



Creating a Sales Order

Customer and item cards must be set up before creating a sales order.

1. In the **Search** box, enter **Sales Orders**, and then choose the related link.
2. On the **Home** tab, in the **New** group, choose **New**.
3. Complete the General Tab
 1. Fill in the **No.** field.
 2. In the **Sell-to Customer No.** field, enter the customer's number. Related customer fields are filled in from based on the information from the customer card.
 3. In in the **Posting Date** field, enter the posting date for this document.
 4. In the **Document Date** field, enter the document date for this document.
 5. **Requested Delivery Date.** Optional field. Fill in the customers requested delivery date.
 6. **Promised Delivery Date.** Optional field. Fill in the promised delivery date.
 7. **Customer PO No.** Optional field. Fill in the customer's purchase order number.
 8. **External Document No.** Optional field. This field is normally left blank. Later, when applying the payment to this order, the External Document No. field is used to record the customer's check number.
 9. **Salesperson Code.** Optional field. Select the sales person responsible for this order. The system automatically enters the salesperson code from the customer card.
 10. **Campaign No.** Optional field. If campaigns are tracked, select the campaign this quote belongs to.
 11. **Opportunity No.** Optional field. If opportunities are tracked, select the opportunity number.
 12. **Responsibility Center.** Optional field. Select the responsibility center for this order. The system automatically enters the responsibility center code from the person entering the order.
 13. **Assigned User ID.** Optional field. Select the user assigned to this quote.



New - Sales Order - 122227

HOME ACTIONS NAVIGATE REPORT

View Edit New Delete Manage Post... Post and Print... Release Reopen Process Copy Document... Create Inventory Put-away / Pick... Statistics Picking List by Order Report OneNote Notes Links Show Attachments

122227

General

No.:	122227	Order Date:	6/19/2015
Sell-to Customer No.:		Document Date:	6/19/2015
Sell-to Contact No.:		Requested Delivery Date:	
Sell-to Customer Name:		Promised Delivery Date:	
Sell-to Address:		Quote No.:	
Sell-to Address 2:		Customer PO No.:	
Sell-to City:		External Document No.:	
Sell-to State / ZIP Code:		Salesperson Code:	
Sell-to ZIP Code:		Campaign No.:	
Sell-to Contact:		Opportunity No.:	
No. of Archived Versions:	0	Responsibility Center:	
Status:	Open	Assigned User ID:	
Posting Date:	6/19/2015	Job Queue Status:	

Show fewer fields

4. Complete the line(s)
 1. On the first quote line, in the **Type** field, select **Item**. (Instructions will assume an item will be quoted, any line type may be selected.) Note: If this is a new item, create an item with a quote status.
 2. In the **No.** field, enter the number of the item to be quoted.
 3. **Description**. The description field will auto fill based on the number selected for the **No.** field. The description can be overridden.
 4. In the **Global Dim 1** field enter the code if applicable. (If this is the first invoice, you will need to choose this column. The actual field name will be the name of your actual company's global dim 1.)
 5. In the **Global Dim 2** field enter the code if applicable. (If this is the first invoice, you will need to choose this column. The actual field name will be the name of your actual company's global dim 2.)



6. **Location.** If you are using locations, enter a location.
7. In the **Quantity** field, enter the quantity of items the customer is ordering.
8. In the **Unit of Measure** field, enter the appropriate unit of measure.
9. **Unit Price Excl. VAT.** If this is an item and the price is set up on the item card, the field will pull the price based on the item card. If the price is not set up on the item card, enter a price. If another line type is being used, enter the price.
10. **Tax Group Code.** Select the appropriate code.
11. **Line Amount Excl. VAT.** This field will auto fill using the formula **Quantity** multiplied by **Unit Price Excl. VAT.**

Type	No.	Descri...	Department Code	Branch Code	Location Code	Quantity	Unit of Measure	Unit Price Excl. Tax	Tax Group Code	Line Amount Excl. Tax
Item										

