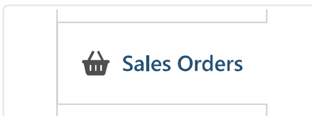
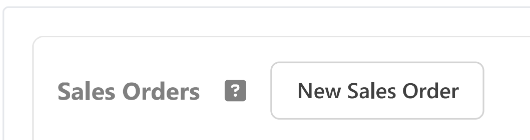
Sales Orders

The **Sales Orders** tab helps you record and monitor orders that you have received from your customers.



To create a new sales order, click on the **New Sales Order** button.



The **Sales Orders** tab features various columns that provide important information about each order:

Date

The **Date** column indicates when the customer received the sales order.

Reference

The **Reference** column displays the reference number of the sales order.

Customer

The **Customer** column displays the name of the customer who placed the sales order.

Sales Quote

The **Sales Quote** column displays the reference number of an approved customer quote. Use this column exclusively if you are employing the **Sales Quotes** tab.

Description

The **Description** column displays the description of the sales order.

Order Amount

The **Order Amount** column displays the total amount of the sales order.

Invoice Amount

The **Invoice Amount** column shows the total from all sales invoices linked to a single sales order. Normally, you would link only one invoice to one order. However, there might be cases where you invoice a customer in stages, issuing several invoices for the same order. This feature ensures that the total amount billed across all invoices matches the value of the order.

Invoice Status

The **Invoice Status** column can display one of the following statuses:

- **Invoiced**
- **Partially Invoiced**
- **Uninvoiced**
- **Not Applicable** (if the Order Amount is zero)

This feature enables you to quickly determine which orders are still awaiting invoicing and which ones have been completely invoiced.

To customize the columns displayed, click on the **Edit columns** button.

See Edit columns for more information.

Monitoring Invoices

To monitor if your sales orders have been accurately invoiced, go to **Edit columns**, then enable the **Invoice Amount** and **Invoice Status** columns.

Tracking Deliveries

If you are utilizing the **Inventory Items** tab to sell inventory items, you have the option to track the delivery status for each order. Click on the **Edit columns** button and activate the **Qty to deliver** and **Delivery Status** columns.

An order is considered **closed** when its **Invoice Status** is set to **Invoiced** and its **Delivery Status** is marked as **Delivered**.

Note: The order status doesn't indicate if the customer has completed payment. Payment tracking is handled in the **Sales Invoices** tab. The main goal of tracking sales orders is to ensure that orders are accurately invoiced and fulfilled.

Using Advanced Queries

Utilize **Advanced Queries** for filtering, sorting, and grouping sales orders on the **Sales Orders** screen. For instance, you can display only the sales orders where a delivery to the customer is still pending.

Select

Date Customer Qty to deliver

Where...

Qty to deliver is not zero

See Advanced Queries for more information.