

SALES AND STOCK CONTROL (SSC)

WEB USER GUIDE

SALES & DELIVERY



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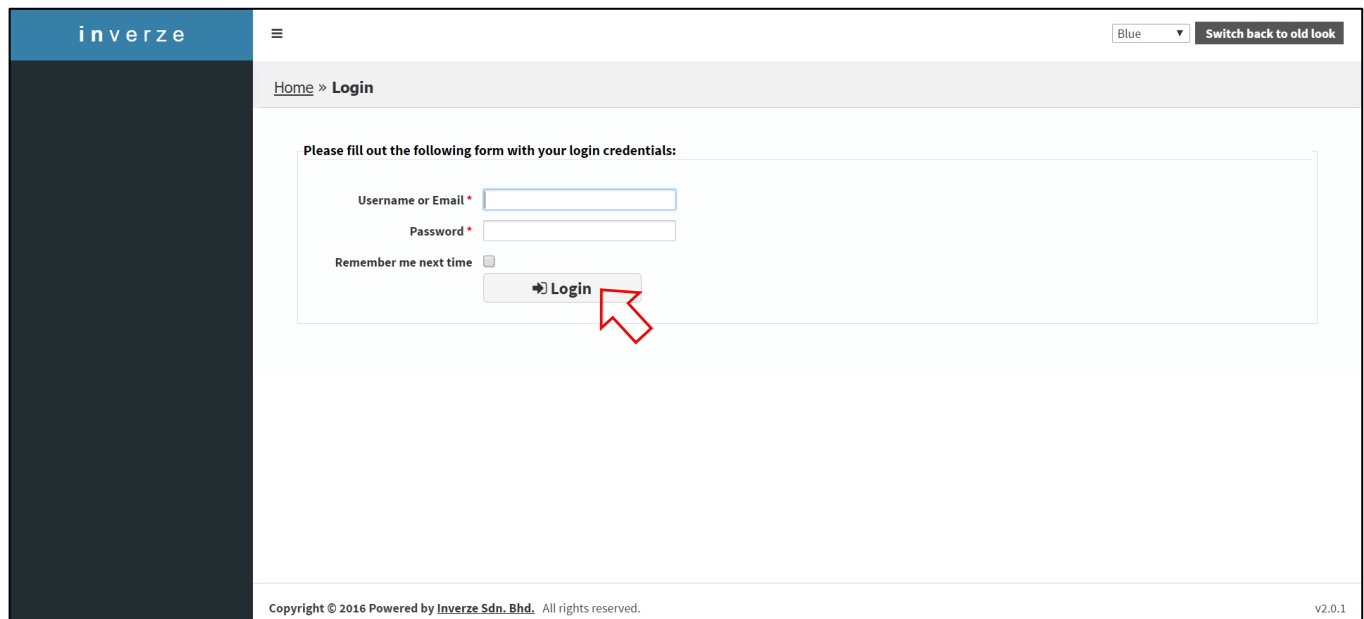
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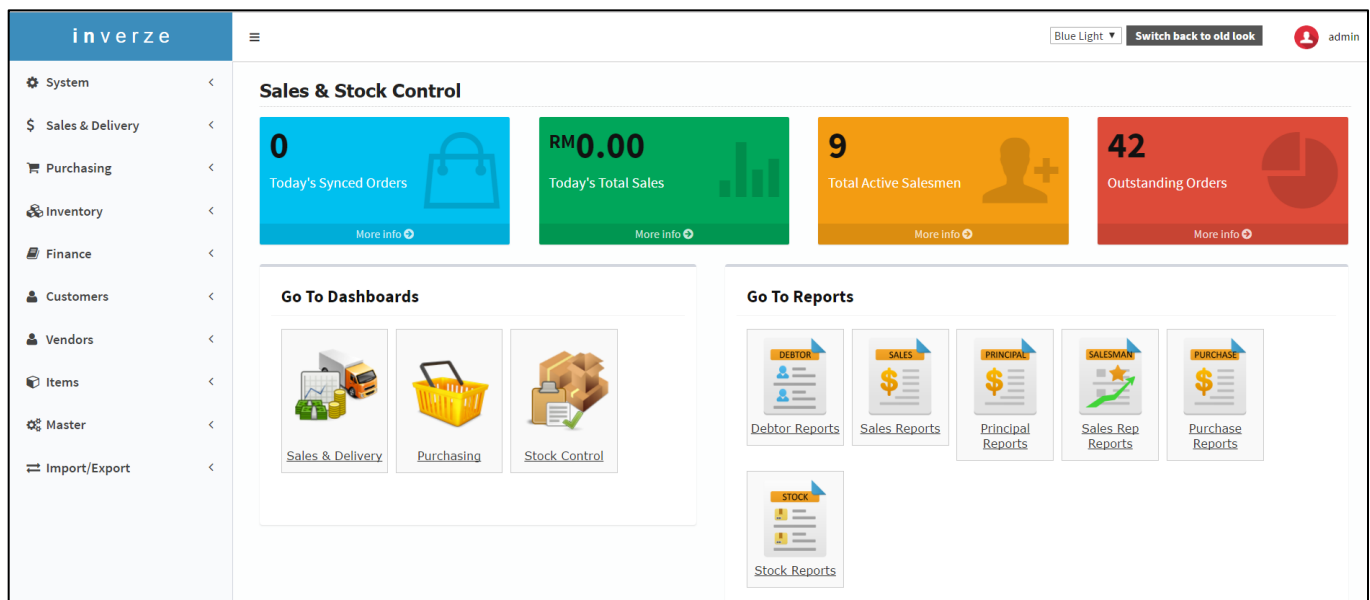
ACCESS SSC



1. Google Chrome is the recommended web browser to use SSC.
2. Type _____ at the URL bar.

The image shows the Inverze login page. The header has the "inverze" logo on the left and a "Blue" theme selector and "Switch back to old look" button on the right. Below the header, there's a "Home » Login" breadcrumb. The main content area has a form titled "Please fill out the following form with your login credentials:". The form contains fields for "Username or Email" and "Password", a "Remember me next time" checkbox, and a "Login" button. A red arrow points to the "Login" button. The footer contains copyright information: "Copyright © 2016 Powered by Inverze Sdn. Bhd. All rights reserved." and the version "v2.0.1".

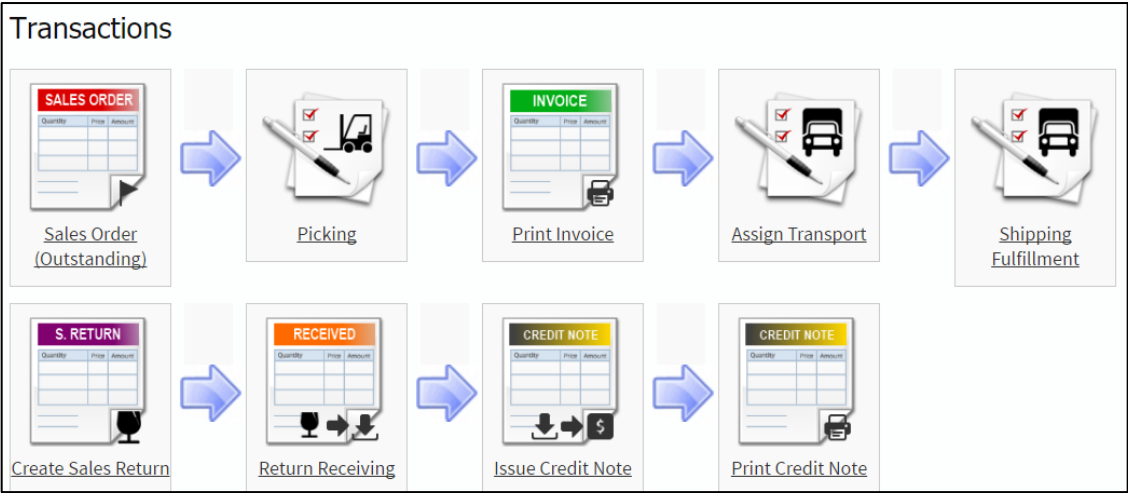
3. Type in username and password. Then click Login.

The image shows the Inverze dashboard after login. The header has the "inverze" logo, a "Blue Light" theme selector, a "Switch back to old look" button, and a user profile icon labeled "admin". The left sidebar contains a menu with items: System, Sales & Delivery, Purchasing, Inventory, Finance, Customers, Vendors, Items, Master, and Import/Export. The main content area is titled "Sales & Stock Control" and features four large cards: "0 Today's Synced Orders", "RM0.00 Today's Total Sales", "9 Total Active Salesmen", and "42 Outstanding Orders". Below these cards, there are two sections: "Go To Dashboards" with icons for Sales & Delivery, Purchasing, and Stock Control; and "Go To Reports" with icons for Debtor Reports, Sales Reports, Principal Reports, Sales Rep Reports, Purchase Reports, and Stock Reports.

4. The Login Page, click to access any Dashboards or Reports.

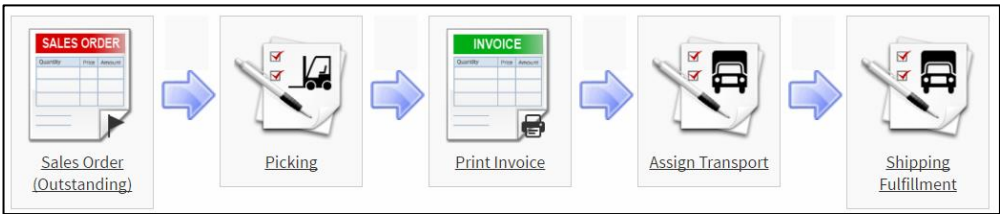
SALES & DELIVERY

1. Transactions

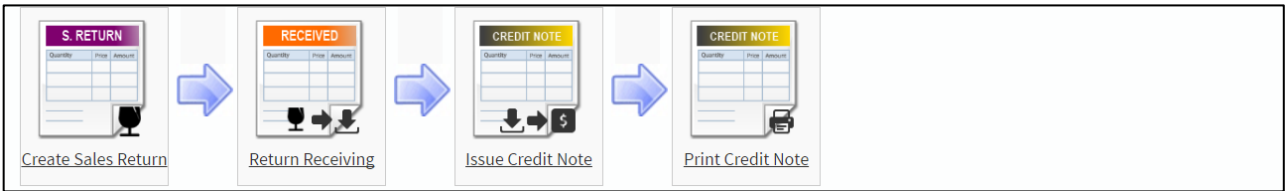


1. There are 2 transaction flows:

a) Sales Order Processing:

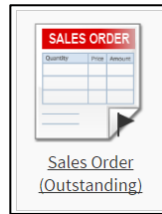


b) Sales Return Processing:



a. Sales Order Processing

Sales Order (Outstanding)



i. Web Create Sales Order

Home » Sales & Delivery » Sales Order » Outstanding

Manage Sales Order (Outstanding)

Division: SUN Description: SUN SDN. BHD.
Company Name: XXX TRADING SDN BHD

PreCheck Stock Batch Confirm

Sales Team: ALL Search

Preview Draft(Excel) | Batch print | **Create**

Displaying 1-37 of 37 results.

