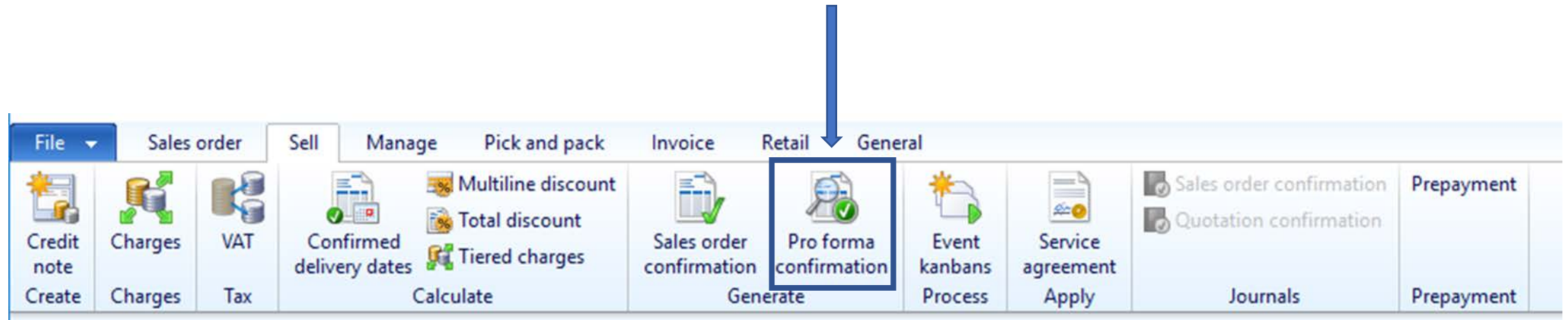


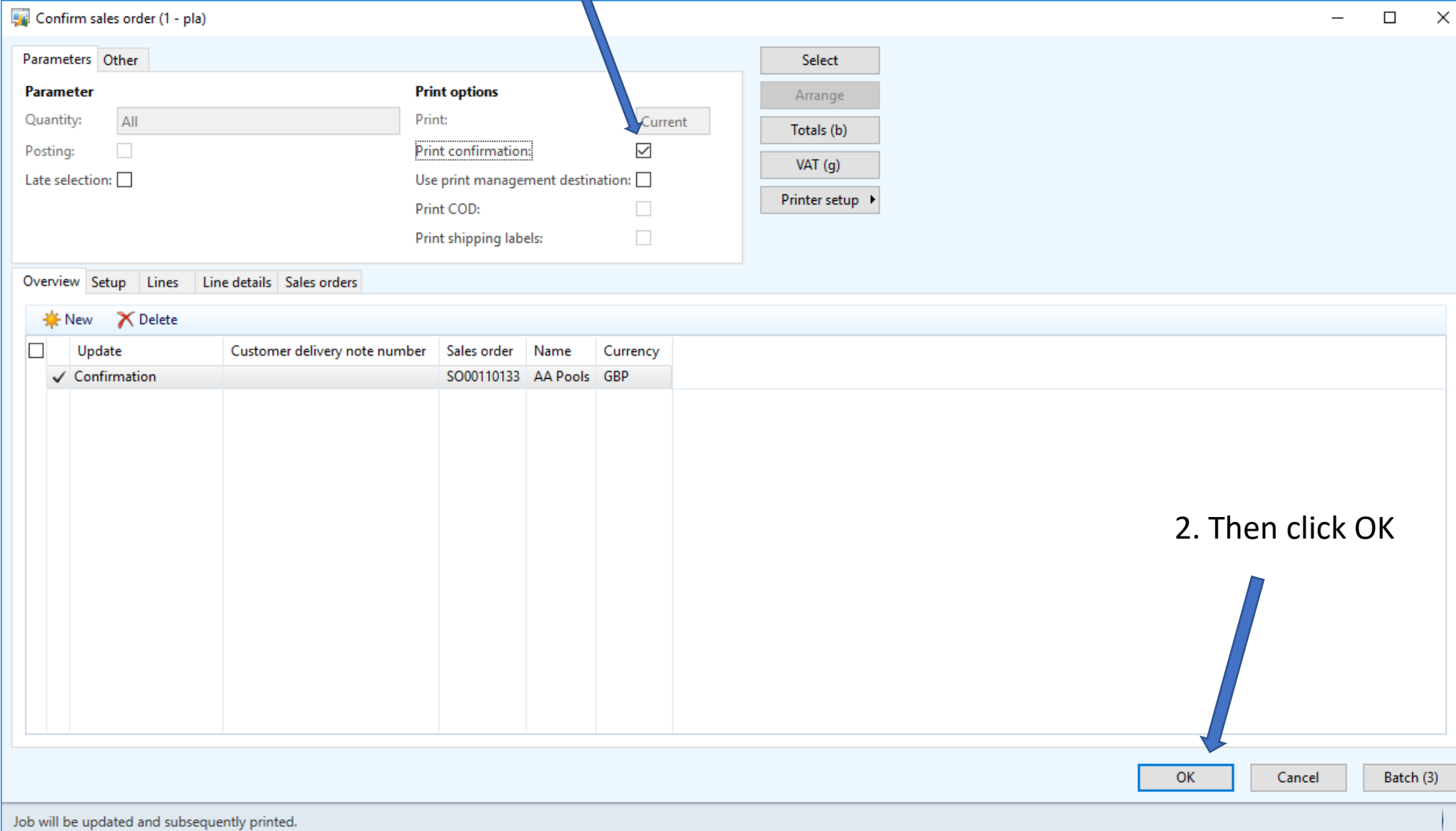
# Creating a Sales Order

Step 5 – Raising a Pro forma for payment upfront

To raise a pro forma click here



1. Tick the Print Confirmation box



The screenshot shows a software window titled "Confirm sales order (1 - pla)". It has a "Parameters" tab selected, with a sub-tab "Other". In the "Print options" section, the "Print confirmation:" checkbox is checked, and a blue arrow points to it from the instruction "1. Tick the Print Confirmation box". Other options include "Print:", "Use print management destination:", "Print COD:", and "Print shipping labels:". To the right are buttons for "Select", "Arrange", "Totals (b)", "VAT (g)", and "Printer setup". Below the parameters is a table with columns: "Update", "Customer delivery note number", "Sales order", "Name", and "Currency". The table has two rows: "Update" (unchecked) and "Confirmation" (checked). At the bottom right, a blue arrow points to the "OK" button, with the instruction "2. Then click OK". The status bar at the bottom says "Job will be updated and subsequently printed."

Confirm sales order (1 - pla)

Parameters Other

**Parameter**

Quantity: All

Posting: ☐

