SALES ORDER ENTRY (NON-STOCK)

Go-to: Sales Orders/Quotes > Sales Order Entry

Sales Order - DMSi Agility™ -- [2CALLIE] [v601 Devel] 50 Item Det... File Sales Order Information Go To Actions 📃 Item Message M HV 📴 Add Non-Stock Item Price and Cost * S **C** \gg Щ 5 😫 Price/Discount Adjustment 🖟 Display Cut File Order Processing * Add Add CM Add Billing Save Order Set Fill from Stock Specify Cancel ommit 🚳 Price and Misc Cost Info 🛛 🔖 View/Edit W/O Status Info 🛛 🚇 Miscellaneous 🔻 Changes History Item Item Header Item Source Status Commit/Und SO Item Actions SO Item Review SO Item Options 🗋 📂 🖬 🔒 • 🛍 🖉 = - P SO ID 2CALLIE 276 Status Branch Order (F7) Payments (F9) Pick/Shipment (F11) Order Information Customer ID RJ 1 🔎 WH 2 Sales agent 1 Callie T (Callie T) • Sale type • Ship-to name Ron Jaworski Customer PO Sales agent 2 ۵ 🖓 Address 1 77 Box Rd. Ordered by Tax code NE_OMAHA Expected delv 09/12/22 Taxable Address 2 TEST - 🖸 date Expected delv date override Full payment required City, State, ZIP Eagle PN 31112-Ship complete (811)-326-1135 Phone Q Accepts backorder Priced pick & delivery Route ID On hold Create PO on save

Step 1. Complete the Sales Order header information

Step 2. Adding the Non-Stock Items

1. Click "Add Item" (Ctrl+A) to move to the Item Detail section.

File S	ales Order Information	GO IO A	ctions						
	C 🚯 Add Billing Header	🔛 💯	Edit Dispato	dı 🗟 Shipment Information	Copy or Move SO	😰 Credit Sales Order	📉 Signature	📟 Cash	🕮 Reward Credit
	Messages		👋 View Dispa	atch Addresses 🛱 Shipping Tracking	Create Quote/Cancel SO	Poc Storage	🛅 Invoice SO	🔜 Check	😼 Open Credit (COD)
Order Item	Item SO Notes	Totals and Costs	🔂 Related Tra	ansactions	🔯 Create Quote/Retain SO	😵 Cancel Sales Order	r 🖶 Partial Invoice	📟 Credit Ca	d
	Order Actions		Orde	r Review	Tra	nsaction Functions			Payments
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SO ID		276	Status		Branch	Cancel Sales Order	→ <i>P</i>		
Order (F7) F	ayments (F9) Pick/Shipment (F11								
Order Inform	nation								
Customer ID	RJ	1 🔎	Sale type	WH	Sales agent 1	Callie T (Callie T)	-		
Ship-to name	Ron Jaworski		Customer PO		Sales agent 2		-		
Address 1	77 Box Rd.		Ordered by		Tax code	NE_OMAHA	P 🖏		
Address 2	TEST		Expected delv date	09/12/22 👻	Ω	Taxable			
City, State, ZI	P Eagle PN 31	112-		Expected delv date override	Ship compl	ete 📃 Ful	l payment required		
Phone	(811)-326-1135		Route ID		Accepts ba	ckorder 📃 Pric	ed pick & delivery		
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2. Enter your Non-Stock Template Item and hit Tab

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Item Det	ail												
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Price				0.000	EA	Co	mmitted	qty	0.0000				
Ext price					0.00	BO			0.0000				
Discount		No Discount											

3. Populate your Non-Stock Template information and *click Save*.

Add Non-Stock It	tem [2CALLIE] [v60)1 Devel]					- 🗆	×
Template item info —								
Item		₽				:	Stocking UOM	
Non-stock item assignm	nent info							
Auto Item		Size						
Non-Stock Item Info	Branch Settings Pri	mary Supplier Info						
Ext description					^			
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Short description								
Product group major		P						
Product group minor		P						
Price code major		P			Price/Discount	0.000	0	
Price code minor		P			Set price	override		
Stocking UOM		P						
Costing UOM		P			Round meth	od		2
Item type					▼ Discount sale	e type		*
Thickness	.0000		Thickness UOM	Inches	 Discount 1 	0.00		
Width	.0000		Width UOM	Inches	Discount 2	0.00		
Piece reference	PC	\sim	Length UOM	Inches	V Discount 3	0.00		
Stock to PC calc	Qty/(TxWxL/12) (i.e.	BF)			\sim			
User-defined					Discount pur	chase type <all></all>		\sim
Reywords					Discount 1	0.00		
					Discount 2	0.00		
					Discount 3	0.00		
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Step 3. Entering the Quantity and Price

1. Enter your quantity orde<u>r and p</u>rice if applicable.

Sales Order - DMSi Agility™ [2CALLIE] [v601 Devel]					601 Devel]	50 Item D)et						
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Ext pric	e				0.00	во			0.0000				
Discour	nt	No Discount											

Step 4. Saving your Sales Order

1. Click one of the Save Icon (*Ctrl+S*)

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Ext pric	e				20.00	BO			0.0000				
Discour	rt	No Discount											

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Step 5. Creating the Purchase Order

1. The Suggested PO window will appear with the PO information to the Default Supplier. Click Create PO.

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X	<u>■</u>	Save On/Off						Sort	Supplier nam	ne, Ship-from na	ame, Branch	, Linked	•• 2↓
Status	Branch	Linked tran ID	Linked tran typ	e Sale type	Expected delv date	Msg	Ship-from name	Created date	Ext cos	t Currency	Weight	:	LA
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