

Datasheet Number & Version	SOP137 Ver1
Based on Software Build No.	12.5.11.12321
Function	Quick Process
Module	Sales
Datasheet Name	Sales Order Quick Process

All new procedures and processes should be checked in a 'Test' environment before being applied to the 'Live' business system. Note that fields marked are mandatory and must have data entered. When commissioning a new module please note that the parameters will need to be set, and reference should be made to datasheet SYS101, System Manager – Module Parameter Settings

## Sales Order Quick Process

### 1. Quick Process Default Options

a.) Within the Sapman System Manager, go to Settings, then the Sales tab. Locate the setting “*Quick Process Defaults*”, then select the required default options of the Sales Order Quick Process.

Sapman System Manager	
Users	General Tasks Design Product Company Quotations Purchase <b>Sales</b> Works Orders MRP EDI Analysis Printers GRN Periods Picking L
Company Profile	Automatically Create Works Orders
License	Tick this box if you want to be prompted to create Works Orders after saving a Sales Order. <input checked="" type="checkbox"/> Automatically Create Works Orders
Audit Trail	Create New Product Tick this box if you want to the ability to create new products when entering a Sales Line <input checked="" type="checkbox"/> Can Create New Products
Datasets	Quick Process Defaults Choose which operations should be selected by default when Quick Processing a Picking List
<b>Settings</b>	<input checked="" type="checkbox"/> Print <input checked="" type="checkbox"/> Despatch <input checked="" type="checkbox"/> Confirm <input checked="" type="checkbox"/> Address Labels <input checked="" type="checkbox"/> Print <input checked="" type="checkbox"/> Print Despatch Note <input checked="" type="checkbox"/> Complete <input checked="" type="checkbox"/> Invoice <input checked="" type="checkbox"/> Post Invoice
Menus	
Report Layouts	
Standard Notes	
Standard Tasks	Quick Process Locked Tick this box if you want to restrict users from changing the actions carried out during Quick Process <input type="checkbox"/> Lock Quick Process Actions
Spooler	
Logs	Picking List Print Sequence Select when a Picking List needs to be printed, if at all <span>Never</span>
Maintenance	Default Depot Choose the Depot to be added to a Sales Order <span>Nothing Selected</span>

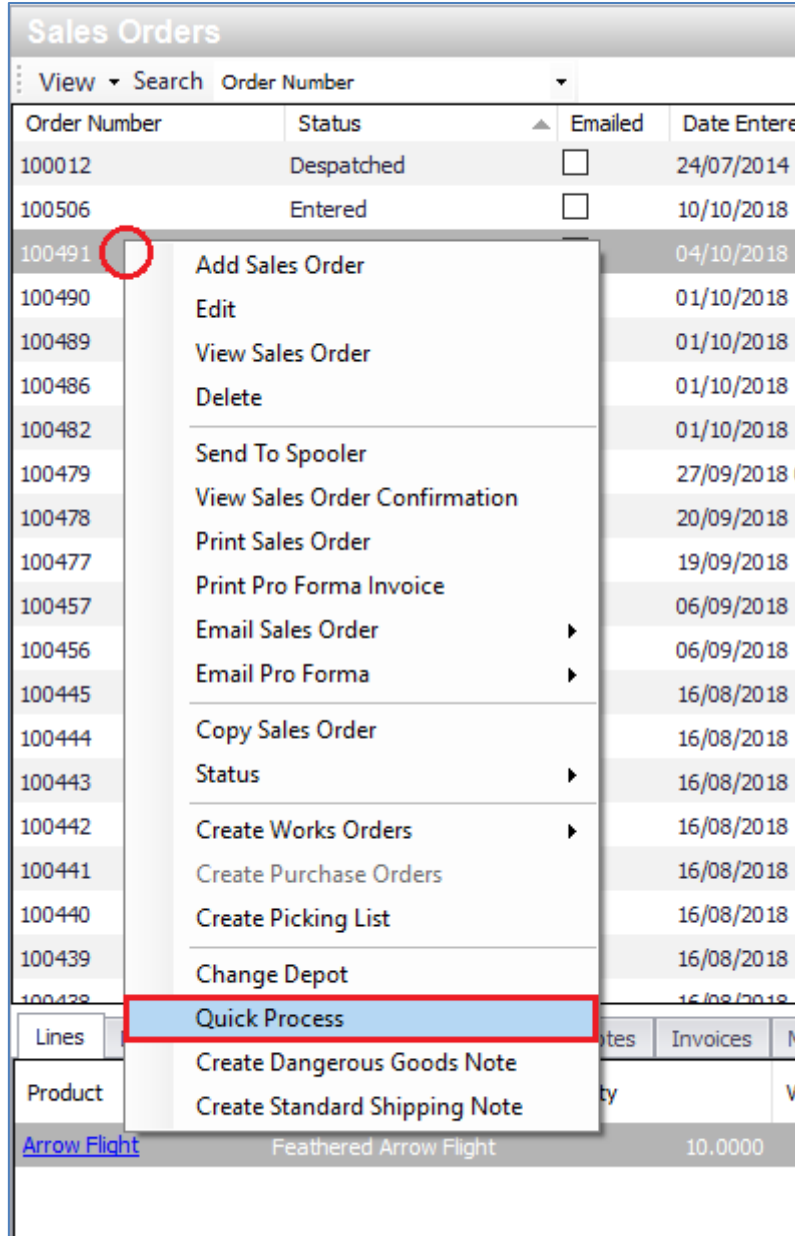
### 2. Processing a Sales Order via Quick Process

