

MyPromoOffice

Sales order to job order confirmation process

If you have any difficulty with following the steps outlined in this help document, please don't hesitate to contact our help team by calling (02) 4302 0160 or via email at help@gunwebsystems.com.au



Document Overview

This document outlines and explains the process of converting a sales order into a job order confirmation:

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MyPromoOffice – Sales order to job order confirmation process

Step 1.0 – Creating a sales order

Once a client has accepted a quote, you are able to initiate a sales order by following the process in the following steps.

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Step 2.0 – Deleting unwanted products

If there are any unwanted products, select delete on delete product to remove the product from the sales order.

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Step 3.0 – Adding a product

To add an additional product, press select product and proceed to search for the desired product by using the products ID number, product code, description or supplier name.

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			Provent by GunWebSystems
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Select Product New Product + Add Custom Product Here Steel Blue Work Boot - TORQUAY - BLACK RUB Add product description here TORQUAY - 030 BLACK RUB	Select Decoration +	1	Edit Price 1.5
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The product selected should be seen here			Save Changes
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MyPromoOffice – Sales order to job order confirmation process

Step 4.0 – Adding a decoration

To add a decoration, follow the outlined process below.



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Step 5.0 – Adding sizes and colours

To add the required sizes and colours to a product, select the product and click on "add product details". Follow the process outlined in the images below:







Step 6.0 – Adding rows for additional specifications

In order to add information for additional rows, you will need to add a change of spec for size, colour needed for the client.





Step 7.0 – Ensuring information is correct

You will need to go through each of the tabs to ensure this information is correct.

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Step 8.0 – Client CRM Settings

You will need to update the date the client needs to be followed up on and add any further relevant information.

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Step 9.0 – Attaching a file

To attach a file, select the large white box in the bottom of the screen to bring up the select a file menu. Follow the steps in the image below.

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MyPromoOffice – Sales order to job order confirmation process

Step 10.0 – Sign off terms

Enter any required sign off terms, select save. After selecting save proceed to the "All" tab.

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Step 11.0 – Check information

Go through all information that you have entered in order to ensure that the information is correct.

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Sales Order Number	SO-19-000108-5	Customer Name		
Sales Person ID	test sales person 🔻		Gun web Systems	
Production Coordinator	iacoui 🔹	Telephone	02 4302 0158	
Customer PO#	1	Address	add1	
		Address 2	add2	
Created Date	04-07-2019			
Due Date	28-06-2019	Address 3	add3	
Follow-up Status	Customer Followed By Email	Town	Town1	
		State	State1	
		Postal Code	123	
		E-mail	sally@gunwebsystems.com.au	
		Fax		
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MyPromoOffice – Sales order to job order confirmation process



MyPromoOffice – Sales order to job order confirmation process

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MyPromoOffice – Sales order to job order confirmation process

Step 12.0 – Confirm order

Once you are satisfied that all information you have entered are correct, you can click confirm order. The second picture is what it should look like after you clicked confirm order. Then you need to click view on the order you just confirmed.