Tag	Brand	Area	S/M	Customer	Doc. No	Date	Created	Remark	Net Amount (RM)	Prt
1	E101	-	S01 TAN LEE YONG	308G/098 - GREAT GREAT MART SDN BHD	SO0700016	10/Apr	2016-04-10 22:05:09		890.40	N Draft 3
2	E101	-	S01 TAN LEE YONG	308G/098 - GREAT GREAT MART SDN BHD	SO0700017	10/Apr	2016-04-10 22:43:04		1,113.00	N WIP 9

1. Click Create.

Home » Sales & Delivery » Sales Order » Create

Create Sales Order

Document section

Doc. No * SO0700040 SO/07 (Latest doc no.)
Your Ref.
Order Type * Web Date * 09-11-2016
Status Draft Type CREDIT
Company * XXX TRADING SDN BHD Division * SUN
Description * Sales Order Project *
Remark 01
Remark 02

Customer section

Customer *
Salesman * yokechee YOKE CHEE
Currency * 1.0000
Term *
Branch (none) Area
Delivery Address
Delivery Attention
Delivery Phone 01
Delivery Fax 01

Save & Continue Cancel

- Under Document Section, fill in:
Your Ref. – any reference number (if any)
Remark 1 – any remark (if any)
Remark 2 – any remark (if any)

Customer section

Customer *

Salesman *

Currency * **308G/098** GREAT GREAT MART SDN BHD 308G/098

Term * **308G/098A** GREAT GREAT MART SDN BHD SRI PETALING

Branch

3. Under Customer Section, select customer.

Customer section

Customer * **308G/098** GREAT GREAT MART SDN BHD 308G/098 (GREAT)

Salesman * **S02** AERON CHAN

Currency * RM 1.0000

Term * 14DAYS

Branch Area

Delivery Address 88, JALAN LAPAN
TAMAN LAPAN PULUH
88888 KUALA LUMPUR

Delivery Attention Mr. Tan

Delivery Phone 01 03-19007888 Delivery Fax 01 03-19007800

4. Check the Salesman and change it if needed.

Create Sales Order

Document section

Doc. No * SO0700040 SO/07 (Latest doc no.)

Your Ref. XYZcode

Order Type * Web

Status Draft

Company * XXX TRADING SDN BHD

Description * Sales Order

Remark 01 Testing 123

Remark 02 Testing XYZ

Date * 09-11-2016

Type CREDIT

Division * SUN

Project * -

Customer section

Customer * **308G/098** GREAT GREAT MART SDN BHD 308G/098 (GREAT)

Salesman * **S02** AERON CHAN

Currency * RM 1.0000

Term * 14DAYS

Branch Area

Delivery Address 88, JALAN LAPAN
TAMAN LAPAN PULUH
88888 KUALA LUMPUR

Delivery Attention Mr. Tan

Delivery Phone 01 03-19007888 Delivery Fax 01 03-19007800

Save & Continue Cancel

5. Click Save & Continue.

Sales Order Lines

[Change Location](#) | [Delete selected line\(s\)](#) | [Create new line](#) | [Batch entry](#)

Tag	#	Item	Description	Location	Promo	Qty	UOM	List Price	Price	Disc %	GST	Order Amt	Tax Amt	Net Amt
No results found.														

Discount: 2.00 % 1.00 % 0.00 % 0.00 %

Tax Summary :

Order Amount (RM)	0.0000
Discount Amount (RM)	0.0000
Tax Amount (RM)	0.0000
🟢 Rounding Amt	0.0000
Net Amount (RM)	0.0000

6. Scroll down to bottom, and Sales Order Lines section will appeared.

Sales Order Lines

[Change Location](#) | [Delete selected line\(s\)](#) | [Create new line](#) | [Batch entry](#)

Tag	#	Item	Description	Location	Promo	Qty	UOM	List Price	Price	Disc %	GST	Order Amt	Tax Amt	Net Amt
No results found.														

7. To add items in the Sales Order, click Create New Line or Batch Entry.

Create New Line

Sales Order Line

* 1

Item *

Description

Location * MAIN

Shelf

Batch [New batch](#)

On Hand 0.0000

Reserved Qty 0.0000

Available Qty 0.0000 (on hand - reserved qty)

Price History **Customer Info**

Invoice History

[Previous](#) [Next](#)

Return History

[Previous](#) [Next](#)

Qty 1

UOM * (none) 1.0000

Price 0.0000

Order Amt 0.0000

Discount 0.0000 % 0.0000 % 0.0000 % 0.0000 %

GST (none) 0.00 %

Tax Amt 0.0000

Net Amt 0.0000

Promo

Remark

The item page will show # as the Item number.

Sales Order Line

* 1

Item *

Description

Location *	041042 CHERRY COLA 1 X 12 CANS x 325ml 5573312388333	168,985 (297)
Shelf	041043 MINT COLA 1 X 12 BTL	11,971 (105)
Batch	041044 MINT CUP COLA	65 (26)

In the Item box, type to search the products. Click to select the item.

Item Code = 041042
 Item Description = CHERRY COLA
 Item Packing = 1X12 CANS X 325ml
 Item Barcode = 5573312388333
 Available Stock Balance = 168,985 units
 Reserve Quantity = 297 units

Sales Order Line

* 1

Item * 041042 CHERRY COLA 1 X 12 CANS x 325ml 5573312388333 168,985 (297) ▼

Description CHERRY COLA

Location * MAIN ▼

Shelf ▼

Batch ▼

On Hand 166,818.0000

Available Qty 166,566.0000 (on hand - reserved qty)

Reserved Qty 252.0000

Location

Stock Information

History Information

Price History **Customer Info**

Invoice History

[Previous](#) [Next](#)

IN0700028	2016-10-14	45.00	1	UNIT		1%+2%+3%+4%	40.66	
IN0700028	2016-10-14	5.00	1	UNIT		1%+2%+3%+4%	4.52	
IN0700028	2016-10-14	5.00	1	UNIT		1%+2%+3%+4%	4.52	

Return History

[Previous](#) [Next](#)

After the item chosen, the page will display the stock information and history of the item.

Qty	10	
UOM *	UNIT	1.0000
Price	2.6100	Promo
Order Amt	26.1000	
Discount	0.0000 % 0.0000 % 0.0000 % 0.0000 %	
GST	SR	6.00 %
Tax Amt	1.5700	
Net Amt	27.6700	
Remark		

Fill in Quantity, select UOM, discount if any, and Remark if any.

Qty	10	
UOM *	UNIT	1.0000
Price	2.6100	Promo
Order Amt	26.1000	
Discount	0.0000 % 0.0000 % 0.0000 % 0.0000 %	
GST	SR	6.00 %
Tax Amt	1.5700	
Net Amt	27.6700	
Remark		

Click Create button.

Batch Entry

Batch Create Sales Order Lines [SO0700040]

#	Item	Description	Location	Qty	UOM	Price	Disc %	Tax	Net Amt	
1			MAIN	1		0.0000	0.00 %		0.00	✖
		On Hand Reserved Qty	0 0				0.00 % 0.00 %	0.00		
2			MAIN	1		0.0000	0.00 %		0.00	✖
		On Hand Reserved Qty	0 0				0.00 % 0.00 %	0.00		
3			MAIN	1		0.0000	0.00 %		0.00	✖
		On Hand Reserved Qty	0 0				0.00 % 0.00 %	0.00		
4			MAIN	1		0.0000	0.00 %		0.00	✖
		On Hand Reserved Qty	0 0				0.00 % 0.00 %	0.00		
5			MAIN	1		0.0000	0.00 %		0.00	✖
		On Hand Reserved Qty	0 0				0.00 % 0.00 %	0.00		
16			MAIN	1		0.0000	0.00 %		0.00	✖
		On Hand Reserved Qty	0 0				0.00 % 0.00 %	0.00		
17			MAIN	1		0.0000	0.00 %		0.00	✖
		On Hand Reserved Qty	0 0				0.00 % 0.00 %	0.00		
18			MAIN	1		0.0000	0.00 %		0.00	✖
		On Hand Reserved Qty	0 0				0.00 % 0.00 %	0.00		
19			MAIN	1		0.0000	0.00 %		0.00	✖
		On Hand Reserved Qty	0 0				0.00 % 0.00 %	0.00		
20			MAIN	1		0.0000	0.00 %		0.00	✖
		On Hand Reserved Qty	0 0				0.00 % 0.00 %	0.00		

Create **Cancel**

The page will display 20 lines, fill up all items then click Create button.

Term * 14DAYS

Branch (none) Area -

Delivery Address 88, JALAN LAPAN
TAMAN LAPAN PULUH
88888 KUALA LUMPUR

Delivery Attention Mr. Tan

Delivery Phone 01 03-19007888 Delivery Fax 01 03-19007800

Delete Copy To Sort Promotion Save Confirm Void Close

Sales Order Lines

Change Location | Delete selected line(s) | Create new line | Batch entry

Tag	#	Item	Description	Location	Promo	Qty	UOM	List Price	Price	Disc %	GST	Order Amt	Tax Amt	Net Amt
	1	041042	CHERRY COLA 1 X 12 CANS x 325ml	MAIN		10.00	UNIT	3.7500	5.0000		SR	50.0000	2.9100	51.4200

Discount 2.00 % 1.00 % 0.00 % 0.00 %

Tax Summary :

Code	%	Amount	Tax
SR	6.00	48.51	2.91
			2.91

Order Amount (RM) 50.0000
Discount Amount (RM) 1.4900
Tax Amount (RM) 2.9100
Rounding Amt 0.0000
Net Amount (RM) 51.4200

Print

Return to the Sales Order header page.

Create Promotion Item

To create items with Promotion, click Promotion button.



Select Promotion

Displaying 1-10 of 10 results.

