Sales Order Inbox

Module Guide: Sales Order Inbox

Module Location

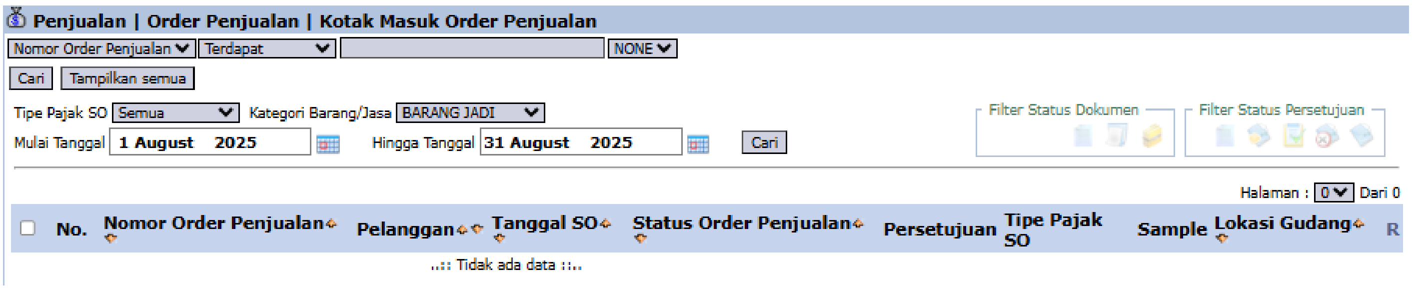
Sales > Sales Order > Sales Order Inbox

Module Objective

The **Sales Order Inbox** module serves as the approval center for all **Sales Order (SO)** documents that have been created and submitted. This module is used by a superior or manager who is authorized to conduct a final review and provide approval before an SO can be processed further by the warehouse department for shipment.

1. Main View (Sales Order List)

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



View Explanation & Filters

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

- **Filters**: You can search for a specific SO by **Sales Order Number**, **SO Type**, **Goods/Services Category**, or a date range (**Start Date** and **End Date**).

- **Request List**: The table below will display all SOs awaiting action. The table currently shows "...No Data Available...".

Column Explanation

- **Sales Order Number**: The unique number of the submitted SO document.

- **Customer**: The name of the customer associated with the SO.

- **SO Date**: The date the SO was created.

- **Sales Order Status / Approval**: Icons that indicate the document's status and the approval process status.

2. Approval Process Steps

The following is the standard workflow for an approver.

Step 1: Access the Inbox

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

Step 2: Review the Sales Order Details

Click on one of the rows in the table to open its detail view. In the detail view, you can check all the information that has been input, such as the product details, prices, discounts, customer credit availability, and other terms.

Step 3: Provide Approval

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

3. Workflow & Integrated Business Process

1. **Submission**: A user (e.g., a sales admin) creates a document in the **Sales Order** module and clicks **Confirm**.

2. **Entering the Queue**: The confirmed SO automatically enters the queue in this **Sales Order Inbox** module.

3. **Review & Approval**: A manager or approver opens this module, reviews, and provides approval.

4. **Warehouse Process**: After approval, the SO becomes the official instruction for the **Warehouse Department** to begin the process of preparing and shipping the goods.

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