Late selection: ☐

**Print options**

Print: ☐ Current

Print confirmation: ☒

Use print management destination: ☐

Print COD: ☐

Print shipping labels: ☐

Select

Arrange

Totals (b)

VAT (g)

Printer setup ▶

Overview Setup Lines Line details Sales orders

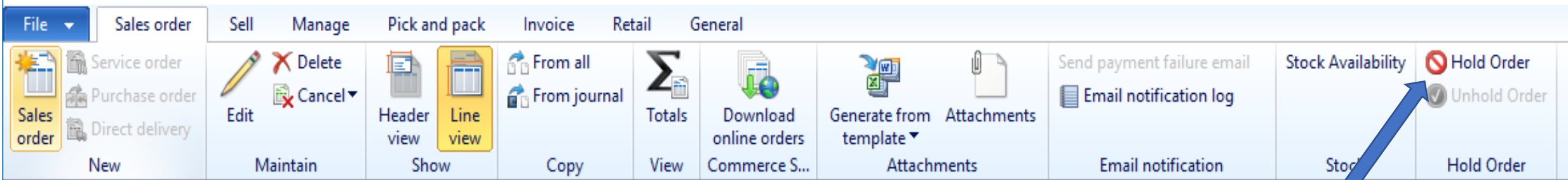
New Delete

|                                     | Update       | Customer delivery note number | Sales order | Name     | Currency |
|-------------------------------------|--------------|-------------------------------|-------------|----------|----------|
| <input checked="" type="checkbox"/> | Confirmation |                               | SO00110133  | AA Pools | GBP      |

OK Cancel Batch (3)

Job will be updated and subsequently printed.

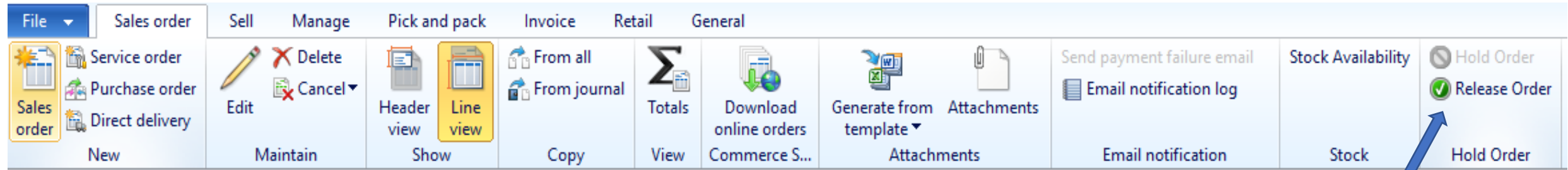
If the customer is sending payment via BACS or is unable to pay for the order immediately then the order must be placed on hold, this will stop any item planning



Click here to put the order on hold

When the order is on hold it will convert it to a journal, you will no longer be able to progress the order until it is released

When payment has been made you must release the order so it can be confirmed and progressed



Click here to release order