Brand	Code	Description	Valid From	Valid To	Type	Disc By
	300VC	PURCHASE MINIMUM RM300 FOC RM10 VOUCHER	01-01-2016	31-12-2016	V	
	BasketValue-Test	Basket Value - price off	01-08-2016	31-12-2017	V	
E101	CHERRYCOLA-2016	CHERRY COLA BUY 20CTN FOC 1 CTN MINT COLA BTL/MINT COLA CUP	10-04-2016	31-12-2016	P	
LB FOOD S	FLEXDISC-312990	MAX DISCOUNT 10%	01-10-2016	31-12-2017	F	
	INDOMIE-MAMAK	INDOMIE GORENG ASLI - MAMAK STORE	01-08-2016	28-02-2017	B	
	INDOMIE-MAMAK-P	INDOMIE GORENG ASLI - MAMAK STORE	01-08-2016	28-02-2017	P	
E101 KOPIKO LB FOOD S OTHER (S)	KOPIKO-0716-DISC	KOPIKO PROMOTION DISCOUNT - JULY 2016	20-07-2016	28-02-2017	Q	
LB FOOD S	QD-MIN288-V2	QTY DISC MIN 288 FOC 48	01-01-2016	31-12-2016	Q	
E101 LB FOOD (S) ZPROMO	SERVICEREBATE	PURCHASE 20 CTN REBATE RM50	01-02-2016	31-12-2016	Q	
E101	SUN-DISPLAY INCENTIVE	BUY 10 CTN - DISCOUNT RM100	19-04-2016	31-01-2017	Q	

Ok Cancel

Tick to select the promotion from the list.

The promotion details page:

Create Sales Order Lines From Promotion [CHERRYCOLA-2016]

Validation

Min Qty 20

Sales Line # 1

Item 041042
Description CHERRY COLA 1 X 12 CANS x 325ml
Packing 1 X 12 CANS x 325ml

Invoice History

2016-10-14	45.00000	1		1%+2%+3%+
2016-10-14	5.00000	1		1%+2%+3%+
2016-10-14	5.00000	1		1%+2%+3%+

Qty 0 CTR
Price / UOM 42.00
Disc % N/A

Location MAIN Shelf
Stock Rotation Expiry Date
Batch No Serial No
On Hand Qty 166818.00 Reserved Qty 252.00

Sales Line # 2 (F.O.C)

Item * 041043 - MINT COLA 1 X 12 BTL
Description MINT COLA 1 X 12 BTL
Packing

Invoice History

2016-01-18	48.00000	2		
2015-11-11	68.40000	4		5%+0%+0%+

Fill in Quantity

Sales Line # 2 (F.O.C)

Item * 041043 - MINT COLA 1 X 12 BTL
Description 041043 - MINT COLA 1 X 12 BTL
Packing 041044 - MINT CUP COLA

Drop down the yellow box to choose the FOC items.

On Hand Qty 547.00 Reserved Qty 2.00

Net Amt 890.40

Create Cancel

Click Create

Home » Sales & Delivery » Sales Order » SO0700040 » Update

✓ 3 lines created with promotion [CHERRYCOLA-2016].

Update Sales Order SO0700040

CREATED : yokechee [2016-11-09 12:46:44]

Document section

Doc. No * SO0700040

Your Ref. XYZcode

Date * 09-11-2016

Order Type * Web

Type CREDIT

A message appeared “3 lines created with promotion [CHERRYCOLA-2016].”

Sales Order Lines

Change Location | Delete selected line(s) | Create new line | Batch entry

Tag	#	Item	Description	Location	Promo	Qty	UOM	List Price	Price	Disc %	GST	Order Amt	Tax Amt	Net Amt
☐	1	041042	CHERRY COLA 1 X 12 CANS x 325ml	MAIN		10.00	UNIT	3.7500	5.0000		SR	50.0000	2.9100	51.4200
☐	2	041042	CHERRY COLA 1 X 12 CANS x 325ml 1 X 12 CANS x 325ml	MAIN	CHERRYCOLA-2016	20.00	CTR	45.0000	42.0000		SR	840.0000	48.9000	863.8700
☐	3	041043	MINT COLA 1 X 12 BTL	MAIN	CHERRYCOLA-2016	1.00	CTR	68.4000	68.4000	100.00	SR	68.4000	0.0000	0.0000
☐	3	12020233	TROPHY VANILLA DAZZLE 24x75ml	MAIN	CHERRYCOLA-2016	2.00	EA	1.9800	1.9800	100.00	SR	3.9600	0.0000	0.0000

Sales Order Lines will show the items and tagged with the Promo Code.

Term * 14DAYS

Branch (none)

Area

Delivery Address
88, JALAN LAPAN
TAMAN LAPAN PULUH
88888 KUALA LUMPUR

Delivery Attention Mr. Tan

Delivery Phone 01 03-19007888

Delivery Fax 01 03-19007800

Delete Copy To Sort Promotion Save Confirm Void Close

Sales Order Lines

Change Location | Delete selected line(s) | Create new line | Batch entry

Tag	#	Item	Description	Location	Promo	Qty	UOM	List Price	Price	Disc %	GST	Order Amt	Tax Amt	Net Amt
☐	1	041042	CHERRY COLA 1 X 12 CANS x 325ml	MAIN		10.00	UNIT	3.7500	5.0000		SR	50.0000	2.9100	51.4200

Discount 2.00 % 1.00 % 0.00 % 0.00 %

Tax Summary :

Code	%	Amount	Tax
SR	6.00	48.51	2.91
			2.91

Order Amount (RM) 50.0000

Discount Amount (RM) 1.4900

Tax Amount (RM) 2.9100

✓ Rounding Amt 0.0000

Net Amount (RM) 51.4200

Footer Discount

At the Sales Order header page, fill in footer discount (if any).

Save or Confirm the Sales Order



Delete – to delete the Sales Order PERMANENTLY in the system.

Copy To – use this to copy the Sales Order as a new Sales Order.

Save – Save the Sales Order as Draft status.

Confirm – the system will check the Stock level/Pricing/Customer Credit:

- Status: Draft - if the customer credit being blocked.
- Status: WIP - if Customer Credit no issue.

Void – to cancel the Sales Order, status will be VOID.

Close – close the Sales Order and return to the Sales Order Outstanding page.

Once done key in items at the Sales Order, click Confirm.

Home » Sales & Delivery » Sales Order » **SO0700040**

✓ Sales order [SO0700040] confirmed. Status = [WIP]

[Click here to go to generate picking list.](#)

\$ View Sales Order SO0700040

CREATED : yokechee [2016-11-09 12:46:44]

Document section

Doc. No *	SO0700040	Date *	09-11-2016
Your Ref.	XYZcode	Type	CREDIT
Order Type *	Web	Division *	SUN
Status	WIP	Project *	-
Company *	XXX TRADING SDN BHD		
Description *	Sales Order		
Remark 01	Testing 123		
Remark 02	Testing XYZ		

Message "Sales Order [xxxxx] confirmed. Status = [WIP]"

Click the link [Click here to go to generate picking list](#) to access to Picking page.

ii. Sales Order with Colors Tag

Tag	Brand	Area	S/M	Customer
☐				OTHER (S) S02 AERON CHAN 308G/099 - GOOD GOOD MART SDN BHD

Tag Legend	
	Data Integrity
	Document Integrity
	Customer Blacklist
	Final Approval
	Division Credit Limit
	Group Credit Limit
	Promotion & Discount
	Pricing
	Stock Allocation

1 approval is compulsory, if ! exclamation mark is shown

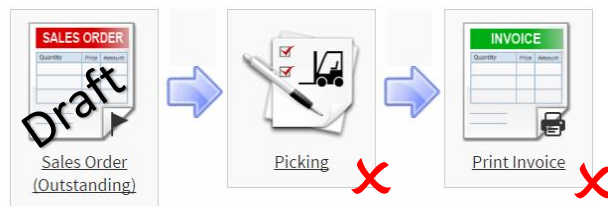
The selling price of the item was below list price (standard selling price). Sales Order (SO Status WIP) will **NOT BE BLOCKED** to generate Sales Invoice, but kindly check the item's selling price to ensure the selling price is correct.



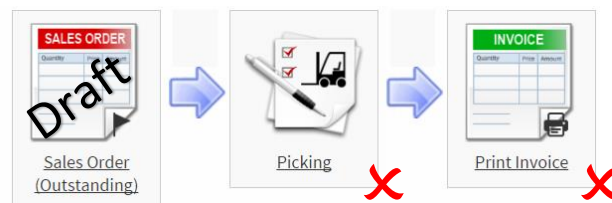
The item was out of stock or insufficient stock level. Sales Order (SO Status WIP) will be **BLOCKED** to generate Sales Invoice. Kindly **EDIT** the sales order or **ADJUST** stock level to proceed sales order to generate sales invoice.



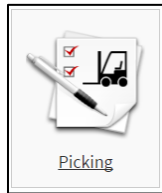
The Sales Order was **BLOCKED** (SO Status Draft) due to customer's credit issue (applicable if sync aging with accounting system is triggered). The Sales Order need to be approved by authorized personnel in order to proceed to generate Picking List.



The Sales Order was **BLOCKED** (SO Status Draft) due to promotion already expired or over promotion allocation.



Picking



Generate Picking List

Picking

Current Division

ALL

- Select the document number set, person and date to be used for creating picking lists.
- Check on document(s) and click on 'Generate selected line(s)' link to generate picking lists.

Document No. Set

PK0900036

Pick Person

admin

Picking Date

09-11-2016

Retag selected line(s)

Check Stock Balance

Sales Order (Status: WIP)

Preview All(PDF)

Preview selected line(s)

Generate selected line(s)

	Brand	Area	S/M	Customer	Doc. No	Date	Remark	Net Amount (RM)	Truck Load (CTN)	Weight (KG)	Prt
1	-	-	S02 AERON CHAN	308G/099 - GOOD GOOD MART SDN BHD 99, JALAN SEMBILAN TAMAN SEMBILAN PULUH 99999 KUALA LUMPUR	SO0700034	12/Sep		13.51	0.25	0.00	N
2	OTHER (S)	-	S01 TAN LEE YONG	308G/098 - GREAT GREAT MART SDN BHD 88, JALAN LAPAN TAMAN LAPAN PULUH 88888 KUALA LUMPUR	SO0700035	21/Sep		102.84	5.00	0.00	N
3	-	-	S02-Test Test WSL	308A/999 - ARZ DISTRIBUTOR SDN BHD A-18-28, 286 JALAN KLANG LAMA, KUALA LUMPUR	CC0700014138	21/Sep		6.68	0.50	0.00	N

1. All Sales Order in Status WIP will appear in Picking page.

Generate Picking List

Picking

Current Division

ALL

- Select the document number set, person and date to be used for creating picking lists.
- Check on document(s) and click on 'Generate selected line(s)' link to generate picking lists.

