CTP

Blind shipment:

Shipping location time zone

Time zone: (GMT) Greenwich Mean Time : Dublin, Edinburgh, Lisbon, London

Carrier information

Carrier account number:

Account code: TUFF

Expedited shipment:

Charge fuel surcharge:

Residential destination:

Carrier ID: TUFFNELLS

Misc. delivery info

Mode of delivery: P1

Delivery terms:

Delivery reason:

Reason for export:

Full Order:

Delivery Information

Special Haulage Required? No

Transport Booked: No

Haulier: Standard

Vehicle Type: Standar

Are there any height, width or weight restrictions? No

Are there any parking restrictions? No

Comments:

Delivery Cost:

Price and discount GBP | EOM1

Packing

Intercompany settings

E-Commerce

Foreign trade

Financial dimensions

Latest sales orders

Sales order	Status	Creator
SO00110093	Delivered	13/06/
SO00108982	Invoiced	01/06/
SO00108737	Invoiced	30/05/
SO00108633	Invoiced	29/05/
SO00107931	Invoiced	21/05/
...

Related information

Press the simulate date button again

Identification of the order.

NUM Admin 22/06/2018 09:36 AX2012DR Close

Available ship and receipt dates (1 - pla)

Mode of delivery: 05 Warehouse: Lead time: 0
Site: Delivery date control: CTP Transport days: 1

Order entry deadline **Current date and time** **Time zone**
My time: 14:10 My date: 22/06/2018 My time: 08:47 (GMT) Casabla
Shipping location time: 15:10 Shipping location date: 22/06/2018 Shipping location time: 09:47 (GMT) Greenwi

Day	Available ship date	Day	Available receipt date
Friday	22/06/2018	Saturday	23/06/2018
Friday	29/06/2018	Saturday	30/06/2018
Friday	06/07/2018	Saturday	07/07/2018
Friday	13/07/2018	Saturday	14/07/2018
Friday	20/07/2018	Saturday	21/07/2018
Friday	27/07/2018	Saturday	28/07/2018
Friday	03/08/2018	Saturday	04/08/2018
Friday	10/08/2018	Saturday	11/08/2018
Friday	17/08/2018	Saturday	18/08/2018
Friday	24/08/2018	Saturday	25/08/2018
Friday	31/08/2018	Saturday	01/09/2018

Records displayed: 30

Update requested ship date Update confirmed ship date Cancel

1. Select the required Ship date

2. Update confirmed ship date

2. You must then re-confirm the sales order

You will see it has updated all lines even if they have already been shipped

The screenshot displays the Microsoft Dynamics CRM Sales Order interface. The main window shows a list of sales order lines for sales order SO00110093. The 'Requested ship date' column is highlighted with a blue box, and an arrow points to the 'Add line' button. A second arrow points to the 'Requested ship date' column, indicating that the dates have been updated for all lines.

Kit	Item number	Product name	Quantity	Unit	Unit price	Discount percent	Net amount	Requested ship date	Mode of delivery	Reference number	Hazardous	Haz by Sea	Weight	Created date and time
	LED005	Above Ground Pool RGB LED Light (with R/C)	3.00	Item	175.00	33.00	351.75	22/06/2018	05				6.90	13/06/2018 13:20:14
	SFP500	IFlo 500 0.75hp Pump 20in Filter Package	1.00	Item	383.00	55.00	172.35	22/06/2018	05				24.00	13/06/2018 13:20:20
	PGM514	GeoBubble Midas 500 Solar Cover 14ft x 28ft	3.00	Item	356.40	65.00	374.22	22/06/2018	05				57.60	13/06/2018 13:20:29
	PGA412	GeoBubble Apollo 400 Solar Cover 12ft x 24ft	2.00	Item	213.30	65.00	149.34	22/06/2018	05				24.00	13/06/2018 13:20:36
	FG401	Self Adhesive R E Gasket Strip 75mm x 25m Roll	1.00	Item	48.70		48.70	22/06/2018	05				1.20	13/06/2018 13:20:40
	W001	50m Linerlock Wedge	1.00	Item	41.50		41.50	22/06/2018	05				3.00	13/06/2018 13:23:32
	DELCHG	Delivery Charge	1.00	Item	92.27		92.27	22/06/2018	05				0.00	13/06/2018 13:24:03
	AFR001	Intex Pump Filter Conversion Kit	1.00	Item	38.40	50.00	19.20	22/06/2018	05				1.00	13/06/2018 13:21:17
	PSA100P4	Pleatco AdvancedSpa Futura Spa Filter Cartridge	6.00	Item	22.00	50.00	66.00	22/06/2018	05				0.00	13/06/2018 13:21:31
	RCH001	6 x 1kg Relax Granular Shock	4.00	Box	78.00	60.00	124.80	22/06/2018	05				28.00	13/06/2018 13:21:41
	RSPA16	6 x 750g Relax Spa pH Minus	1.00	Item	30.00	60.00	12.00	22/06/2018	05				5.00	13/06/2018 13:22:37
	RSPA14	6 x 500g Relax Spa pH Plus	1.00	Item	27.00	60.00	10.80	22/06/2018	05				3.00	13/06/2018 13:22:42
	RSPA17	6 x 1kg Relax Spa Total Alkalinity Plus	1.00	Item	45.00	60.00	18.00	22/06/2018	05				6.00	13/06/2018 13:22:54
	PWW50L	Pleatco Advanced Spa Filter Cartridge Sunrise Spas	4.00	Item	28.35	50.00	56.70	22/06/2018	05				2.81	22/06/2018 08:31:20

