

How to Create a Sales Order in Acumatica

Hi everyone. I'm Cailee Hanson with SVA Consulting, and in this video, I'll be walking through kind of the sales order process. So we'll really focus on some of the basics for creating a sales order within Acumatica, and then we'll also flow that through to create a shipment and an invoice as well. So that's really what we'll focus on in today's video. I will also note that we have another video available for, really kind of that payment application of an AR invoice. So if you want to see kind of that full circle in that loop closed, I do invite you to watch that video as well. But like I said, we'll focus primarily on creating a sales order today and then creating that shipment and invoice from it.

So to start, I'm going to go ahead and go into my sales order module. And here I can go ahead and begin to create a sales order. So a couple of avenues for creating a sales order, one being this quick tile at the top, so a new sales order, I can go ahead and click into that, and that's automatically going to push me into that order entry screen. I could also hover over this Sales Order menu item, and you'll see that new button pop up. I could go ahead and click that. Again, it's going to prompt me into that Sales Order Entry screen. And then kind of the last avenue, I could click my sales order list, and this is just going to show me my entire list of sales orders within the system. And if I wanted to create a new sales order, I could click this add new records button at the top. So kind of three different avenues for creating a new sales order, and we'll see that kind of consistent through other modules within Acumatica as well.

So I'll go ahead and create a new one just by clicking this new sales order. And like I said, this is just entering me directly into that Sales Order Entry screen. So I can go ahead and create my sales order now, and the first thing it's going to ask me for is this customer record. So a couple of things, I can search by the customer ID or the customer name. So if I know that, I could go ahead and type that in, and then anything that meets that criteria that exists within Acumatica, will go ahead and show up, and we could go ahead and select that. Otherwise, and we'll see this kind of throughout Acumatica as well, but anything that has this search icon I can click on, and this is just giving me that list view of all the customers in my system that again, I could go ahead and select from.

So in this case, I'm going to select this Bright Wave Enterprises. And once I do so, we'll see some general information populate, or default information rather. So their default location, for example, their default contacts. And then if I wanted to override that on the sales order, I could do so as well. So if they wanted to ship to Maine, for example, I could override that. I could override their contact from that primary one to Robert in this case. So both of those options available, but for now, I'll just keep it as is. And then there's some additional optional fields, so I could add in something like a description for this order, an order, customer order number or PO number, I could go ahead and type that in as well, and then you'll also notice that the dates are populating to today's date. But if I wanted to change that requested on date, for example, I could as

well. So I'm going to keep it as is, and we're going to save it. And then we can really start to build up the sales order by adding in the items.

So I'll add new items, kind of two routes. One is by clicking this plus button and add row. And this will allow me to add inventory items, kind of a line-by-line basis. So same thing that we saw on that customer field. We'll notice on this inventory ID field as well. So I can begin to type for either the name or the inventory ID within the system, or like we saw earlier, we can select that little icon, and then we'll see any items within the system as well. We could still search here, you know, we could filter by a certain class. If I just wanted to see consumer products, for example, we can begin to filter there and then select those. So a couple of different options in terms of adding items, but I'll just go ahead and search this based on what I know. And then once I add an item, we'll see all of those defaults on the item we're entering as well, right? So things like the warehouse, the description, that unit of measure, and then the unit price as well, and then I can go ahead and put in a quantity. So maybe I just want to order 50 of these, or this customer is ordering 50 of these. There, I can enter that in, and then we'll see that order total calculating at the top as well.

So I could continue adding different items here. Also note that once I add in an item, we can see the availability on the bottom, so we can see what's available, what's on hand, what's available for shipping, etc., when you're on that specific line item. I can also add items by clicking this Add Items button, and what this will allow is kind of more of a rapid approach for entering in and adding multiple items at once. So I do have different fields that I can search and filter by. So if I had that inventory ID or description, I could put that there, bar coding, if you're leveraging barcoding. If I wanted to search by a specific customer or item class, rather, I could do so as well, and that will filter it down a little bit too. And so once I'm in here, I can see right off the bat, how much I have on hand, how much quantity. And here I have a filter to say, only show me, you know, available items. And so I could multi-select a lot of these, and add these kind of in bulk I wanted to. And then I could add and close. So we'll just maybe add two of these, add and close, and then we can go ahead and press Save. Perfect.

So here I have those added in, and then I can go ahead and create my shipment. So all of this looks good. I could create the shipment. Maybe beforehand, I want to email or print the sales order out, so this could be automated within Acumatica as well. But if I just pressed email sales order, that operation is completed, and we'll see an activity added to the top that's automatically sending an email to the customer. This is a little bit what it would look like here, and then a file attachment to see that sales order printed form as well. Perfect. All right, I'll close out of that, and then we can go ahead and create the shipment.

So I'm going to go ahead press Create Shipment, press Okay, and one thing to know is, you know, you need to have that inventory available to ship in order to create that shipment. So if you do run into any errors, make sure that you have, you know, quantity available to ship, otherwise, if you don't, you'll need to either purchase or transfer some of that inventory so that's there and able to be shipped. So I created this shipment. And then if I go to my Packages tab, you may have some of this populating in automatically based on that item record

setup, but you do need a package to be able to ship this as well. So I'll go to this Packages tab, and then I can just specify what size package do I need, and then what's the weight there as well. And then I could go ahead and press Save.

Another area to know is if you do have shipping carrier integration, that would show up here as well. I could refresh these rates. And then once I do, it's pulling from whichever shipping carriers I'm connected to. So in this case, maybe I want to use FedEx Ground. I've selected that, press OK, and then there I can refresh that and it's ready to go as well. So you may have that set up, you may not, you can kind of do a manual shipping process as well, but just make sure that you do have that package specified when you are creating that shipment. So that looks good, and now I'm going to confirm this shipment. Perfect.

And then, as these kind of buttons indicate, I could also prepare and create that invoice from that shipment as well. So a lot of these steps in terms of creating the shipment and creating the invoice could be automated within the system, so not necessarily having to manually create it every time or on a one-by-one basis. But just for the sake of this demo, I'll just kind of show you that manual process. But again, all of that might be automated within your workflow. Perfect. This is the invoice, and then I'm also able to release it, so I'll go ahead and press release.

So that's kind of the full workflow. Again, you would have access to the areas that you have within Acumatica. So maybe if you weren't supposed to be able to release an invoice, for example, your security profile doesn't allow that, then you wouldn't maybe get to this point. But that is kind of an overview, specifically focusing on how we would create the sales order, and then, if applicable, creating that shipment and invoice as well. So that's kind of the full process there. Hopefully that was helpful in terms of navigating the sales order entry process.

If you have any questions, I definitely recommend reaching out and then, as mentioned earlier, if you're interested in seeing kind of the invoice payment application process, we do have an additional recorded video on that, so I do invite you to check that out, but thank you, I hope that was helpful. Have a good rest of your day.