5. Review the **Invoicing** tab.
 1. **Bill-to Customer No.** Update if necessary. Remaining customer fields will auto fill based on the number entered.
 2. **Payment Terms Code.** Will auto fill based on the customer card. Terms can be overridden.
 3. **Due Date.** Calculated field based on document date and terms.
 4. **Payment Discount %.** Optional. Enter percentage if applicable.
 5. **Payment Discount Date.** Optional. Enter date the discount will expire.
 6. **Payment method code.** Optional. Select from the pull down list.
 7. **Tax Liabile.** Will auto fill based on customer card. Can be overridden.
 8. **Tax Area Code.** Will auto fill based on customer card. Can be overridden.
 9. **Credit Card No.** Enter the credit card number if you are set up to process credit cards.

Invoicing			
Bill-to Customer No.:	<input type="text"/>	Branch Code:	<input type="text"/>
Bill-to Contact No.:	<input type="text"/>	Payment Terms Code:	<input type="text"/>
Name:	<input type="text"/>	Due Date:	<input type="text"/>
Address:	<input type="text"/>	Payment Discount %:	<input type="text" value="0"/>
Address 2:	<input type="text"/>	Pmt. Discount Date:	<input type="text"/>
City:	<input type="text"/>	Payment Method Code:	<input type="text"/>
State / ZIP Code:	<input type="text"/>	Tax Liabile:	<input type="checkbox"/>
ZIP Code:	<input type="text"/>	Tax Area Code:	<input type="text"/>
Contact:	<input type="text"/>	Direct Debit Mandate ID:	<input type="text"/>
Department Code:	<input type="text"/>	Credit Card No.:	<input type="text"/>
		Cr. Card Number (Last 4 Digits):	<input type="text"/>

^ Show fewer fields



6. Review the **Shipping** tab.
 1. **Ship-to code.** Multiple ship-to addresses can be set up per customer. Select the appropriate code if not the default. Remaining address fields will populate based on the code selected.
 2. **Location Code.** Select the code if locations are used. Can also be assigned in the lines.
 3. **Shipment Method Code.** Optional field. Select code from the pull down list.
 4. **Shipping Agent Code.** Optional. Select code from the pull down list. Example, FedEx, UPS, USPS, etc.
 5. **Shipping Agent Service Code.** Optional. Populates only if a Shipping Agent Code is selected. Select code from the pull down list. Example, overnight, next day, etc.
 6. **Shipping Time.** Optional. Populates based on the Shipping Agent Service Code entered.
 7. **Package Tracking No.** Enter the tracking number for this package.
 8. **Shipment Date.** Optional field. Enter the requested shipment date.
 9. **Shipping Advice.** Optional.
7. Select OK or close the order when done.

Release the Sales Order

Invoice discounts and other calculations are not performed until you release the sales order. Once the sales order has been released, you can ship and invoice the items on it.

1. In the **Search** box, enter **Sales Order**, and then choose the related link.



2. Select the document you want to release.
3. On the **Home** tab, in the **Release** group, choose **Release**. The **Status** field has now changed to **Released**.

Reopen a Released Sales Order

1. In the **Search** box, enter **Sales Order**, and then choose the related link.
2. Select the document you want to reopen.
3. On the **Home** tab, in the **Release** group, choose **Reopen**. The **Status** field has now changed to **Open**.

View Sales Order Statistics

Statistics gives an overview of the quotes amounts like quantity, sales dollars, profit percentage, etc.

1. In the **Search** box, enter **Sales Order**, and then choose the related link.
2. Select the quote you want to add information to and choose **Edit**.
3. On the **Home** tab, **Order** group, choose **Statistics**.

Print a Sales Order

1. In the **Search** box, enter **Sales Quotes**, and then choose the related link.
2. Select the quote you want to print. On the **Home** tab, **Process** group, select **Print**.

