

Sales Order

Module Guide: Sales Order

Module Location

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Module Objective

The **Sales Order (SO)** module is the center of the sales process. Its purpose is to create an official internal document that confirms an order from a customer. An approved SO becomes the instruction for the Warehouse department to prepare and ship the goods, and subsequently becomes the basis for creating the Sales Invoice.

1. Main View (Sales Order List)

The main page of this module displays a list of all Sales Orders that have been created.

The screenshot shows the 'Penjualan | Order Penjualan | Order Penjualan' interface. It includes a search bar with 'Cari' and 'Tampilkan semua' buttons. Filters include 'Nomor Order Penjualan', 'Terdapat', 'NONE', 'Tipe Pajak SO', 'Kategori Barang/Jasa', 'Status Aktif', 'Lokal', 'Ekspor', 'Mulai Tanggal', and 'Hingga Tanggal'. There are also filter buttons for 'Filter Status Dokumen', 'Filter Status Order Penjualan', and 'Filter Status Persetujuan'. The table has columns: No., Nomor Order Penjualan, Pelanggan, No PO Pelanggan, Tanggal SO, Status Dokumen, Status Order Penjualan, Persetujuan, Tagihan, Status Aktif, and File Lampiran. The table is currently empty, showing '...: Tidak Ada Data :...'. At the bottom, there are buttons for 'Baru', 'Cetak', and 'Ubah Status'.

View Explanation & Filters

This page is for viewing and managing all SOs.

- **Filters:** You can search for a specific SO by **Sales Order Number**, **SO Type**, **Goods/Services Category**, **Status**, or a date range.
- **SO List:** The table below displays all SOs that match the filters, with columns such as **Sales Order Number**, **Customer**, **Customer's PO No.** (Customer's Purchase Order Number), **SO Date**, and various statuses.

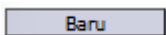
Button Functions

- **New:** The primary button to create a new Sales Order.
- **Print:** To print the details of a selected SO.
- **Change Status:** To change the status of a selected SO.

2. Steps to Create a Sales Order

Step 1: Create a New Sales Order

From the Main View, click the **New** button to open the new SO creation form.



Step 2: Fill in Header Information

At the top of the form, fill in the general order information:

- **Source document:** It is highly recommended to select a **Source document** such as an existing **Quotation** or **Sales Contract**. This will automatically pull the customer, product, and pricing data to reduce errors.

Sumber dokumen : Quotation Faktur Proforma SalesContract

- **Customer:** If not pulling from a source document, select the **Customer** manually.

File Upload
(Purchase Order from Customer in pdf) : No file chosen
Pelanggan * :

- **Reference Information:** Fill in important dates such as **SO Date**, **Due Date**, and **Customer PO Date**. You can also upload the PO file from the customer.

Tgl Jatuh Tempo : Tanggal PO Pelanggan :

- **Credit Info:** Pay attention to the **CreditInfo** box on the right side, which displays the customer's credit limit information. The system may reject the transaction if it exceeds the existing limit.

CreditInfo :

Invoice Not Paid	: 0.0000
SO Pending	: 0.0000
Overdue	: 0.0000
CreditLimit	: 0.0000
OD persen	: 0.0000
Allowed OD	: 0.0000
Remaining Credit : 0.0000	

Step 3: Detail the Order Items

In the **List of Goods/Services** detail table, enter or verify all the items being ordered:

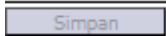

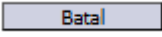
- Fill in the **Item/Service Code**, **Qty** (Quantity), **Unit Price**, and **Discount (%)** if any.

Step 4: Add Miscellaneous Charges (If Any)

If there are other costs outside of the item price (e.g., shipping or insurance), use the **Add MiscellaneousCharge** section below the item list to add them.

Step 5: Save and Confirm

After all data is filled in, use the buttons in the bottom-left section:

- **Save:** To save the SO as a draft. 
- **Confirm:** To finalize and send the SO into the approval workflow. 
- **Cancel:** To cancel the entry. 

Tips & Important Notes

- Creating an SO from a **Source document** like a Quotation or Sales Contract is the **best practice** to ensure consistency in prices and terms.
- An approved SO is the **official instruction** for the Warehouse department to process the shipment of goods.
- An SO that has been **Confirmed** will go to the **Sales Order Inbox** to be approved by a manager before it can be processed further.

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