

# Project Sales Order Inbox

## Module Guide: Project Sales Order Inbox

### Module Location

Project > Project Sales Order > Project Sales Order Inbox

### Module Objective

The **Project Sales Order Inbox** module serves as the approval center for all **Project Sales Order** documents. Every Project SO that is created must be reviewed and approved here by an authorized manager before it becomes an active and billable sales contract.

## 1. Main View (Project SO List)

The main page of this module is an "inbox" that displays all Project SO documents requiring your action.

### View Explanation

This page provides a summary of all Project SOs that are awaiting approval.

- **Filters:** You can search for a specific document by **Sales Order Number** or a **Date** range.
- **Document List:** The table below will display all documents awaiting action, with columns such as **Sales Order Number**, **Customer**, **Sales Order Status**, and **Approval**.

## 2. Approval Process Steps

The following is the standard workflow for an approver.

### Step 1: Access the Inbox

Open the **Project Sales Order Inbox** module to see the list of SOs that require approval.

### Step 2: Review the Project SO Details

Click on one of the rows in the table to open the detail view of that Project SO. In the detail page, you can check all the information, such as the details of the project stages, the contract value, and customer data.

### Step 3: Provide Approval

After you review the Project SO details in Step 2, you will find a button to grant approval (e.g., an "**Approve**" button) **within that detail page**. Click the appropriate button to complete the review process.

### Workflow & Integrated Business Process

1. A Project Sales Order document is created and submitted.
2. The document automatically enters the queue in this **Inbox**.
3. A manager reviews and approves it.
4. After approval, the Project SO becomes a **valid contract** and the **basis for project billing** to the customer according to the agreed-upon stages.

## Tips & Important Notes

- The approval process here is the formal step to **bind the project sales contract** with the customer.
  - This module is typically accessed by a **Sales Manager, Project Manager, or a relevant director**.
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