Blanket Sales Order

If you have customers who commit to a certain number of pieces per year to be shipped throughout the year, use blanket orders to track the quantity shipped and invoiced against the total.

A blanket order tracks the total quantity ordered for the period (normally a year). Sales orders can be created from the blanket sales order to ship and invoice the releases a customer sends against their blanket purchase order. When items are shipped and invoiced on sales orders created from blanket sales orders, the quantity shipped and invoiced is also totaled on the blanket order. You can at any time see the total amount shipped and invoiced for all sales orders created against the blanket.

The total quantity on all sales orders created from the blanket order cannot be greater than the number in the quantity field on the blanket order. If the customer orders more than the quantity on the blanket order, you must increase the quantity on the order.

The quantity on a blanket order does not affect item availability. It is not included in the quantity field on the sales order on the finished good item. Sales orders created from blanket orders affect item availability the same as any other sales order.



Create a Blanket Sales Order

1. In the **Search** box, enter **Blanket Sales Orders**, and then choose the related link.
2. On the **Home** tab, in the **New** group, choose **New**. Create a new blanket sales order.
3. Complete the **General Tab**.
 1. In the **No.** field, you can press the Enter key to select the next available number.
 2. Fill in the **Sell-to Customer No.** field. The remaining address fields are filled in based on the number selected.
 3. Leave the **Order Date** field blank. When the separate sales orders are created from the blanket order, the order date of the sales order is set to equal the actual work date.
 4. Enter a **Document Date**.
 5. **Salesperson Code**. Optional field. Select the sales person responsible for this order. The system automatically enters the salesperson code from the customer card.
 6. **Campaign No.** Optional field. If campaigns are tracked, select the campaign this quote belongs to.
 7. **Responsibility Center**. Optional field. Select the responsibility center for this order. The system automatically enters the responsibility center code from the person entering the order.
 8. **Assigned User ID**. Optional field. Select the user assigned to this quote.



New - Blanket Sales Order - 1006

HOME ACTIONS NAVIGATE

View Edit New Delete Manage | Make Order Print... Statistics Process | OneNote Notes Links Show Attached | Refresh Clear Filter Page | Go to Previous Next

1006

General

No.:	1006	Order Date:	
Sell-to Customer No.:		Document Date:	6/19/2015
Sell-to Contact No.:		External Document No.:	
Sell-to Customer Name:		Your Reference:	
Sell-to Address:		Salesperson Code:	
Sell-to Address 2:		Campaign No.:	
Sell-to City:		Responsibility Center:	
Sell-to State / ZIP Code:		Assigned User ID:	
Sell-to Contact:		Status:	Open

Lines
Invoicing
Shipping
Foreign Trade

4. Complete the **Lines**

1. On the **Lines** FastTab, create separate lines for each shipment. For instance, if your customer wants 1000 units split out equally between four weeks, you would enter four separate lines of 250 units each.
2. Select **Item** in the **Type** field for each line (or appropriate type)
3. Fill in the **No.** field.
4. **Description**. The description field will auto fill based on the number selected for the **No.** field. The description can be overridden.
5. In the **Global Dim 1** field enter the code if applicable. (If this is the first invoice, you will need to choose this column. The actual field name will be the name of your actual company's global dim 1.)
6. In the **Global Dim 2** field enter the code if applicable. (If this is the first invoice, you will need to choose this column. The actual field name will be the name of your actual company's global dim 2.)