Document No. Set

PK0900036

Pick Person

admin

Picking Date

09-11-2016

Retag selected line(s)

Check Stock Balance

Preview All(PDF)

Preview selected line(s)

Generate selected line(s)

	Brand	Area	S/M	Customer	Doc. No	Date	Remark	Net Amount (RM)	Truck Load (CTN)	Weight (KG)	Prt
1	-	-	S02 AERON CHAN	308G/099 - GOOD GOOD MART SDN BHD 99, JALAN SEMBILAN TAMAN SEMBILAN PULUH 99999 KUALA LUMPUR	SO0700034	12/Sep		13.51	0.25	0.00	N
2	OTHER (S)	-	S01 TAN LEE YONG	308G/098 - GREAT GREAT MART SDN BHD 88, JALAN LAPAN TAMAN LAPAN PULUH 88888 KUALA LUMPUR	SO0700035	21/Sep		102.84	5.00	0.00	N
3	-	-	S02-Test Test WSL	308A/999 - ARZ DISTRIBUTOR SDN BHD A-18-28, 286 JALAN KLANG LAMA, KUALA LUMPUR	CC0700014138	21/Sep		6.68	0.50	0.00	N

2. Select the picking date or else it is default today date.

Generate Picking List

Picking

Current Division:

- Select the document number set, person and date to be used for creating picking lists.
- Check on document(s) and click on 'Generate selected line(s)' link to generate picking lists.

Document No. Set:

Pick Person: Picking Date:

[Preview All\(PDF\)](#) | [Preview selected line\(s\)](#) | [Generate selected line\(s\)](#)

	Brand	Area	S/M	Customer	Doc. No	Date	Remark	Net Amount (RM)	Truck Load (CTN)	Weight (KG)	Prt
☒	E101	-	S02	308G/098 - GREAT GREAT MART SDN BHD. 88, JALAN LAPAN TAMAN LAPAN PULUH 88888 KUALA LUMPUR	SO0700040	09/Nov	Testing 123 Testing XYZ	915.27	21.92	0.00	N
☒	OTHER (S)	-	S02	308G/099 - GOOD GOOD MART SDN BHD. 99, JALAN SEMBILAN TAMAN SEMBILAN PULUH 99999 KUALA LUMPUR	SO0700041	09/Nov	Testing remark 01 Testing remark 02	190.80	5.00	0.00	N
☐	OTHER (S)	-	S02-	308A/999 - ARZ DISTRIBUTOR SDN BHD. A-18-28, 286 JALAN KLANG LAMA, KUALA LUMPUR	CC0700017138	29/Sep		12.72	0.50	0.00	N

3. Tick the sales order that want to generate picking list.
4. Then, click Generate selected line(s).

Home » Sales & Delivery » Picking List » **Generate Picking List**

✓ Picking list(s) generated.

Generate Picking List

Picking

Current Division:

- Select the document number set, person and date to be used for creating picking lists.
- Check on document(s) and click on 'Generate selected line(s)' link to generate picking lists.

Document No. Set:

Pick Person: Picking Date:

[Preview All\(PDF\)](#) | [Preview selected line\(s\)](#) | [Generate selected line\(s\)](#)

	Brand	Area	S/M	Customer	Doc. No	Date	Remark	Net Amount (RM)	Truck Load (CTN)	Weight (KG)	Prt
☐	1 OTHER (S)	-	S02-	308A/999 - ARZ DISTRIBUTOR SDN BHD. A-18-28, 286 JALAN KLANG LAMA, KUALA LUMPUR	CC0700017138	29/Sep		12.72	0.50	0.00	N

Scroll Down

5. Message appear "Picking list(s) generated."
6. Scroll down to below Picking Lists section.

Picking Lists

- Listing shows all the pending(Draft) picking lists.

Check Stock Balance Invoice Date 09-11-2016 [Preview All\(Excel\)](#) | [Confirm selected line\(s\)](#)

Brand	Area	Pick. Code	Picking Date	Picker	Doc Code	Net Amount (RM)	Truck Load (CTN)	Weight (KG)	Prt Time	Prt
- E101 OTHER (S)	-	PK0900036	09-11-2016	admin	SO0700040 SO0700041	1,106.07	26.92	0.00		No
- A/GBAFM OTHER (S)	-	PK0800008	26-10-2016	admin	SO0800005 SO0800006	1,137.63	16.09	0.00	2016-10-26 16:36:37	Yes
- A/GBAFM OTHER (S)	-	PK0800009	26-10-2016	admin	SO0800007	992.03	16.03	0.00	2016-10-26 16:36:56	Yes
-	-	PK0900034	26-10-2016	admin	SO0800008	139.13	2.92	0.00		No
-	-	PK0900033	21-10-2016	admin	CC0700018134	888.60	20.70	0.00	2016-10-	Yes

7. The sales order that you ticked will generate a picking list.

Picking Lists

- Listing shows all the pending(Draft) picking lists.

Check Stock Balance Invoice Date 09-11-2016 [Preview All\(Excel\)](#) | [Confirm selected line\(s\)](#)

Brand	Area	Pick. Code	Picking Date	Picker	Doc Code	Net Amount (RM)	Truck Load (CTN)	Weight (KG)	Prt Time	Prt
- E101 OTHER (S)	-	PK0900036	09-11-2016	admin	SO0700040 SO0700041	1,106.07	26.92	0.00		No
- A/GBAFM OTHER (S)	-	PK0800008	26-10-2016	admin	SO0800005 SO0800006	1,137.63	16.09	0.00	2016-10-26 16:36:37	Yes
- A/GBAFM OTHER (S)	-	PK0800009	26-10-2016	admin	SO0800007	992.03	16.03	0.00	2016-10-26 16:36:56	Yes
-	-	PK0900034	26-10-2016	admin	SO0800008	139.13	2.92	0.00		No
-	-	PK0900033	21-10-2016	admin	CC0700018134	888.60	20.70	0.00	2016-10-	Yes

Update Picking List Print Picking List

i. Edit Quantity in Picking List

Total 3 results.

Item Code	Description	Location	Shelf	Batch No	Expiry Date	Packing	Case Qty	Loose Qty	Doc No
1 041042	CHERRY COLA	MAIN				12 UNIT	22 CTR	10 UNIT	SO0700040 SO0700041
2 041043	MINT COLA 1 X 12 BTL	MAIN				12 UNIT	1 CTR	0 UNIT	SO0700040
3 12020233	**TROPHY VANILLA DAZZLE 24x75ml	MAIN				24 EA	0 CTN	2 EA	SO0700040

Invoice List

- Please confirm all the invoices in the picking sheet with status (Void/Draft)

[Print Summary List](#) | [Add Sales Order\(s\)](#) | [Hide/Show Document List](#)

Total 2 results.

Doc No	Date	Area	Agent	Customer	Term	Net Amount (RM)	Printed	Status
SO0700040	09-11-2016	-	S02	308G/098 - GREAT GREAT MART SDN BHD	14DAYS	915.27	No	Draft
SO0700041	09-11-2016	-	S02	308G/099 - GOOD GOOD MART SDN BHD	14DAYS	95.40	No	Draft
						1,010.67		

Delete
Print
Close

1. To view the Sales Order summary, click Hide/Show Document List.

View Picking List PK0900036

Document section

Pick. Code
Picking Date

Picking By
Printed ☐

Picking lines

Total 3 results.

Item Code	Description	Location	Shelf	Batch No	Expiry Date	Packing	Case Qty	Loose Qty	Doc No
1 041042	CHERRY COLA	MAIN				12 UNIT	22 CTR	10 UNIT	SO0700040 SO0700041
2 041043	MINT COLA 1 X 12 BTL	MAIN				12 UNIT	1 CTR	0 UNIT	SO0700040
3 12020233	**TROPHY VANILLA DAZZLE 24x75ml	MAIN				24 EA	0 CTN	2 EA	SO0700040

Invoice List

- Please confirm all the invoices in the picking sheet with status (Void/Draft)

[Print Summary List](#) | [Add Sales Order\(s\)](#) | [Hide/Show Document List](#)

Delete
Print
Close

2. To edit the item, click on the Sales Order number that you wish to edit.

Update Delivery Order SO0700040

CREATED : admin [2016-11-09 16:59:41] LAST UPDATED : admin [2016-11-09 16:59:41]

Document section

D/O No * SO0700040
 Your Ref. XYZcode
 Date * 09-11-2016
 Status **Draft**
 Order Type * Pick
 Division * SUN
 Company * XXX TRADING SDN BHD
 Project * -
 Description * Sales Order
 Remark 01 Testing 123
 Remark 02 Testing XYZ

Customer section

Customer * 308G/098 GREAT GREAT MART SDN BHD 308G/098
 Salesman * S02 AERON CHAN
 Currency * RM 1.0000
 Term * 14DAYS
 Branch (none) Area *

Delivery Order Lines

Delete selected line(s) | Create new line

#	Item	Description	Location	Promo	Qty	UOM	List Price	Price	Disc %	GST	Tax Amt	Net Amt
1	041042	CHERRY COLA 1 X 12 CANS x 325ml	MAIN		10.00	UNIT	3.7500	5.0000		SR	2.9100	51.4200
2	041042	CHERRY COLA 1 X 12 CANS x 325ml	MAIN	CHERRYCOLA-2016	20.00	CTR	45.0000	42.0000		SR	48.9000	863.8700
3	041043	MINT COLA 1 X 12 BTL	MAIN	CHERRYCOLA-2016	1.00	CTR	68.4000	68.4000	100.00	SR	0.0000	0.0000
4	12020233	TROPHY VANILLA DAZZLE 24x75ml	MAIN	CHERRYCOLA-2016	2.00	EA	1.9800	1.9800	100.00	SR	0.0000	0.0000

Discount 2.00 % 1.00 % 0.00 % 0.00 %

Tax Summary :

Code	%	Amount	Tax
SR	6.00	863.48	51.81
			51.81

Order Amount (RM) 890.0000
Discount Amount (RM) 26.5200
Tax Amount (RM) 51.8100
Rounding -0.0200
Net Amount (RM) 915.2700

3. It will direct to the Sales Order page.

4. Click  to edit the item.

Delivery Order Lines

Delete Sort Promotion **Save** Close

5. Click Save button once edit done.

✓ Delivery order [SO0700040] saved.

Update Delivery Order SO0700040

CREATED : admin [2016-11-09 16:59:41]

6. Message "Delivery Order [xxxxx] saved."

Delivery Order Lines

Delete Sort Promotion Save **Close**

7. Click Close button.

View Picking List PK0900036

Document section

Pick. Code: PK0900036 Picking Date: 09-11-2016

Picking By: admin Printed: ☐

Picking lines

Total 3 results.

Item Code	Description	Location	Shelf	Batch No	Expiry Date	Packing	Case Qty	Loose Qty	Doc No
1 041042	CHERRY COLA	MAIN				12 UNIT	22 CTR	10 UNIT	SO0700040 SO0700041
2 041043	MINT COLA 1 X 12 BTL	MAIN				12 UNIT	1 CTR	0 UNIT	SO0700040
3 12020233	**TROPHY VANILLA DAZZLE 24x75ml	MAIN				24 EA	0 CTN	2 EA	SO0700040

Invoice List

- Please confirm all the invoices in the picking sheet with status (Void/Draft)

[Print Summary List](#) | [Add Sales Order\(s\)](#) | [Hide/Show Document List](#)

[Delete](#) [Print](#) [Close](#)

- You will be directed back to Picking List page.
- Click Close.

ii. Confirm Picking List to Generate Sales Invoices

Picking Lists

Listing shows all the pending(Draft) picking lists.