1. If an additional delivery charge is required add a new line, you will need to work out the additional amount manually. If the customer is also pro forma you must take the additional payment including VAT

Line details

Delivery date
Requested ship date: 22/06/2018
Requested receipt date: 23/06/2018
Confirmed ship date: 22/06/2018
Confirmed receipt date: 23/06/2018
Delivery date control: None

Misc. delivery info
Over-delivery: 0.00
Under-delivery: 0.00
Mode of delivery: 05
Delivery type:

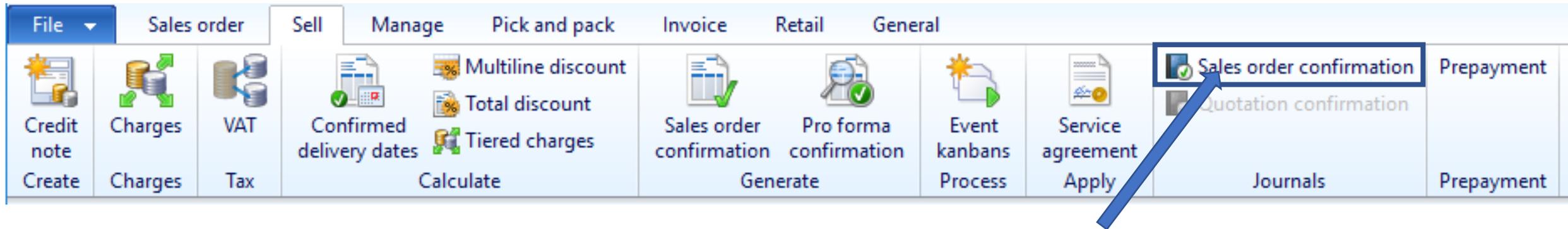
Carrier information
Carrier account number:
Account code:
Carrier ID:

Shipping location time zone
Time zone: (GMT) Greenwich Mean Time : Dublin, Edinburgh, Lisbon, London

General Setup Address Product Packing Delivery Price and discount Project Foreign trade Financial dimensions

The day the selling company should ship the item in order to meet the customer's requested receipt date.

NUM Admin 22/06/2018 09:46 AX2012DR Close



Under Sales order confirmation Journals

Sales order confirmations (1 - pla) - Confirmation: SO00110093-1, CRY502

File

Overview Lines

Preview/Print Charges VAT Send...

<input type="checkbox"/>	Sales order	Date	Customer requisition	Confirmation	Currency	Amount
	SO00110093	13/06/2...		SO00110093-1	GBP	1,777.68
	SO00110093	22/06/2...		SO00110093-2	GBP	68.04