	6 - W 16								Logge	ed in as gunweb	LOGOUT
	GunWebSystems Trigetee Neo Solatives										
				Dashboard	View Quotes	Sales	Job	Purchase F	Reports Us	ers Settin	gs Web Store
Ed	it Sales Order #\$	SO-19-000108-5							•	Confirm Order	Manage Sales Orders
- 5	O Header Details	Quotation Header De	tails Sales Order	Details CRM	File Attachment	s Sign (Off Terms	All			
	Sales Order - I	Header Details									
		ID	70		C	Iffice Addres	s Shipp	oing Address			Ø
	Sales Order	Number	SO-19-0	00108-5			Customer N				
	Sales P	Person ID	test sales person	٣			customer N	Gun	Web Systems		
	Production Cod	ordinator	jacqui				Telep	ne 02.4	302 0158		
	Custo	mer PO#					Add	add1	1		
	Crea	ated Date	04-07-	2019			Addre	add2	2		
	1	Due Date	28-06-	2019			Addre	ss 3 add3	3		
	Follow-u	ip Status	Customer Followe	d By Email 🔹			т	own Town	n1		
							5	state State	e1		
							Postal C	:ode 123			
			Once you are details are c	happy that a orrect, you the the second sec	ll the hen		E-	mail sally	@gunwebsystem	ns.com.au	
			click co	nfirm order.				Fax			
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Ма	nage Sales Orde	ers						Se	elect view		
N	/ork order (67)(Quota	tion : 19-000112) succe	essfully confirmed.								
You Adv	may optionally enter anced Search	a comparison operator	r (<, <=, >, >=, <> or =) at the soginning	of each of your sea	irch values t	o specify ho	ow the comparison s	should be done.	_	
										Display	ing 1-20 of 70 result(s).
No	. Created Date	Sales Order Number	Quotation Number	Master Custom	er Customer		Production Coordinator	Sales Pers	son Fol.	v-up Status	
1	03-07-2019	SO-19-000112-1	19-000112		BWA			System Admini	strator		View Confirm Cancel
2	03-07-2019	SO-19-000112-2	19-000112		BWA	\mathbf{N}		System Admini:	strator SO Confi	rmed	View Convert To Job
3	19-06-2019	SO-19-000108-1	19-000108		Gun Web Syster Test User 2	ns		test sales perso	on Awaiting a	artwork	View Cancel Print PDF
4	24-06-2019	SO-19-000108-2	19-000108		Gun Web Syster Test User 2	ns julian		test sales perso	DN		View Confirm Cancel Print PDF
5	04-07-2019	SO-19-000108-3	19-000108		Gun Web Syster Test User 2	ns		test sales perso	on		View Confirm Cancel Print PDF
6	04-07-2019	SO-19-000108-4	19-000108		Gun Web Syster Test User 2	ns		test sales perso	DN		View Confirm Cancel Print PDF
7	04-07-2019	SO-19-000108-5	19-000108		Gun Web Syster Test User 2	ns jacqu		test sales perso	on SO Confi	rmed	View Convert To Job Cancel Print PDF
8	05-06-2019	SO-19-000107-1 IOD-19-000107-59	19-000107		Anglican Commu Fund Inc Helen Kitching	unity		test sales perso	on SO Conve	erted to Job	View Cancel Print PDF
9	06-06-2019	SO-19-000107-2 1013-19-000107-52	19-000107		Anglican Commu Fund Inc Helen Kitching	unity		test sales perso	on SO Conve	erted to Job	View Cancel Print PDF
10	27-05-2019	SO-19-000106-1 1018-(9-000106-56	19-000106		Anglican Commu Fund Inc Helen Kitching	unity artwo	rk	Bladon User	SO Conve	erted to Job	View Cancel Print PDF
11	01-06-2019	SO-19-000106-2	10,000106		Anglican Commi	unity		Riadon Liser	SO Conve	erted to Job	View Cancel Print

MyPromoOffice – Sales order to job order confirmation process

Step 13.0 – Check information

As seen in step 10, you need to go through each tab in the below images in order to ensure that the information is correct.

	Dashboard	View Quotes	Sales	Job	Purchase	Reports	s Us	sers	Settings
ler #64					Back to :	JOB-19-000108	-64 Ed	dit Sales (Order Ma
etails Sales Order Details CRM File A	Attachments Sign Of	f Terms All							
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Sales Order Number SO-19-01 108-1			Office Addre	iss Ship	pping Addres	3			
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Due Date 28 06-21 9				Addr	ress 2 add2			on	send
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Step 14.0 – Review and send quote

Review the PDF preview that is generated, and if happy. Follow the below steps to send the quotation.

	GunWebSystems Transited Web Solidation				Gun <mark>Web</mark> Systems	
		ORDER CONFI	RMATI	ON		
		SO-19-000	108-1			
		Due Date : 28-0	6-2019			
Quot	tation Number : 19-000	0108			Date : 19-06-2019	
Customer : Gun Web Systems						
E-ma	ail : sally@gunwebsyst	ems.com.au		Pro	duction Coordinator :	
Tele	phone : 02 4302 0158			Sales Perso	n : Test Sales Person	
No	Product	Decoration	Qty	Price Ex GST	Total Ex GST	
1	P3200_BIZ Mens Elite Polo	 Screen Print to Garment: 3 Colour, 1 Position 	100	45.45	4,545.00	
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2	627539-030-BLK_STE Steel Blue Work Boot - TORQUAY - BLACK RUB	1. Screen Print to Garment: 3 Colour, 1 Position	10	27.97	279.70	
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MyPromoOffice – Sales order to job order confirmation process

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