[Check Stock Balance](#) Invoice Date: 09-11-2016

[Preview All\(Excel\)](#) | [Confirm selected line\(s\)](#)

Brand	Area	Pick. Code	Picking Date	Picker	Doc Code	Net Amount (RM)	Truck Load (CTN)	Weight (KG)	Prt Time	Prt
-	-	PK0900036	09-11-2016	admin	SO0700040 SO0700041	1,010.67	23.92	0.00	No	
-	A/GBAFM OTHER (S)	PK0800008	26-10-2016	admin	SO0800005 SO0800006	1,137.63	16.09	0.00	2016-10-26 16:36:37	Yes
-	A/GBAFM OTHER (S)	PK0800009	26-10-2016	admin	SO0800007	992.03	16.03	0.00	2016-10-26 16:36:56	Yes

- Choose the Invoice Date or else default to today Date.

Picking Lists

Listing shows all the pending(Draft) picking lists.

[Check Stock Balance](#) Invoice Date: 09-11-2016

[Preview All\(Excel\)](#) | [Confirm selected line\(s\)](#)

Brand	Area	Pick. Code	Picking Date	Picker	Doc Code	Net Amount (RM)	Truck Load (CTN)	Weight (KG)	Prt Time	Prt
-	-	PK0900036	09-11-2016	admin	SO0700040 SO0700041	1,010.67	23.92	0.00	No	
-	A/GBAFM OTHER (S)	PK0800008	26-10-2016	admin	SO0800005 SO0800006	1,137.63	16.09	0.00	2016-10-26 16:36:37	Yes
-	A/GBAFM OTHER (S)	PK0800009	26-10-2016	admin	SO0800007	992.03	16.03	0.00	2016-10-26 16:36:56	Yes

- Tick the Picking number that want to confirm as Sales Invoice.
- Click Confirm selected line(s).

✓ Picking list(s) confirmed and sales invoice(s) have been generated.

[Click here to go to sales invoice list.](#)



Generate Picking List

Picking

4. Message "Picking List(s) confirmed and sales invoice(s) have been generated."
5. Click the link [Click here to go to sales invoice list](#) to access to Manage Invoice page.

iii. Split Sales Order

Picking

Current Division:

- Select the document number set, person and date to be used for creating picking lists.
- Check on document(s) and click on 'Generate selected line(s)' link to generate picking lists.

Document No. Set:

Pick Person:

Picking Date:

[Preview All\(PDF\)](#) | [Preview selected line\(s\)](#) | [Generate selected line\(s\)](#)

	Brand	Area	S/M	Customer	Doc. No	Date	Remark	Net Amount (RM)	Truck Load (CTN)	Weight (KG)	Prt
☐											
☐	1	-	S02	308G/099 - GOOD GOOD MART SDN BHD. 99, JALAN SEMBILAN TAMAN SEMBILAN PULUH 99999 KUALA LUMPUR	SO0700034	12/Sep		13.51	0.25	0.00	N
☐	2	OTHER (S)	S01	308G/098 - GREAT GREAT MART SDN BHD. 88, JALAN LAPAN TAMAN LAPAN PULUH 88888 KUALA LUMPUR	SO0700035	21/Sep		102.84	5.00	0.00	N

1. Under section Picking, click button at Sales Order.

Split Sales Order By Lines

Doc. No:

Date:

Customer:

[Clear All Qty](#)

#	Tag	Item	Description	Promo	Price	Net Amt	Odr Qty	UOM	Qty to send
1		041042	CHERRY COLA 1 X 12 CANS x 325ml 1 X 12 CANS x 325ml	300VC	45.0000	93.49	2	CTR	2
2		041043	MINT COLA 1 X 12 BTL	300VC	5.7000	0.00	2	UNIT	2
3		VC01	VOUCHER RM10	300VC	0.0000	0.00	2	UNIT	2

2. Fill in Quantity that want to split out to another Sales Order.

Split Sales Order By Lines

Doc. No

Date

Customer

[Clear All Qty](#)

#	Tag	Item	Description	Promo	Price	Net Amt	Odr Qty	UOM	Qty to send
1		<u>041042</u>	CHERRY COLA 1 X 12 CANS x 325ml 1 X 12 CANS x 325ml	300VC	45.0000	93.49	2	CTR	2
2		<u>041043</u>	MINT COLA 1 X 12 BTL	300VC	5.7000	0.00	2	UNIT	0
3		<u>VC01</u>	VOUCHER RM10	300VC	0.0000	0.00	2	UNIT	0

3. Example to split item 1 to another Sales Order. Item 2 and 3, filled 0.

Split Sales Order By Lines

Doc. No

Date

Customer

[Clear All Qty](#)

#	Tag	Item	Description	Promo	Price	Net Amt	Odr Qty	UOM	Qty to send
1		<u>041042</u>	CHERRY COLA 1 X 12 CANS x 325ml 1 X 12 CANS x 325ml	300VC	45.0000	93.49	2	CTR	2
2		<u>041043</u>	MINT COLA 1 X 12 BTL	300VC	5.7000	0.00	2	UNIT	0
3		<u>VC01</u>	VOUCHER RM10	300VC	0.0000	0.00	2	UNIT	0

4. Click Split.

www.inverze.com says:

Confirm to split this document?

5. Click OK.

✓ Sales order [CC0700021138#1] generated. Status = [Draft]

Generate Picking List

Picking

Current Division

- Select the document number set, person and date to be used for creating picking lists.
- Check on document(s) and click on 'Generate selected line(s)' link to generate picking lists.

- Another Sales Order will be generated and the number is same with the Split Sales Order and ending with "#1".
- Both Sales Order also at Status **DRAFT**.
- Return to Sales Order (Outstanding) page to find the Sales Order.

Manage Sales Order (Outstanding)

Division: Description: Company Name:

Sales Team:

[Preview Draft\(Excel\)](#) | [Batch print](#) | [Create](#)

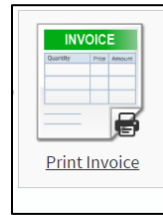
Displaying 1-2 of 2 results.

Tag	Brand	Area	S/M	Customer	Doc. No	Date	Created	Remark	Net Amount (RM)	Prt
☐	1	-	-	S02-Test Test WSL	308G/099 - GOOD GOOD MART SDN BHD	CC0700021138	11/Nov	2016-11-11 00:13:46	0.00	N Draft 2
☐	2	-	-	S02-Test Test WSL	308G/099 - GOOD GOOD MART SDN BHD	CC0700021138#1	11/Nov	2016-11-13 10:39:39	93.49	N Draft 1
									93.49	

- Edit the Sales Order.

Print Invoice

i. Print Invoice (Print Sales Invoice in Batch)



Home » Sales & Delivery » Sales Invoice » **Print Sales Invoice (Batch)**

Print Sales Invoice (Batch)

Division: Description: Company Name:

Search

Order Type: Customer: Salesman Code: Document No: To: Picking Code: Shipment Code: Date From: to Status: ☒ WIP ☒ Completed Is Printed: Mode:

Preview **Export to PDF**

1. Choose the Sales Invoice Date.
2. Is Printed:
 - a. No, to print all invoices that not yet print before
 - b. Yes, to print all invoices that already printed before
3. Click Preview button.

Search

Order Type: Customer: Salesman Code: Document No: To: Picking Code: Shipment Code: Date From: to Status: ☒ WIP ☒ Completed Is Printed: Mode:

Preview **Export to PDF**

Total 2 results.

☒	Inv. No	Pick. Code	Ship. Code	Date	Agent	Customer	Division	Area	Net Amount (RM)	Printed
☒	IN0700030	PK0900036		09-11-2016	S02	308G/099 - GOOD GOOD MART SDN BHD	SUN	-	95.40	No
☒	IN0700029	PK0900036		09-11-2016	S02	308G/098 - GREAT GREAT MART SDN BHD	SUN	-	915.27	No
									1,010.67	

4. The list of sales invoices will be showed.
5. Tick the invoices that want to print in batch.

Search

Order Type

NORMAL

Customer

Salesman Code

ALL

Document No

To

Picking Code

Shipment Code

Date From

01-10-2016

to

30-11-2016

Status

☒ WIP

☒ Completed

Is Printed

NO

Mode

FOLLOW SETTING

Preview

Export to PDF

Total 2 results.

☒	Inv. No	Pick. Code	Ship. Code	Date	Agent	Customer	Division	Area	Net Amount (RM)	Printed
☒	IN0700030	PK0900036		09-11-2016	S02	308G/099 - GOOD GOOD MART SDN BHD	SUN	-	95.40	No
☒	IN0700029	PK0900036		09-11-2016	S02	308G/098 - GREAT GREAT MART SDN BHD	SUN	-	915.27	No
									1,010.67	

6. Click Export to PDF button.

7. A pdf file will be downloaded. Open the pdf file and print invoices in batch.

b. Sales Return Processing

Create Sales Return



Home » Quick Create Document

Quick Create Document

To quickly create a document, please choose the **document type** and **division**, and click on 'Create' button.

Document type: SR - Sales Return

Division: SUN

Create Cancel

1. Select the Division, click Create.

Create Sales Return

Document section

Doc Code: SR0700001 SR/07 (Latest doc no.)

Ref Code: [Yellow Highlighted]

Date: 13-11-2016

Order Type: Web

Status: Draft

Division: SUN

Company: XXX TRADING SDN BHD

Project: -

Description: Sales Return

Remark 01: [Yellow Highlighted]

Remark 02: [Yellow Highlighted]

Customer section

Customer: [Dropdown]

Salesman: admin Administrator Admin

Currency: 1.0000

Term: [Dropdown]

Branch: (none) Area: [Dropdown]

Del Address 01: [Text Area]

Del Attention: [Text Area]

Del Phone 01: [Text Area]

Del Fax 01: [Text Area]

Save & Continue Cancel

2. Document Section, fill in:
Ref Code – GRN/TRN number/or any reference code (if any)
Remark 01 – any remark (if any)
Remark 02 – any remark (if any)

Customer section

Customer: [Dropdown]

Salesman: gre

Currency: 308G/098 GREAT GREAT MART SDN BHD 308G/098

Term: 308G/098A GREAT GREAT MART SDN BHD SRI PETALING

Branch: [Dropdown]

3. Under Customer Section, select customer.

Create Sales Return

Document section

Doc Code * SR0700001 SR/07 (Latest doc no.)
 Ref Code GRN0001
 Date * 13-11-2016
 Order Type * Web Status Draft
 Division * SUN Company * XXX TRADING SDN BHD
 Project *
 Description * Sales Return
 Remark 01 Testing Remark 1
 Remark 02 Testing Remark 2

Customer section

Customer * 3086/098 GREAT GREAT MART SDN BHD 3086/098
 Salesman * S01 TAN LEE YONG
 Currency * RM 1.0000
 Term * 14DAYS
 Branch Area *
 Del Address 01 88, JALAN LAPAN
 TAMAN LAPAN PULUH
 88888 KUALA LUMPUR
 Del Attention
 Del Phone 01 03-19007888 Del Fax 01 03-19007800

Save & Continue Cancel

4. Check and change the Salesman (if needed).
5. Click Save & Continue.

Home » Sales & Delivery » Sales Return » SR0700001 » Update

✓ Sales return [SR0700001] created. Please continue to create the lines.