7. **Location.** If you are using locations, enter a location.
8. In the **Quantity** field, enter the quantity of items to be included for the shipment.
9. **Qty. to Ship** field is filled in automatically to indicate the quantity that the sales orders are to be created for on the respective shipment dates.
10. In the **Unit of Measure** field, enter the appropriate unit of measure.
11. **Unit Price Excl. VAT.** If this is an item and the price is set up on the item card, the field will pull the price based on the item card. If the price is not set up on the item card, enter a price. If another line type is being used, enter the price.
12. **Tax Group Code.** Select the appropriate code.
13. **Line Amount Excl. VAT.** This field will auto fill using the formula **Quantity** multiplied by **Unit Price Excl. VAT.**
14. In the **Shipment Date** field for each line, enter the date this item must be shipped..
5. Review the **Invoicing** tab per instructions for creating a sales order.
6. Review the **Shipping** tab per the instructions for creating a sales order.

Create a Sales Order from a Blanket Sales Order

1. To create an order for any of the lines in the blanket assembly order, remove the quantity in the **Qty. to Ship** field on all the lines that you DO NOT wish to ship at this time.
2. When you are ready to create orders, on the **Actions** tab, in the **Process** group, choose **Make Order**, and then choose **Yes**. A message appears informing you that the blanket order has been assigned an order number. Note that the blanket order has not been deleted.
3. Choose the **OK** button.



Vertex Systems Sales Orders

Edit - Blanket Sales Order - 1006

HOME ACTIONS NAVIGATE

View Edit New Delete Make Order Print... Statistics OneNote Notes Links Refresh Clear Filter

Manage Process Show Attached Page

1006

General

Lines

Line Type Item

Microsoft Dynamics NAV

Do you want to create an order from the blanket order?

Yes No

Invoicing

Shipping

Foreign Trade

4. To see the results of the preceding steps, on the **Lines** FastTab header, choose **Line**, choose **Unposted Lines**, and then choose **Orders**.



Vertex Systems Sales Orders

Edit - Blanket Sales Order - 1006

HOME ACTIONS NAVIGATE

View Edit New Delete Manage
Make Order Print... Statistics
OneNote Notes Links Show Attached
Refresh Clear Filter Page
Go to Previous Next

1006

General

Lines

Line Functions Find Filter Clear Filter

Item Availability by
Unposted Lines
Posted Lines
Dimensions Ctrl+Shift+D
Comments
Assemble to Order

Description Department Branch Code Location Code Quantity

Orders
Invoices
Return Orders
Credit Memos

Invoicing
Shipping
Foreign Trade

- In the **Sales Lines** window, select the appropriate sales order, on the **Home** tab, in the **Process** group, choose **Show Document**.

View - Sales Lines

HOME NAVIGATE

Show Document Reservation Entries Item Tracking Lines Show as List Show as Chart Refresh Clear Filter Find
Process View Page

Sales Lines Type to filter (F3) Document Type Filter: Order • 1006 • 10000

Docu... Type	Document No.	Sell-to Customer No.	Type	No.	Description	Location Code	Reserve	Quantity	Reserved Qty. (Base)	Ur Me Co



The following applies to sales orders after they have been created from blanket sales orders:

- After the blanket order is converted into a sales order, the sales order contains all the lines from the blanket order. The lines where the quantity in the **Qty. to Ship** field was deleted appear, but with blank **Quantity** fields. You may choose to leave, edit, or delete the lines.
- It is important to remember that the sales order line quantity must not exceed the quantity of the associated blanket order line. Otherwise, posting of the sales order will not be possible.
- When the sales order is posted as shipped and/or invoiced, the **Quantity Shipped** and **Quantity Invoiced** fields are updated on the related blanket order.
- The blanket order number and line number are recorded as properties of the sales lines when created from a blanket order.
- When sales orders are not created directly from the blanket order but still relate to it, a link between a sales order and a blanket order can be established by entering the associated blanket order number in the **Blanket Order No.** field on the sales order line.
- After the sales order has been created for the total quantity of a blanket order line, no other sales order can be created for the same line. Users are prevented from entering a quantity in the **Qty. to Ship** field. If, however, additional quantities need to be added to a blanket order, the value in the **Quantity** field can be increased and additional orders can then be created.
- The invoiced blanket sales order remains in the system until it is deleted, either by deleting individual blanket orders or by running the **Delete Invd Blnkt Sales Orders** batch job.
- If a customer is also recorded as a contact in the Marketing application area, and if you have specified an interaction template code for blanket sales order in the **Marketing Setup** window, an interaction is recorded in the Interaction Log Entry table when you select **Print** to print the blanket sales order.