a.) Select the Sales module, then select Sales Orders.

Companies	Sales
Tasks	Sales Tasks
<b>Sales</b>	<b>Sales Orders</b>
Purchasing	Picking Lists
Product	Advanced Picking List Manager
Project	Import Picking List Allocations
Design	Reserve Stock
Manufacturing	Create Sales Invoice
EDI	Amend/Post Sales Invoice
MRP	Opportunity Manager
	Quotation Manager
	Sales Forecasts
	Customer Manager
	Credit Requests
	Sales Invoices
	Sales Utilites
	Sales Reports
	Picking List Customer Reference Repo
	Picking List Overview
	Create Picking List Labels
	Import Sales Orders

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b.) Right-click the selected Sales Order, then select Quick Process.



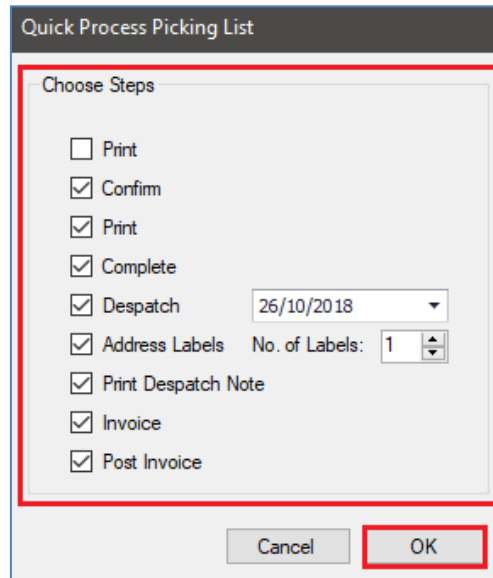
Sales Orders			
Order Number	Status	Emailed	Date Entered
100012	Despatched	<input type="checkbox"/>	24/07/2014
100506	Entered	<input type="checkbox"/>	10/10/2018
100491			04/10/2018
100490			01/10/2018
100489			01/10/2018
100486			01/10/2018
100482			01/10/2018
100479			27/09/2018
100478			20/09/2018
100477			19/09/2018
100457			06/09/2018
100456			06/09/2018
100445			16/08/2018
100444			16/08/2018
100443			16/08/2018
100442			16/08/2018
100441			16/08/2018
100440			16/08/2018
100439			16/08/2018
100438			16/08/2018

- Add Sales Order
- Edit
- View Sales Order
- Delete
- Send To Spooler
- View Sales Order Confirmation
- Print Sales Order
- Print Pro Forma Invoice
- Email Sales Order
- Email Pro Forma
- Copy Sales Order
- Status
- Create Works Orders
- Create Purchase Orders
- Create Picking List
- Change Depot
- Quick Process**
- Create Dangerous Goods Note
- Create Standard Shipping Note

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c.) This will bring up the Quick Process Picking List window. The default options selected in 1. a.) will be selected in this window. At this stage you can tick or untick the required stages of the Quick Process.

When the required fields have been selected, press OK to progress the Quick Process.



d.) The Quick Process will now progress with the Sale Order and complete the stages selected in 2. c.). The user may be required to select custom layouts, depending on what stages are completed. E.g. Picking List layout or Despatch Note layout.