Update Sales Return SR0700001

CREATED : admin [2016-11-13 08:37:38] LAST UPDATED : admin [2016-11-13 08:37:38]

Document section

Doc Code * SR0700001
 Ref Code GRN0001
 Date * 13-11-2016
 Order Type * Web Status Draft
 Division * SUN Company * XXX TRADING SDN BHD
 Project *
 Description * Sales Return
 Remark 01 Testing Remark 1
 Remark 02 Testing Remark 2

6. Message "Sales Return [xxxxxx] created. Please continue to create the lines."

Sales Return Lines

Delete selected line(s) | Create new line | Batch entry

Tag	#	Item	Description	Location	Reason	Qty	UOM	List Price	Price	Disc %	GST	Tax Amt	Net Amt
No results found.													

Discount 0.00 % 0.00 % 0.00 % 0.00 %

Tax Summary :

Order Amount (RM)	0.0000
Discount Amount (RM)	0.0000
Tax Amount (RM)	0.0000
Rounding Amt	0.0000
Net Amount (RM)	0.0000

7. Scroll down to bottom, and Sales Return Lines section will appeared.

Sales Return Line

* 1

Item * 041042 CHERRY COLA 1 X 12 CANS x 325ml 5573312388333 168,711 (141) ▾

Description CHERRY COLA

ETD 13-11-2016   **Location**

Location * XMAIN ▾

Shelf ▾

Batch ▾ [New batch](#)

On Hand 0.0000 

Stock Rotation - ▾

Reserved Qty 0.0000

8. Check the Location.

Sales History Information

Previous Next

IN0700029	2016-11-09	5.0000	10	UNIT	SR		2%+1%+0%+0%	48.51	S02	Refer
IN0700029	2016-11-09	42.0000	20	CTR	SR		2%+1%+0%+0%	814.97	S02	Refer
IN0700028	2016-10-14	45.0000	1	UNIT	SR		1%+2%+3%+4%	40.66	S01	Refer

Invoice Ref. REF INV: IN0700028 DATE:2016-10-14 

9. Click Refer to fill Invoice Ref. number.

10. Click Previous/Next button to find Invoices.

Reason * - - ▾

Qty (none)

UOM * - -

Price A REJECTED

Order Amt B DAMAGED

Discount C EXPIRED

GST D WRONG STOCK

E EMPTY BOTOL

F SHORT DELIVERED

G SLOW MOVING

11. Select Reason from drop-down menu.

Qty 10

UOM * UNIT ▾ 1.0000

Price 2.6100

Order Amt 26.1000

Discount 0.00 % 0.00 % 0.00 % 0.00 %

GST SR ▾ 6.00 %

Tax Amt 1.5700

Net Amt 27.6700

Additional Remark

12. Fill in Quantity, select UOM, discount if any, and Remark if any.

Qty

UOM *

Price

Order Amt

Discount % % % %

GST %

Tax Amt

Net Amt

Additional Remark

13. Click Create button.

14. Continue to create other items.

Sales Return Lines

[Delete selected line\(s\)](#) | [Create new line](#) | [Batch entry](#)

Tag	#	Item	Description	Location	Reason	Qty	UOM	List Price	Price	Disc %	GST	Tax Amt	Net Amt
☐	1	041042	CHERRY COLA 1 X 12 CANS x 325ml REF INV: IN0700028 DATE:2016-10-14	XMAIN	C	10.00	UNIT	3.7500	2.6100		SR	1.5700	27.6700

Discount % % % %

Tax Summary :

Code	%	Amount	Tax
SR	6.00	26.10	1.57
			1.57

Order Amount (RM)

Discount Amount (RM)

Tax Amount (RM)

Rounding Amt

Net Amount (RM)

15. Once done, click Cancel button to return to Document header page.

16. Check the Sales Return Lines details.

17. Click Save (if want to save as Draft Status only), or Click Confirm to confirm the Sales Return as WIP Status.

[Home](#) » [Sales & Delivery](#) » [Sales Return](#) » [SR0700001](#) » [View](#)

✓ Sales return [SR0700001] confirmed. Status = [WIP]

View Sales Return SR0700001

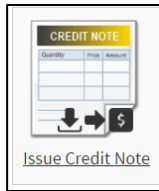
CREATED : admin [2016-11-13 08:37:38] LAST UPDATED : admin [2016-11-13 09:01:39]

Document section

Doc Code *

18. Message "Sales Return [xxxxx] confirmed. Status = [WIP]"

Issue Credit Note



\$ Issue C/N From Return Received

Division: **SUN** Description: **SUN SDN. BHD.**
 Company Name: **XXX TRADING SDN BHD**

Search

- Fill in customer if you would like to filter documents on a specified customer only.

Customer: **Search**

1. Select Division.

Issue C/N From Return Received

- Select the document number set to be used for creating credit notes.
- Tick on document(s) and click on 'Transfer selected line(s)' link to generate credit notes.

Document No. Set: **CN070001C** C/ N Date: **Transfer selected line(s)**
 Displaying 1-1 of 1 result.

Receipt No	Ref Code	Doc Date	Salesman	Customer	Area	Net Amount (RM)	Status	Actions
☐ RR0700002	GRN0001	13-11-2016	S01	308G/098 - GREAT GREAT MART SDN BHD	-	27.67	WIP	
						27.67		

2. All Sales Return in Status WIP will appear in Issue C/N From Sales Return section.

Issue C/N From Return Received

- Select the document number set to be used for creating credit notes.
- Tick on document(s) and click on 'Transfer selected line(s)' link to generate credit notes.

Document No. Set: **CN070001C** C/ N Date: **Transfer selected line(s)**
 Displaying 1-1 of 1 result.

Receipt No	Ref Code	Doc Date	Salesman	Customer	Area	Net Amount (RM)	Status	Actions
☐ RR0700002	GRN0001	13-11-2016	S01	308G/098 - GREAT GREAT MART SDN BHD	-	27.67	WIP	
						27.67		

Calendar Overlay: Nov 2016. Today: 13. Done.

3. Select C/N Date.

Issue C/N From Return Received

- Select the document number set to be used for creating credit notes.
- Tick on document(s) and click on 'Transfer selected line(s)' link to generate credit notes.

Document No. Set * C/ N Date  

[Transfer selected line\(s\)](#)
Displaying 1-1 of 1 result.

☒	Receipt No	Ref Code	Doc Date	Salesman	Customer	Area	Net Amount (RM)	Status	Actions
☒	RR0700002	GRN0001	13-11-2016	S01	308G/098 - GREAT GREAT MART SDN BHD	-	27.67	WIP	
							27.67		

4. Tick the Sales Return that want to generate Sales Credit Note.
5. Click Transfer selected line(s).

✔ Credit note(s) generated.

\$ Issue C/N From Return Received

Division Description Company Name

Search

- Fill in customer if you would like to filter documents on a specified customer only.

Customer 

Issue C/N From Return Received

- Select the document number set to be used for creating credit notes.
- Tick on document(s) and click on 'Transfer selected line(s)' link to generate credit notes.

Scroll Down

6. Message "Credit note(s) generated."
7. Scroll down to bottom Credit Note section.

Credit Notes

- Listing shows all the existing credit notes in status of WIP.

Draft
[Confirm selected line\(s\)](#)
Displaying 1-1 of 1 result.

☐	C/ N No	Ref Code	Doc Date	Salesman	Customer	Area	Net Amount (RM)	Status	Actions
☐	CN0700010	GRN0001	13-11-2016	S01	308G/098 - GREAT GREAT MART SDN BHD	-	27.67	Draft*	
							27.67		

8. Credit Note at status Draft.

Credit Notes

- Listing shows all the existing credit notes in status of WIP.

Confirm selected line(s)

Displaying 1-1 of 1 results

☒	C/N No	Ref Code	Doc Date	Salesman	Customer	Area	Net Amount (RM)	Status	Actions
☒	CN0700010	GRN0001	13-11-2016	S01	308G/098 - GREAT GREAT MART SDN BHD	-	27.67	Draft*	
							27.67		

9. Tick the Credit Note that want to Confirm as Completed.

✓ Credit note(s) confirmed.

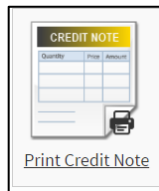
\$ Issue C/N From Return Received

Division: SUN Description: SUN SDN. BHD.

Company Name: XXX TRADING SDN BHD

10. Message "Credit note(s) confirmed."

Print Credit Note



i. Print Credit Note (Print Sales Credit Note in Batch)

\$ Print Credit Note (Batch)

Division

Division: SUN Description: SUN SDN. BHD.

Company Name: XXX TRADING SDN BHD

Search

Customer:

Salesman Code: ALL

Document No: To:

Date From: 01-11-2016 to 30-11-2016

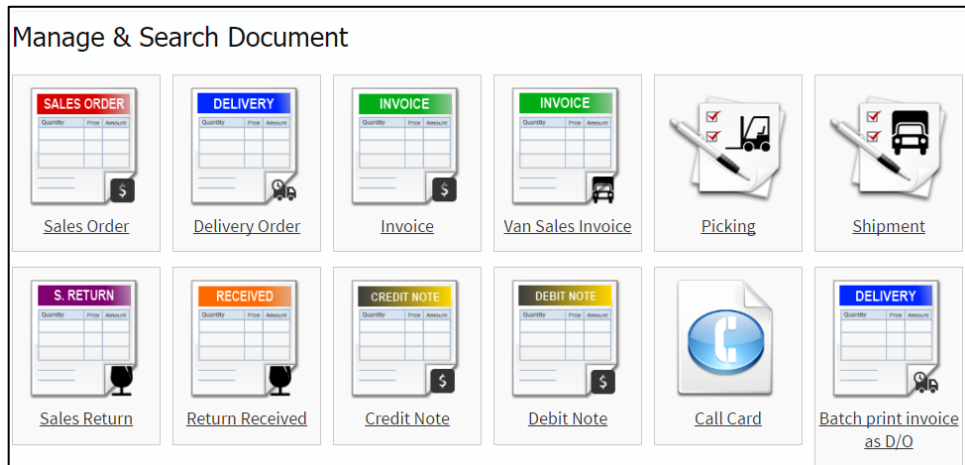
Status: ☒ Completed

Is Printed: NO

Preview Export to PDF

1. Choose the Sales Invoice Date.
2. Is Printed:
 - a. No, to print all invoices that not yet print before
 - b. Yes, to print all invoices that already printed before
3. Click Preview button.
4. Then, tick the Credit Note, and click Export to PDF button.