Ship and Invoice a Sales Order

You can ship and invoice the items on the sales order at the same time or ship and invoice as two separate functions. You can ship and invoice partial quantities. These processes are done through posting the sales order. The **Qty. to Ship** and the **Qty. to Invoice** are the fields that show what quantities will process when posted. The initial values in these fields are automatically entered when the **Quantity** field is originally entered. If needed, the ship and invoice quantities can be reduced to create partial shipments. Note: The sales order header **Shipping Advice** field must show **Partial** in order to actually ship and invoice a partial sales order. You can create as many shipments as needed to complete the order.



Ship and Invoice as the Same Time

When you post the shipment and the invoice, the inventory quantities are updated and the costs are charged to the general ledger accounts from the general posting setup and the customer posting groups.

When choosing the print options when posting all necessary documents print based on the post option selected. For shipments, packing slips print. For invoices, the invoice prints.

Complete Order

1. In the **Search** box, enter **Sales Orders**, and then choose the related link.
2. Create a sales order and fill in the relevant information.
3. In the **Posting Date** field, update the posting date if necessary.
4. In the **Document Date** field, update the document date if necessary.
5. On the **Actions** tab, in the **Process** group, choose **Post** or **Post and Print**.
6. Select **Ship and Invoice**

Partial Order

1. In the **Search** box, enter **Sales Orders**, and then choose the related link.
2. Open a sales order that you want to ship in more than one shipment.
3. In the **Posting Date** field, update the posting date if necessary.
4. In the **Document Date** field, update the document date if necessary.
5. The **Shipping Advice** field must be set to **Partial**.
6. In the **Qty. to Ship** field, enter the quantity that you want to ship.
This can be a lower quantity than the value in the **Quantity** field, indicating that you are about to post a part of the total quantity. The **Qty. to Invoice** field will update to the same quantity entered in the **Qty. to Ship** field.
7. On the **Actions** tab, in the **Process** group, choose **Post** or **Post and Print**. Notice that the **Quantity Shipped** field now shows the part quantity that has been shipped.
8. Select **Ship and Invoice**.
9. When you are ready to post another part of the total quantity, repeat step 4.

Ship and Invoice at Different Times

Complete Order-Shipment

1. In the **Search** box, enter **Sales Orders**, and then choose the related link.
2. Create a sales order and fill in the relevant information.
3. In the **Posting Date** field, update the posting date if necessary.
4. In the **Document Date** field, update the document date if necessary.
5. On the **Shipping** tab update the following as needed:
 1. **Shipment Method Code**
 2. **Shipping Agent Code**
 3. **Shipping Agent Service Code**
 4. **Shipping Time**
 5. **Package Tracking No.**



6. Shipment Date

6. On the **Actions** tab, in the **Process** group, choose **Post** or **Post and Print**.
7. Select **Ship**

Complete Order-Invoice

1. In the **Search** box, enter **Sales Orders**, and then choose the related link.
2. Create a sales order and fill in the relevant information.
3. In the **Posting Date** field, update the posting date if necessary.
4. In the **Document Date** field, update the document date if necessary.
5. On the **Actions** tab, in the **Process** group, choose **Post** or **Post and Print**.
6. Select **Invoice**