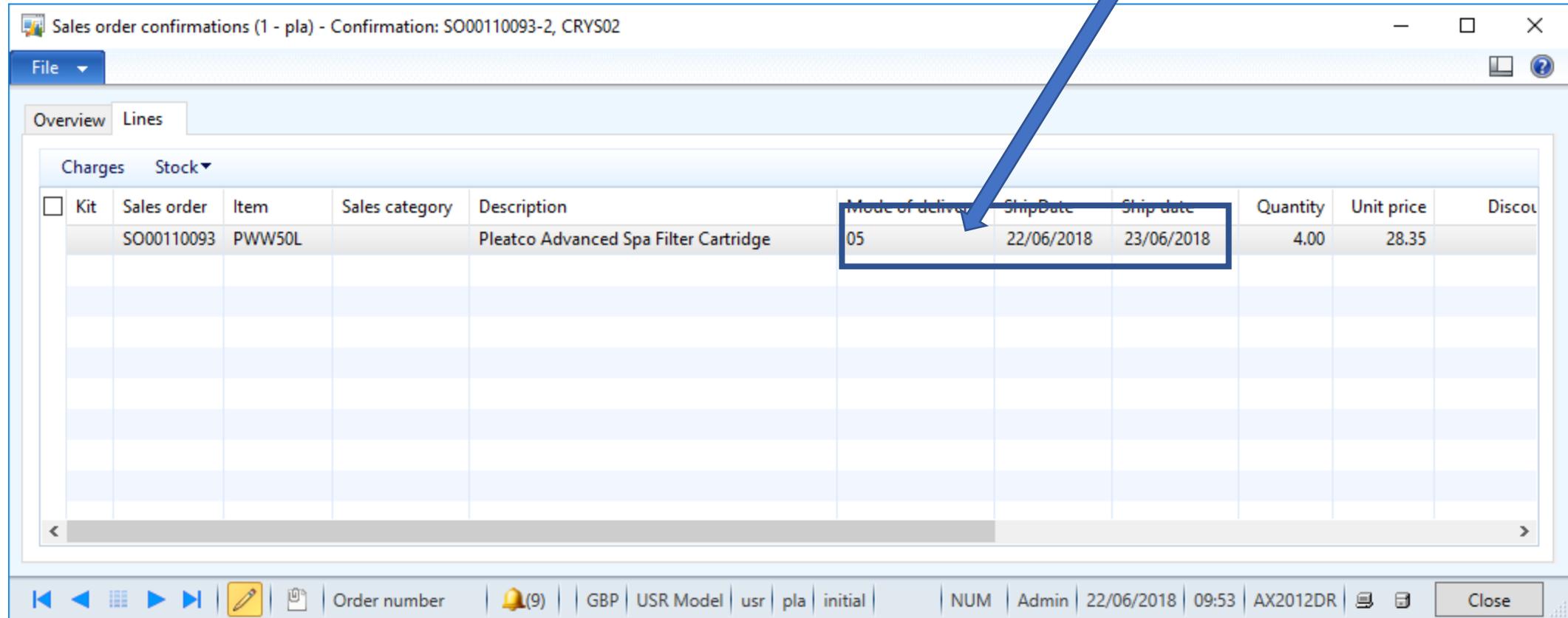
You will find two versions on the sales order

Order number | (9) | GBP | USR Model | usr | pla | initial | NUM | Admin | 22/06/2018 | 09:48 | AX2012DR | Close

The first journal shows the first part of the order was to ship on 13/06 via MoD 02

Kit	Sales order	Item	Sales category	Description	Mode of delivery	ShipDate	Ship date	Quantity	Unit price	Dis
	SO00110093	LED005		Above Ground Pool RGB LED Light (with	02	13/06/2018	14/06/2018	1.00	175.00	
	SO00110093	SFP500		IFlo 500 0.75hp Pump 20in Filter Package	02	13/06/2018	14/06/2018	1.00	383.00	
	SO00110093	PGM514		GeoBubble Midas 500 Solar Cover 14ft x 28ft	02	13/06/2018	14/06/2018	3.00	356.40	
	SO00110093	PGA412		GeoBubble Apollo 400 Solar Cover 12ft x 24ft	02	13/06/2018	14/06/2018	2.00	213.30	
	SO00110093	LFG401		Self Adhesive R E Gasket Strip 75mm x 25m	02	13/06/2018	14/06/2018	1.00	48.70	
	SO00110093	LBW001		50m Linerlock Wedge	02	13/06/2018	14/06/2018	1.00	41.50	
	SO00110093	DELCHG		Delivery Charge	02	13/06/2018	14/06/2018	1.00	92.27	
	SO00110093	AFP071		Intex Pump Filter Conversion Kit	02	13/06/2018	14/06/2018	1.00	38.40	
	SO00110093	PSANT20P4		Pleatco AdvancedSpa Futura Spa Filter	02	13/06/2018	14/06/2018	6.00	22.00	
	SO00110093	RCH020		6 x 1kg Relax Granular Shock	02	13/06/2018	14/06/2018	4.00	78.00	

The second journal only contains the remaining unshipped item with the new MoD and ship date



