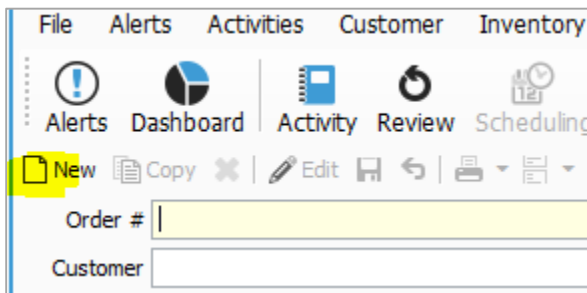
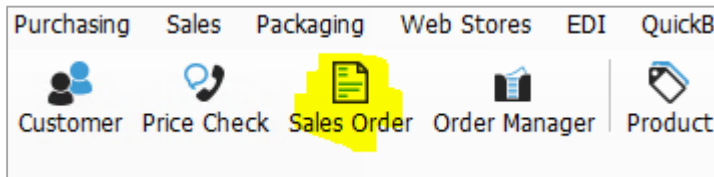


**NOTE: do not create invoice until all fields done.
CANNOT CHANGE AN INVOICE.**

- Select **Sales Order** from top menu + new



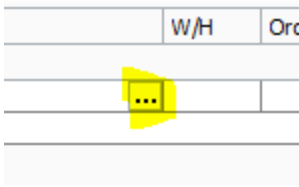
- Input **Customer name**. Select the magnifying glass next to customer field then select customer. Customer details will populate.
- Enter **Date** – take from customer Purchase Order.
- Enter **PO number** – take from customer Purchase Order.

A screenshot of the form fields. The 'Date' field is set to '7/4/2017' and is highlighted in yellow. The 'Location' field is set to 'Main'. The 'PO' field is set to '2356984' and is highlighted in yellow. The 'Ref' field is empty. There is also an 'Email' field at the bottom.

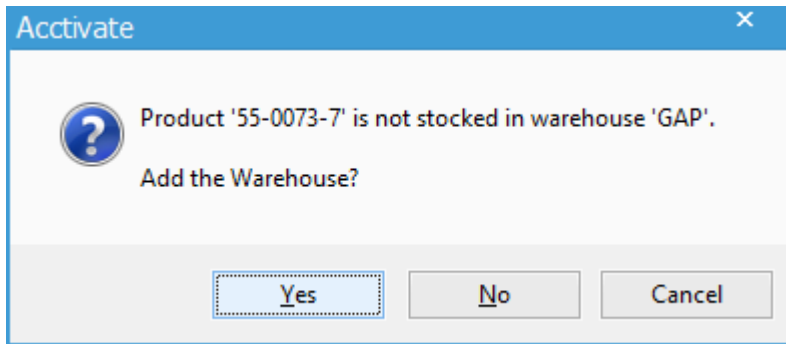
- Next fill in **details**. Select **Product ID**, this will highlight the field as shown. Click this field and select the search field per below to select part.

A screenshot of the 'Detail' view of the sales order. The 'Detail' tab is selected. The 'Billing Address' field contains: PHP Canada, #305-19133 - 26 Ave, Surrey, BC, V3Z 3V7. The 'Shipping Address' field contains the same information. The 'Terms' field is set to 'Net 30' and the 'Branch' field is set to 'ARJUS'. The 'Product ID' field is highlighted in yellow. Below the form are buttons for 'View Product', 'Substitutions', 'Reset...', 'Lot Numbers', and 'Move...'. At the bottom, there is a table with columns for 'Type' and 'Description'. The 'Type' field is set to 'Product ID' and is highlighted in yellow. The 'Description' field is empty. There is a magnifying glass icon next to the 'Description' field.

To list **multiple parts** use the tab key to toggle through to the search field



Acctivate defaults to GAP warehouse. If this window appears – select **NO**.



➤ To the right of **Detail** menu input information as follows:



W/H	Ordered	U/M	Sched	B/O	Pr Cd	Price	U/M	%	Pr Qty	Tax	Amt [USD]
		Special Instructions				Reference		Length	Weight	Class	

- **W/H Warehouse** – check
- **Ordered** – enter quantity
- **B/O (Back order)** - **If in red you cannot invoice.**
- **Price** - input
- **Tax** - + (GST if Canada – 'G' GST only)
- **Special Instructions** – exchange information, handling

- Select **Lot #'s + serial #'s** for each Product ID.

Terms	Net 30	Branch	ARUS
View Product Substitutions Reset... Lot Numbers Move...			
	Type	Product ID	
Description			
1	P	55-0073-7	
Trigger Coil			
*			

- Next Select **Shipping**. Check address (this should be correct if entered using the 'edit' function). Fill out the highlighted fields

Order #	
Customer	PHP Canada
Detail Shipping Customer Payment Additional Info Invoices Notes	
<input checked="" type="checkbox"/> 1 day left	
Shipping Address   Location Note	
PHP Canada #305-19133 - 26 Ave Surrey BC V3Z 3V7	
Ship Attn	
Carrier	
Ship Via	
Service	
Route	Stop
FOB	
Shipment Dates	
Requested	6 /30/2017
Not before	
Promised	
Not after	

Ship via - (Fedex Ground)

Special instructions/comments – at bottom of this 'Shipping' window

- Next check **Customer** field (ensure details correct):

- **Note – CREDIT OK. If not DO NOT PROCESS.**

- Next under **Additional Information** add information e.g Sales person, references etc. If customer PHP, terms are 'outright'.

- Then **SAVE**

NOTE: do not create invoice until all fields done. CANNOT CHANGE AN INVOICE.

Next - create an Invoice ⇒

- Ends -