Partial Order-Ship

1. In the **Search** box, enter **Sales Orders**, and then choose the related link.
2. Open a sales order that you want to ship in more than one shipment.
3. In the **Posting Date** field, update the posting date if necessary.
4. In the **Document Date** field, update the document date if necessary.
5. On the Shipping tab update the following fields as needed
 1. **Shipment Method Code**
 2. **Shipping Agent Code**
 3. **Shipping Agent Service Code**
 4. **Shipping Time**
 5. **Package Tracking No.**
 6. **Shipment Date**
 7. The **Shipping Advice** field must be set to **Partial**.
6. In the **Qty. to Ship** field, enter the quantity that you want to ship.
 - a. This can be a lower quantity than the value in the **Quantity** field, indicating that you are about to post a part of the total quantity. The **Qty. to Invoice** field will update to the same quantity entered in the **Qty. to Ship** field.
7. On the **Actions** tab, in the **Process** group, choose **Post** or **Post and Print**. Notice that the **Quantity Shipped** field now shows the part quantity that has been shipped.
8. Select **Ship**
9. When you are ready to post another part of the total quantity, repeat step 4.

Partial Order-Invoice

1. In the **Search** box, enter **Sales Orders**, and then choose the related link.
2. Open a sales order that you want to ship in more than one shipment.
3. In the **Posting Date** field, update the posting date if necessary.
4. In the **Document Date** field, update the document date if necessary.
5. On the **Actions** tab, in the **Process** group, choose **Post** or **Post and Print**. Notice that the **Quantity Shipped** field now shows the part quantity that has been shipped.
6. Select **Invoice**
7. When you are ready to post another part of the total quantity, repeat step 4.



Combine Multiple Shipments onto One Invoice

1. In the **Search** box, enter **Sales Invoices**, and then choose the related link.
2. On the **Home** tab, in the **New** group, choose **New**.
3. In the **Sell-to Customer No.** field, enter the customer who will receive the invoice for the shipped items.
4. On the **Lines** FastTab, choose **Actions** , choose **Functions**, and then choose **Get Shipment Lines**.
5. Select the shipment line that you want to include in the invoice:
 - o To insert all lines, select all lines and choose the **OK** button.
 - o To insert specific lines, select the lines and choose the **OK** button. You can use the Ctrl key to select multiple non-sequential lines.
6. If an incorrect shipment line was selected or you want to start over, you can simply delete the lines on the invoice and re-run the **Get Shipment Lines** function.
7. To post the invoice, on the **Actions** tab, in the **Posting** group, choose **Post**.

When shipments are combined on an invoice and posted, a posted sales invoice is created for the invoiced lines. The **Quantity Invoiced** field on the originating blanket sales order or sales order is updated based on the invoiced quantity.

When you invoice shipments in this way, the orders from which the shipments were posted still exist, even if they have been fully shipped and invoiced.

To remove open sales orders

1. In the **Search** box, enter **Delete Invoiced Sales Orders**, and then select the link.
2. Specify in the **No.** filter field which sales orders to delete.
3. Choose the **OK** button.

Alternatively, delete individual sales orders manually.

Printing Options

When printing packing slips and invoices, through the print options box you can choose:

- How many copies to print
- To print your companies address information (Company set up must be completed with this information first.)
- Print tracking numbers on packing slips
- Show assembly components (if applicable)



Reprinting Documents

Documents can be reprinted by selecting **Posted Documents** group on the lower portion of the **Navigation Pane** (located on the left side of the screen). From this menu select the posted document you would like to print and fill in the necessary filters and options.

For further information contact Vertex Support at (800) 536-3427 or support@vertexsystems.com. You can also search the HELP files by searching “Create Sales Quotes” or “Blanket Sales Order” or visit the Microsoft Dynamics NAV library at [http://msdn.microsoft.com/en-us/library/hh172840\(v=nav.71\).aspx](http://msdn.microsoft.com/en-us/library/hh172840(v=nav.71).aspx) (Sales Order) or [http://msdn.microsoft.com/en-us/library/hh178558\(v=nav.71\).aspx](http://msdn.microsoft.com/en-us/library/hh178558(v=nav.71).aspx) (Blanket Sales Order).