Sales order confirmations (1 - pla) - Confirmation: SO00110093-2, CRY502

File

Overview Lines

Charges Stock

Kit	Sales order	Item	Sales category	Description	Mode of delivery	Ship Date	Ship date	Quantity	Unit price	Discou
	SO00110093	PWW50L		Pleatco Advanced Spa Filter Cartridge	05	22/06/2018	23/06/2018	4.00	28.35	

Order number | (9) | GBP | USR Model | usr | pla | initial | NUM | Admin | 22/06/2018 | 09:53 | AX2012DR | Close

Amending a Sales Order

Part 7 – Changing the delivery address

In Header View of the Sales Order go to the Address section

The screenshot displays the Microsoft Dynamics AX Sales Order Header View for sales order SO00110124. The interface is divided into several sections: General, Setup, and Delivery. The Address section is currently active, showing the delivery address for Lifestyle Pool & Leisure Co. A blue arrow points to the 'add address' button (a green plus sign in a square) next to the address dropdown menu. Below the arrow, the text 'Click on the add address button' is written.

General

Sales order

Sales order: SO00110124

Retail sale:

Name: Lifestyle Pool & Leisure Co

Order type: Sales order

Customer

Customer account: LIFE01 One-time customer:

Invoice account: LIFE01

Contact: Janette Clark

Contact information

Internet address:

E-mail:

Status

Status: Open order

Deadline:

Document status: Confirmation

Quote Reason: N/A

Storage dimensions

Site:

Warehouse:

References

CRM Case No.

Customer requisition:

Campaign ID:

Customer reference: 6748 / Scott

Project ID:

RMA number:

Setup

Address

Delivery address

Name: Lifestyle Pool & Leisure Co

Delivery address: Lifestyle Pool & Leisure Co

Address: Wyvale Garden Centre
Newport Pagnell Road
Wootton
NORTHAMPTON
NN4 6HP

Delivery contact:

Mobile Tel No.

Alternative Delivery Contact Tel No.

Email Address:

Delivery Instructions:

Third-party shipping address

Third-party name:

Address:

Delivery

Transport

Call tag type:

UPS zone:

Delivery date

Requested ship date: 22/06/2018

Carrier information

Carrier account number:

Account code:

Expedited shipment:

Charge fuel surcharge:

Residential destination:

Misc. delivery info

Mode of delivery: 01

Delivery terms:

Delivery reason:

Reason for export:

