



Sales: Practical User Scenario

Role: Sales Officer | **Goal:** Create a quotation, convert it to a Sales Order, deliver items, issue an invoice, and track collection — end to end.

STEP-BY-STEP WALKTHROUGH

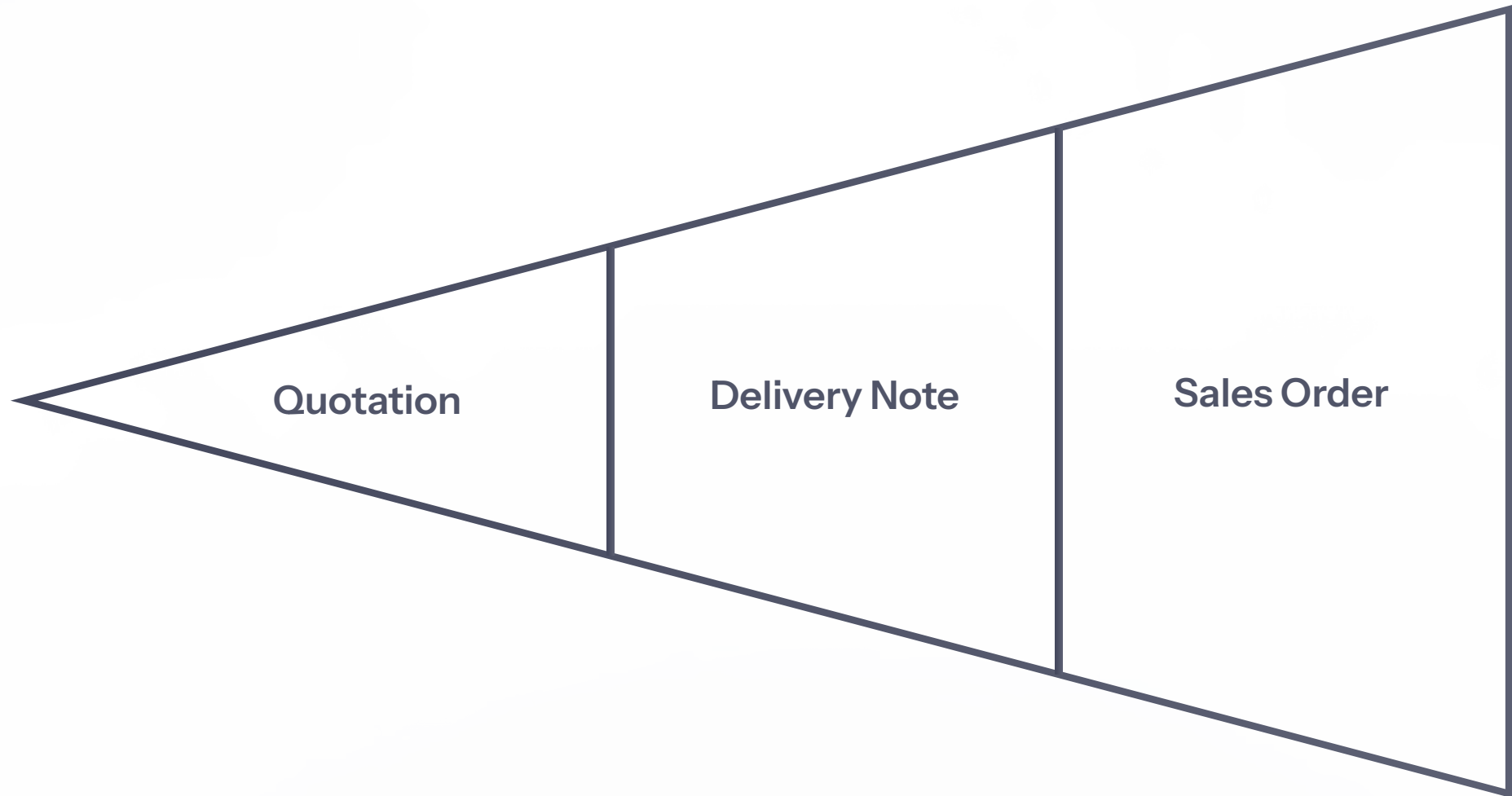
Preconditions



Before You Begin

- Customer master exists (or you have permission to create one)
- Item master exists with selling UOM and price list
- Access to: Quotation, Sales Order, Delivery Note, Sales Invoice, Customer

The Sales Cycle at a Glance



Each stage is linked — documents are created directly from the previous step using the **Make** button, ensuring full traceability throughout the cycle.

Steps 1 & 2 — Workspace & Customer

Step 1 — Sales Workspace

Go to the **Selling** workspace. Sales KPIs, shortcuts, and recent transactions appear.

Step 2 — Create Customer

Open **Customer** → **New** → fill name, territory, tax category → **Save**.
Customer record is created.



Steps 3 & 4 — Quotation to Sales Order



Step 3 — Create a Quotation

Open **Quotation** → **New** → add customer, items, quantities, price list → **Save** → **Submit**.

Quotation is submitted with totals and taxes (if configured).

Step 4 — Convert to Sales Order

From the quotation, click **Make** → **Sales Order** → **Save** → **Submit**. Sales Order is created and linked to the Quotation.

Step 5 — Reserve / Check Stock

 This step is optional but strongly recommended before creating a Delivery Note.

Action

From the Sales Order, review item availability via the stock ledger or item dashboard.

Expected Output

Confirm exactly what quantity can be delivered before proceeding to fulfillment.



Step 6 — Create Delivery Note

From the Sales Order, click **Make** → **Delivery Note** → set warehouse, configure pick/pack if used → **Save** → **Submit**.

- ✓ Delivery Note submitted — stock is automatically reduced from the warehouse.

Steps 7 & 8 — Invoice & Payment

Step 7 — Sales Invoice

From Sales Order or Delivery Note → **Make** → **Sales Invoice** → **Save** → **Submit**. Invoice is posted to accounting; outstanding amount is calculated.

Step 8 — Record Payment

Open **Payment Entry** → **Receive** → choose customer and invoice → **Submit**. Invoice outstanding becomes zero (or reduced); GL entries are created.

Step 9 — Validate Results



Action

Open **Customer** → check outstanding balance, Sales Invoice list, and all related documents.

Expected Output

Full traceability confirmed across the document chain:

- Quotation → Sales Order
- Sales Order → Delivery Note
- Delivery Note → Sales Invoice → Payment



Final Result

Complete Sell Cycle

Fully posted to both **inventory** and **accounting**.

Traceable Document Chain

Every document linked — from quotation through payment.

Updated Receivables

Customer outstanding balance reflects all transactions in real time.