2. Manage & Search Document



1. Click to access any Sales Transaction.

The 'Manage Sales Invoice' window displays the following information:

Division: SUN
Company Name: XXX TRADING SDN BHD
Description: SUN SDN. BHD.

Advanced search | Batch print | Create

Displaying 1-20 of 97 results.

Inv. No	D/O No	Your Ref.	Date	Area	Agent	Customer	Term	Net Amount (RM)	Printed	Status	Actions
IN0700030	SO0700041	ABCcode	09-11-2016	-	S02	308G/099 - GOOD GOOD MART SDN BHD	14DAYS	95.40	No	Completed	
IN0700029	SO0700040	XYZcode	09-11-2016	-	S02	308G/098 - GREAT GREAT MART SDN BHD	14DAYS	915.27	No	Completed	

a. Search Document

Inv. No	D/O No	Your Ref.	Date	Area	Agent	Customer	Term	Net Amount (RM)	Printed	Status	Actions
IN0700030	SO0700041	ABCcode	09-11-2016	-	S02	308G/099 - GOOD GOOD MART SDN BHD	14DAYS	95.40	No	Completed	 
IN0700029	SO0700040	XYZcode	09-11-2016	-	S02	308G/098 - GREAT GREAT MART SDN BHD	14DAYS	915.27	No	Completed	 

1. Search box below the title bar.

Inv. No	D/O No	Your Ref.
IN0700030	SO0700041	ABCcode
IN0700030134	IN0700030134	

Search using Document Code/Number

Area	Agent	Customer
D09		
D09	S01	308G/098 - GREAT GREAT M
D09	admin	309P/006 - STESYEN MINYAK PASAR MELAYU BALING BHD

Search using Area Code

Customer	Term	Net Amount (RM)
good		
308G/099 - GOOD GOOD MART SDN BHD	14DAYS	95.4
308G/099 - GOOD GOOD MART SDN BHD	14DAYS	55.1

Search Using Customer Code/Customer Name

Term	Net Amount (RM)	Printed	Status
cod			
COD	12.70	No	Draft
COD	19.10	No	Draft

Search using the Term Code

Printed	Status	Actions
No	Draft	 
Yes	Draft	 
Yes	Completed	 

Search using Printed Status (Yes or No)

Status	Actions
Draft	 
Draft	 
Completed	 

Search using Exported Status (N-Not Export, P-Exported)

Document Advanced Search

[Advanced search](#) | [Batch print](#) | [Create](#)

Displaying 1-20 of 97 results.

	Term	Net Amount (RM)	Printed	Status	Actions
BHD	14DAYS	95.40	No	Completed	 
BHD	14DAYS	915.27	No	Completed	 

Division	SUN	Description	SUN SDN. BHD.
Company Name	XXX TRADING SDN BHD		
Advanced Search			
Customer			
Date From		to	
Status	☐ Draft ☐ Void ☐ Pending ☐ WIP ☐ Completed		
			Search Reset

1. Search by the document Date range/Customer Name/Customer Code/Document Status

b. View Document

1. Click  or the Document Code

Inv. No

IN0700030

IN0700029

to view the document/transaction details.

c. Print Document

1. Click  to download the pdf and print.

2. Or, go into the Document/Transaction, go to the bottom of the page, click  to download the pdf and print.

BUTTERWORTH
12100 BUTTERWORTH
PENANG

Delivery Attention

Delivery Phone 01

Delivery Fax 01

Copy To

Void

Close

Debit Note Lines

#	Item	Description	Location	Qty	UOM	Price	Disc %	GST	Order Amt	Tax Amt	Net Amt
1	R100678678	RIB MOB STRAWBERRY 330ML-24	MAH	-2.00	PACK	80.2800			-160.5600	0.0000	-160.5600

Discount0.00 %0.00 %0.00 %0.00 %

Tax Summary :

Order Amount (RM)-160.5600

Discount Amount (RM)0.0000

Tax Amount (RM)0.0000

Net Amount (RM)-160.5600

Print

d. Copy Document

Customer section

Customer * **308G/099** GOOD GOOD MART SDN BHD 308G/099 (GOOD)

Salesman * S02-Test Test WSL

Currency * RM 1.0000

Term * 14DAYS

Branch (none) Area -

Delivery Address

Delivery Attention

Delivery Phone 01 Delivery Fax 01

Copy To Reverse Void Close

Sales Order Lines

Tag	#	Item	Description	Location	Promo	Qty	UOM	List Price	Price	Disc %	GST	Order Amt	Tax Amt	Net Amt
	1	041042	CHERRY COLA 1 X 12 CANS x 325ml 1 X 12 CANS x 325ml	MAIN	300VC	2.00	CTR	45.0000	45.0000		SR	90.0000	5.2900	93.4900
	2	041043	MINT COLA 1 X 12 BTL	MAIN	300VC	2.00	UNIT	5.7000	5.7000	100.00	SR	11.4000	0.0000	0.0000
	3	VC01	VOUCHER RM10	MAIN	300VC	2.00	UNIT	0.0000	0.0000	100.00		0.0000	0.0000	0.0000

1. At Sales Order/Sales Invoice/Sales Credit Note document header page, click the Copy To button.

Copy Sales Order [CC0700021138]

Copy To **SALES ORDER**

Document No **SALES ORDER**
CREDIT NOTE

2. Copy Sales Order > Sales Order/Credit Note.

Copy Sales Invoice [IN0700030]

Copy To **SALES ORDER**

Document No **SALES ORDER**
CREDIT NOTE

3. Copy Sales Invoice > Sales order/Credit Note.

Copy Credit Note [CN0700010]

Copy To **SALES ORDER**

Document No **SALES ORDER**
CREDIT NOTE

Location **SALES DEBIT NOTE**

4. Copy Credit Note > Sales Order/Sales Credit Note/Sales Debit Note.

Location	MAIN ▼
	MAIN
	VAN-S02
Division *	VAN-S02B
Company *	Test-Good
	Test-B
Customer *	XMAIN

5. Choose the location.

Check the lines to be copied : 3/3 selected

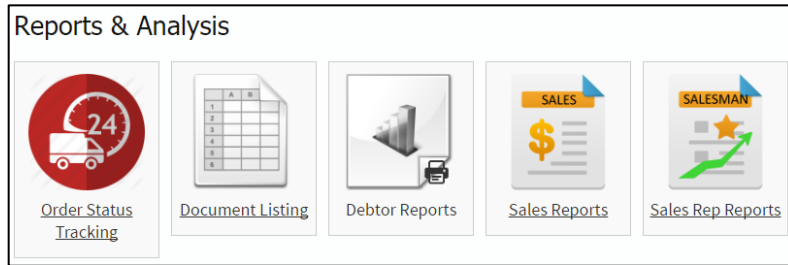
Total 3 results.

☒	#	Item	Description	Location	Promo	ETD	Price	Qty	UOM	Price	Disc %	GST	Net Amt
☒	1	041042	CHERRY COLA 1 X 12 CANS x 325ml 1 X 12 CANS x 325ml	MAIN	300VC	11-11-2016	45.0000	2.00	CTR	45.0000		SR	93.4900
☒	2	041043	MINT COLA 1 X 12 BTL	MAIN	300VC	11-11-2016	5.7000	2.00	UNIT	5.7000	100.00	SR	0.0000
☒	3	VC01	VOUCHER RM10	MAIN	300VC	11-11-2016	0.0000	2.00	UNIT	0.0000	100.00		0.0000

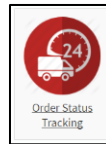
6. Tick the item that want to copy.

7. Click Confirm Copy button.

3. Report & Analysis



a. Order Status Tracking



Order Status Tracking

Division: General - General

Date From: 18-05-2015 to 19-05-2015

Salesman: ALL

S/O No:

Customer:

Invoice No:

Search

Salesman	S/O Date	Customer	Item Code	Odr Qty	UOM	Price	Status	Pick Code	Pick Date	Inv Code	Inv Date	Ship Code	Ship Date
Define search criteria(s) to show data													

1. Select the criteria (date, salesman, S/O no., customer name, or invoice no.) to view the Sales Order status.
2. Click Search.

Displaying 1-18 of 18 results

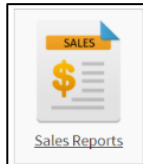
Salesman	S/O Date	Customer	Item Code	Odr Qty	UOM	Price	Status	Pick Code	Pick Date	Inv Code	Inv Date	Ship Code	Ship Date
S/O - CC0100018N88 (UPDATED : 2015-04-22 15:58:23)													
N88	30-03-2015	3000/C45 - MDS MART SDN BHD	AAA010006	4.00	CTN	35.70	PICKED	PK00003	22-04-2015				
S/O - CC0100019N88 (UPDATED : 2015-04-22 15:58:23)													
N88	06-04-2015	3000/C38 - CHERRY MARKETING	AAA010006	4.00	CTN	35.70	PICKED	PK00003	22-04-2015				
		AAA010006D	4.00	UNIT	0.00								
S/O - SO000015 (UPDATED : 2015-03-20 10:47:48)													
AlexLim	20-03-2015	3000/A07 - AN BEE	AAA010008A	45.00	UNIT	4.42	INVOICED		01-01-1970	IN00034	20-03-2015		
			AAA010234	2.00	CTN	30.30							
			AAA190144D	30.00	UNIT	1.90							
			APOLLO010011	5.00	CTN	121.00							
			APOLLO010159	5.00	CTN	64.00							
S/O - SO000016 (UPDATED : 2015-03-20 12:34:23)													
AlexLim	20-03-2015	3000/A17 - ASIA'S BAZAAR (M) SDN BHD	AAA010006	8.00	UNIT	2.98	INVOICED		01-01-1970	IN00035	20-03-2015		
			AAA190144	1.00	CTN	78.85							
			APOLLO010010	5.00	UNIT	1.51							
			APOLLO010121	5.00	UNIT	2.28							
			CAP030258	8.00	UNIT	5.30							
			LTS120183	1.00	CTN	27.50							

3. A list of sales order will be listed.
4. Status:
 - a. Draft – Sales Order at draft, not yet confirm.
 - b. Order Confirmed – Sales Order at WIP.
 - c. Picked – Sales Order already done picking.
 - d. Invoiced – Sales Order already done picking and invoicing.
 - e. Shipped – Sales Order already done picking, invoicing, and shipping.