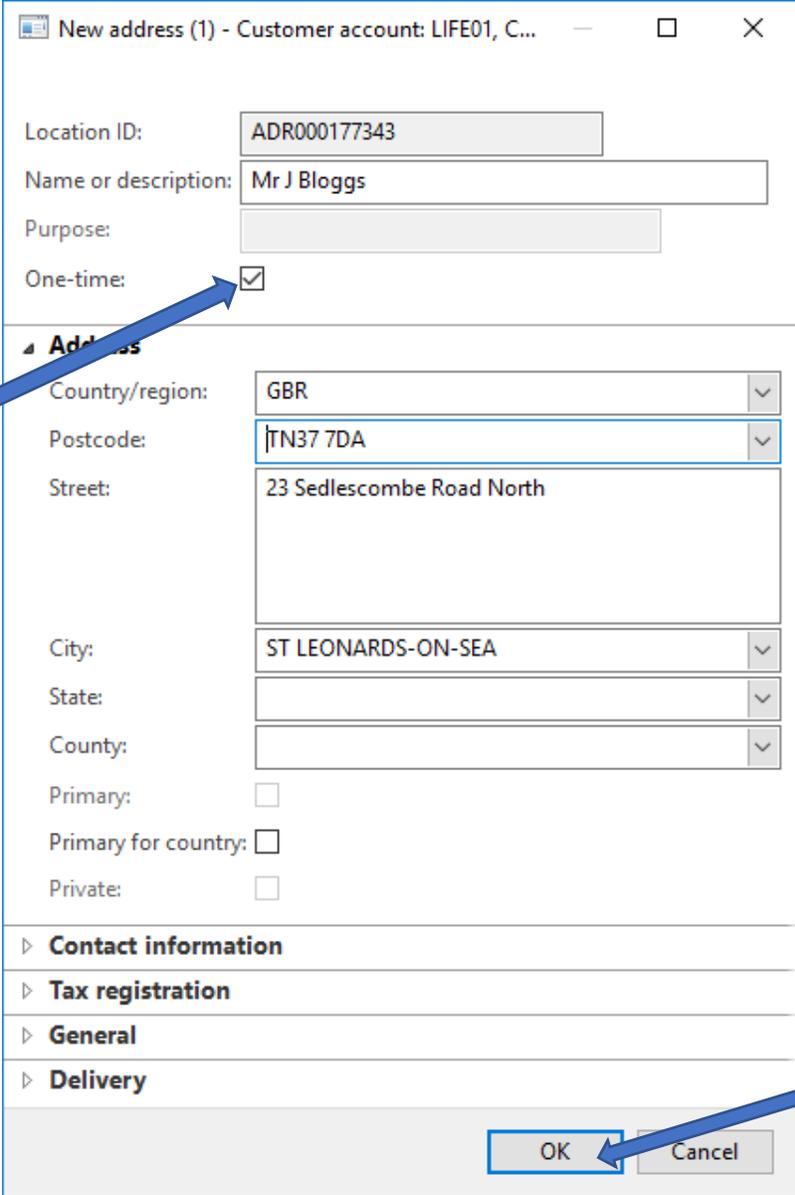
27/06/2018

The name that is associated with the selected delivery address

NUM Admin 21/06/2018 16:27 AX2012DR

Enter your new delivery address

1. Tick One-time



The screenshot shows a 'New address (1) - Customer account: LIFE01, C...' dialog box. The 'One-time' checkbox is checked, and a blue arrow points to it from the instruction '1. Tick One-time'. The 'Address' section contains the following information: Country/region: GBR, Postcode: TN37 7DA, Street: 23 Sedlescombe Road North, City: ST LEONARDS-ON-SEA. At the bottom, the 'OK' button is highlighted with a blue box and a blue arrow points to it from the instruction '2. Click OK'. Other fields include Location ID: ADR000177343, Name or description: Mr J Bloggs, Purpose: (empty), and checkboxes for Primary, Primary for country, and Private. Collapsible sections for Contact information, Tax registration, General, and Delivery are also visible.

Location ID:	ADR000177343
Name or description:	Mr J Bloggs
Purpose:	
One-time:	<input checked="" type="checkbox"/>
Address	
Country/region:	GBR
Postcode:	TN37 7DA
Street:	23 Sedlescombe Road North
City:	ST LEONARDS-ON-SEA
State:	
County:	
Primary:	<input type="checkbox"/>
Primary for country:	<input type="checkbox"/>
Private:	<input type="checkbox"/>
▶ Contact information	
▶ Tax registration	
▶ General	
▶ Delivery	
OK	Cancel

2. Click OK

3. Click on Line view

The screenshot shows the Microsoft Dynamics CRM interface for a sales order. The window title is "Sales order (1 - pla) - Sales order: SO00110124, Lifestyle Pool & Leisure Co". The ribbon includes tabs for File, Sales order, Sell, Manage, Pick and pack, Invoice, Detail, and General. The "Line view" button in the "Sales order" group is highlighted with a blue arrow and labeled "3. Click on Line view".

The main form area is divided into several sections:

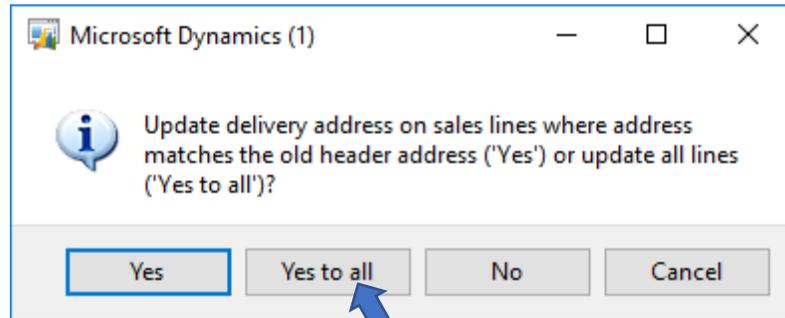
- General:** Contains fields for Sales order (SO00110124), Retail sale, Name (Lifestyle Pool & Leisure Co), Order type (Sales order), Customer account (LIFE01), Invoice account (LIFE01), and Contact (Janette Clark).
- Contact information:** Includes Internet address, E-mail, Status (Open order), Deadline, Document status (Confirmation), and Quote Reason (N/A).
- Storage dimensions:** Includes Site and Warehouse dropdowns.
- References:** Includes CRM Case No., Customer requisition, Campaign ID, Customer reference (6748 / Scott), Project ID, and RMA number.
- Address:** Contains Delivery address (Mr J Bloggs, 23 Sedlescombe Road North, ST LEONARDS-ON-SEA, TN37 7DA, United Kingdom) and Third-party shipping address.
- Delivery contact:** A section containing fields for Delivery contact, Mobile Tel No., Alternative Delivery Contact Tel No., Email Address, and Delivery Instructions, which is highlighted with a blue box and labeled "2. Update any contact details as necessary".
- Delivery:** Includes Transport (Call tag type, UPS zone), Carrier information (Carrier account number, Account code, Expedited shipment), and Misc. delivery info (Mode of delivery, Delivery terms, Delivery reason).