S/O - SO00018 (UPDATED : 2015-05-19 16:36:45)							Stock Allocation	Group Credit Limit : 02/2015,03/2015					
AlexLim	30-03-2015	3000/A07 - AN BEE	AAA010006 APOLLO010906	8.00 CTN	35.70		DRAFT						
				30.00 CTN	70.00								

5. Sales Order at Draft with tag issue, will be labelled:
 - a. Stock Allocation – Sales Order with out of stock item.
 - b. Group Credit Limit – Sales Order with open bill and on due.

b. Sales Report



1. Click Sales Report.

Sales Reports

Select report : **Sales Reports**

Sales Summary Report

Sales Reports

Select report : **Sales Reports**

Sales Reports
 Claim Reports
 Sales History & Listing
 Sales Return History & Listing
 Customer Listing Reports

Select report : **Sales Reports**

Sales Summary Report
 Sales Summary Report
Sales Transactions Report
 Monthly Sales Report
 Detailed Sales Summary CSV
 Detailed Sales Summary CSV (with Rating)
 Delivery Summary by Item
 Invoice with weight Summary

2. Choose the sales report type.

Report Criteria			
Group By Level 1	AREA ▼	Group By Level 3	- ▼
Group By Level 2	- ▼	Group By Level 4	- ▼

- Choose report group by level 1 and up to 4.

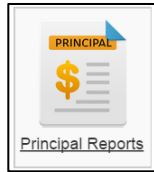
Group By Level 1	AREA ▼
Group By Level 2	AREA ▼
Format	SALESMAN
Date	CUSTOMER
Order Type	CUSTOMER CATEGORY
Item Type	CUSTOMER CHANNEL
Amt Include Tax	CUSTOMER CHAIN
	ITEM
	ITEM GROUP
	ITEM CATEGORY
	ITEM BRAND

- Level can view by Area, Salesman, Customer, Item, and etc.

Report Criteria			
Group By Level 1	AREA ▼	Group By Level 3	- ▼
Group By Level 2	- ▼	Group By Level 4	- ▼
Format	PDF ▼		
Date	01-05-2015  ✖	to	19-05-2015  ✖
Order Type	ALL ▼		
Item Type	PRODUCT ONLY ▼		
Amt Include Tax	NO ▼		
Use Case (CTN) Qty	NO ▼		
Division			
Customer Code	 to 		
Item Code	 to 		
Item Group			
Item Category			
Item Brand			
Customer Category			
Customer Channel			
Customer Chain			
Area			
Salesman / Agent			
 			

- Select other report criteria, and then Generate.

c. Sales Rep Report



1. Click Sales Rep Reports.

Select report :	Location Report (Map) ▼
Report Criteria	Location Report (Map)
	Salesman Daily Sales Report
	Salesman Daily Sales Details Report
	Salesman Daily Collection Report
	Salesman Credit Blacklist Report
	Daily Order Fulfillment Report
	Daily Order Details Fulfillment Report
	Daily Sales Return Fulfillment Report
	Salesman Attendance Report
	New Customer Listing Report
	Salesman Target Report
	Route Plan Fulfillment Summary Report
	Route Plan Fulfillment Detailed Report
	Customer Inventory Report
	Generate

 Sales Rep Reports   

Select report : Location Report (Map) ▼

Report Criteria

Date 01-05-2015  to 31-05-2015 

Division ALL ▼

Sales Team ▼

Salesman / Agent ALL

Generate Reset Print Map

2. Select the Sales Rep report type.
3. Select the criteria.
4. Click Generate.

4. Query Tools

a. Query Reserved Quantity

Manage Sales Order (Outstanding)

Division: Description:

Query Agt

1. Click on the Lockset icon.



- QueryReservedQty Query - Google Chrome

210.48.158.170/ssctest/index.php?r=query/queryReservedQty

Division: Item:

Code	Date	Picking Code	Salesman	Customer	Name	Total Qty
No results found.						

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Displaying 1-1 of 2 results.

Total 4 results.

Qty	UOM	List Price	Price	Disc %	GST	Net Amt
10.00	CTN	35.7000	35.7000			357.0000
12.00	CTN	30.3000	30.3000			363.6000
12.00	UNIT	3.2854	3.2854			39.4200

2. A new window will be opened.

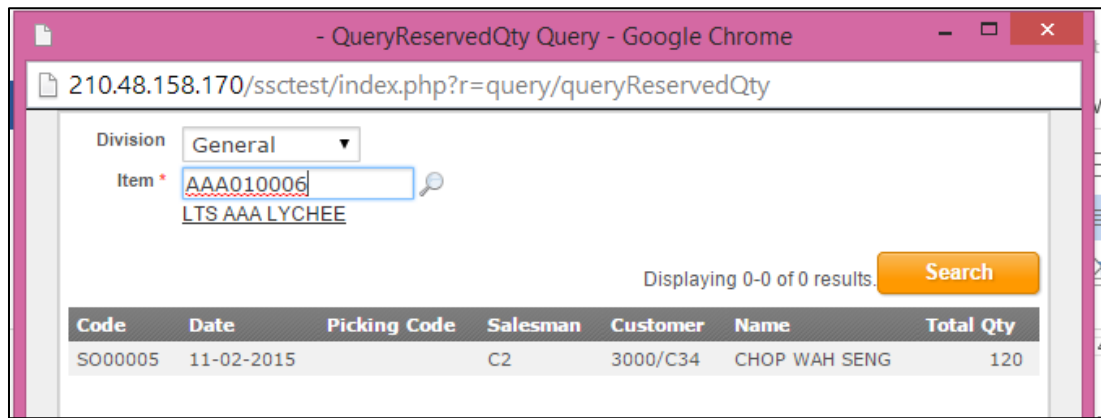
- QueryReservedQty Query - Google Chrome

210.48.158.170/ssctest/index.php?r=query/queryReservedQty

Division: Item:

Code	Date	Picking Code	Salesman	Customer	Name	Total Qty
No results found.						

3. Enter the item code in the search box and press Enter, or click on the magnifying glass to find item.
4. Then, click Search.

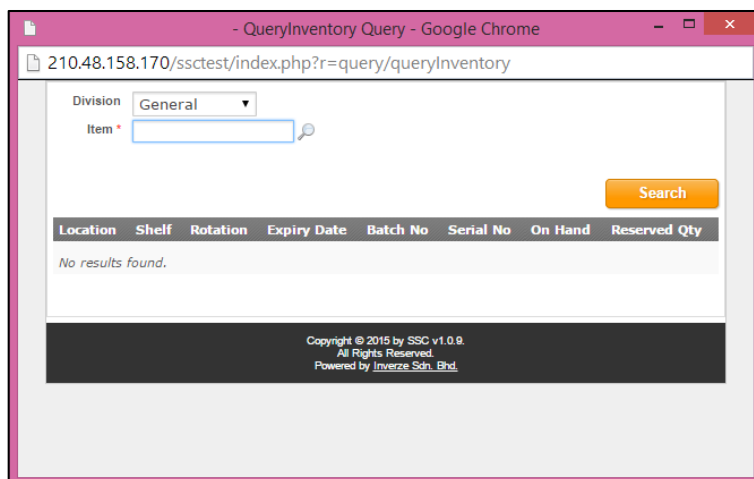


5. List of Sales Order will be displayed, and total quantity have been reserved.

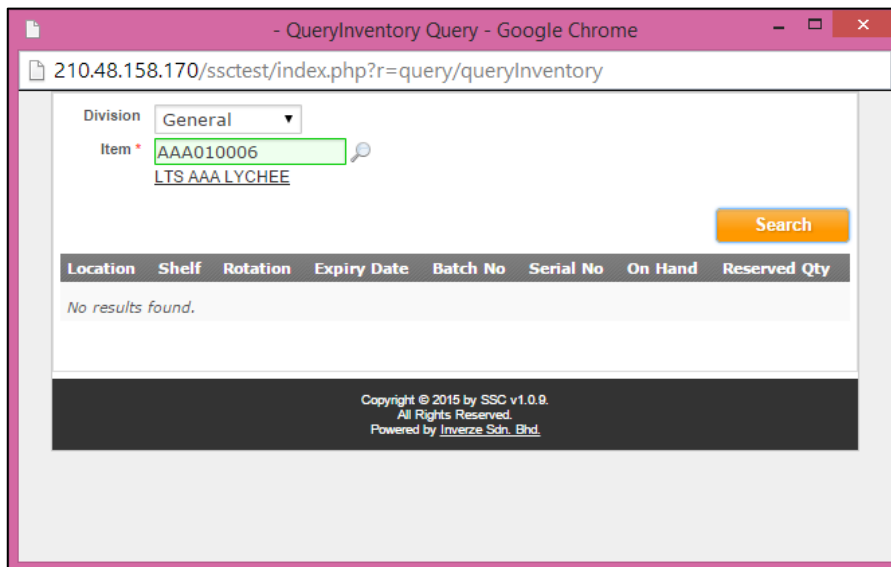
b. Query Inventory



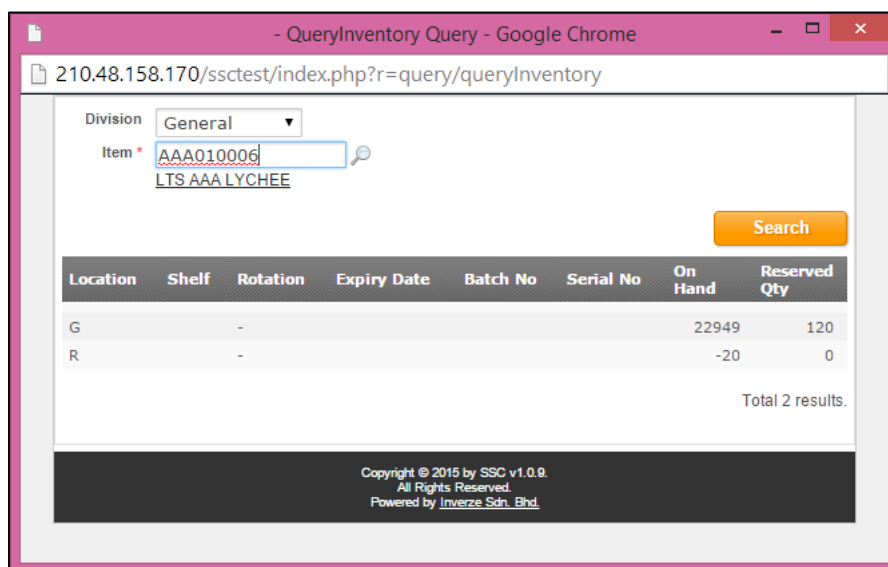
1. Click on the Graph icon.



2. A new window will be opened.



3. Enter the item code in the search box, and press Enter.
4. Then, click Search.



5. It will show the item's location, expiry date, on hand quantity, and reserved quantity.