On the right side, there is a "Latest sales orders" table and a "Related information" section.

At the bottom, the status bar shows "The name that is associated with the selected delivery address" and system information including "22/06/2018 | 08:45 | AX2012DR".

1. Update name field if contact as changed

2. Update any contact details as necessary



Click Yes to all

Sales order (1 - pla) - Sales order: SO00110132, Norspa Ltd

File Sales order Sell Manage Pick and pack Invoice Retail General

Credit note Create
 Charges Create
 VAT Tax
 Confirmed delivery dates Calculate
 Multiline discount
 Total discount
 Tiered charges
Sales order confirmation
 Pro forma confirmation
 Event kanbans Process
 Service agreement Apply
 Sales order confirmation
 Quotation confirmation
 Journals
 Prepayment
 Prepayment

SO00110132 : NORS01 - Norspa Ltd Open order

▶ Sales order header

Sales order lines

Kit	Type	Item number	Product name	Quantity	Unit	Unit price	Disc...	Net amount	Requested sh...	Mode of deli...	Reference n...	H	H	Weight	Created date and time
		RCH110	6 X 1Kg Relax Small Chlorine Tabs	1.00	Box	90.00	60.00	36.00	04/07/2018	02		<input type="checkbox"/>	<input checked="" type="checkbox"/>	6.80	13/06/2018 20:32:20
		RCH023	6 x 1kg Relax Non-Chlorine Shock Granules	1.00	Box	108.00	60.00	43.20	04/07/2018	02		<input type="checkbox"/>	<input checked="" type="checkbox"/>	6.80	13/06/2018 20:32:20
		RSPA34S	500ml Relax Spa Instant Cartridge Filter Cleaner (Spr...	1.00	Item	9.16	40.00	5.50	04/07/2018	02		<input type="checkbox"/>	<input type="checkbox"/>	0.85	13/06/2018 20:32:21
		NET002S	1 x 250ml Net'Line Waterline Cleaning Gel	2.00	Item	9.30	33.00	12.46	04/07/2018	02		<input type="checkbox"/>	<input type="checkbox"/>	0.62	13/06/2018 20:32:21
		ZAP703	Spa Floating Chlorine Bromine Dispenser	4.00	Item	3.50	33.00	9.38	04/07/2018	02		<input type="checkbox"/>	<input type="checkbox"/>	1.18	13/06/2018 20:32:21
		PRB50-IN	Filter Cartridge Beachcomber C-4950 FC-2390M	1.00	Item	27.70	45.00	15.24	04/07/2018	02		<input type="checkbox"/>	<input type="checkbox"/>	0.76	20/06/2018 08:56:36
		WEBDEL	Website Delivery Charge	1.00	Item			0.00	04/07/2018	02		<input type="checkbox"/>	<input type="checkbox"/>	0.00	13/06/2018 20:32:21

Line details

Delivery date
 Requested ship date: 04/07/2018
 Requested receipt date: 05/07/2018
 Confirmed ship date: 04/07/2018
 Confirmed receipt date: 05/07/2018
 Delivery date control: None

Misc. delivery info
 Over-delivery: 0.00
 Under-delivery: 0.00
 Mode of delivery: 02
 Delivery type:

Carrier information
 Carrier account number:
 Account code:
 Carrier ID:

Shipping location time zone
 Time zone: (GMT) Greenwich Mean Time : Dublin, Edinburgh, Lisbon, London

General Setup Address Product Packing Delivery Price and discount Project Foreign trade Financial dimensions

The day the selling company should ship the item in order to meet the customer's requested receipt date.

(9) | GBP | USR Model | usr | pla | initial | CAPS | NUM | Admin | 21/06/2018 | 13:03 | AX2012DR | Close

Click Sales order confirmation to re-confirm the order