

# Creating a Sales Order

1. Click 'Create Sales Orders' or the '+' icon.

2. Search for Account Name and click 'Enter'.

3. Select appropriate county option from dropdown.

4. Use Make, Model, & Year dropdowns to add new car. Click 'Add New' for additional line.

5. Add existing Company Equipment by Serial #, Make, Model. Or click 'Equipment Catalog'.

6. Click 'Options' to choose from available stock options.

Click to view any 'Pending SO's' for that account.

Customer Order Information

SO Number: S13659

Account Name: Jane Doe  
Account Balance: \$ 0.00/\$0.00  
RR: 0 %

County: Clarke County - 10.00%

Delivery Method: NONE

Source Of SO Creation: Madison County - 5.00%, Clarke County - 10.00%, Jefferson County - 7.00%

Order New Car

Type Of Product	Make	Model	Year	Amount
Car	Club Car	NONE	2023	\$ 0.00

+ Add New

Sell Company Equipment

Sr.#	Serial #	Make	Model	Type Of Product	Amount	Promotional Discount	Images	Action
5	BN20100538930	Club Car	TEMPO 2	Car	\$ 4100.00	0		
4				Car	\$ 0.00			

Equipment Catalog

Line Options

Total Equipment Options Tax: \$0.00



# Saving a Pending SO & Printing/Emailing a Quote

Once line items are complete and SO totals are correct, scroll down.

1. Click 'Quote It' to open the Pending SO window.

2. Save the SO as Pending & Print or Email the quote.

Make sure any pop-up blocker is turned off.

3. Click 'Quote It'.

The screenshot shows the 'Pending SO' window with the following elements:

- Buttons:** Save As Pending, Allocate Inventory, Print PickTicket, Push to Delivery, Print Quote, Email Quote, Save modified tax settings, Quote It!, Close.
- Form Fields:** Pending SO Name, Email (jdoe@email.com).
- Radio Buttons:** Yes/No options for Print COD Accounts, Return Remaining Deposit, and Turn Credits Applied To Sale.
- Totals:** Total Tax: 0.00, Grand Total: 9034.90, Account Balance: 9034.90.
- Footer Buttons:** Recommended Services Report, Save As Pending, Quote It!, Finalize All Pending PO, Finalize All Pending ST, General SO Comments, Cancel, Cash (F4), Check (F6), Credit Card (F7), Charge (F8), Special Terms, COD, Split Payment, Credit Card Manual.



# Taking Deposit Against Sale

Delete Showing 1 - 20 of 31 Show per page: 20 Filters: All | Edit | Delete

<input type="checkbox"/>	Sales Order No	Account/Lead Name	Source Of SO Creation	Customer PO #	Created Time	Web Order	Counter Person	Status	Action
<input type="checkbox"/>	S23491	John Smith			10-19-2023 14:45:40	No	John Smith	Pending	
<input type="checkbox"/>	S23488	Jane Doe			10-19-2023 14:37:55	No	Jane Doe	Pending	

You are currently in READ-ONLY mode. [Switch To Edit Mode](#)

Shop Parts : 0.00  
Total GP% « Sell Total : 10.00

[Manage Deposit/Purchase Gift Card](#)

Total Deposits For This Account : 0.00 Total Deposits For This SQ : Applied Deposit Amount :  
 Return Remaining Deposit

Total Deposits For This Account : 800.00 Total Deposits For This SQ : 800.00 | Applied Deposit Amount :  
 Return Remaining Deposit  Apply Deposit

**Add Gift Card or Deposit, or return Deposit**

Type: Deposit  
User: Jane Doe  
SO#: S13401  
Date: 12-07-2023  
\*Account Name: John Smith  
Total Deposit for this Account: \$ 0.00  
\*Amount: 800  
\*Payment Method: Cash  
Comment:

Auto Print

Add View All Deposits View All Gift Cards Close

1. Locate and click the appropriate Sales Order #.

2. Click 'Switch To Edit Mode'.

3. Click 'Manage Deposit'.

4. Enter the deposit amount. Select Payment Method.





5. Click 'Add'.

6. Deposit amount will be subtracted from SO balance.



# Finalizing a Sales Order / Processing Payment

Delete Showing 1 - 20 of 31 Show per page: 20 Filters: All + | Edit | Delete

<input type="checkbox"/>	Sales Order No	Account/Lead Name	Source Of SO Creation	Customer PO #	Created Time	Web Order	Counter Person	Status	Action
<input type="checkbox"/>	S23491	John Smith			10-19-2023 14:45:40	No	John Smith	Pending: Service - Work-In-Progress	   

You are currently in READ-ONLY mode. [Switch To Edit Mode](#)

1. Locate and click the appropriate Sales Order #.
2. Click 'Switch To Edit Mode'.
3. Scroll down and click 'Finalize All Pending PO'.

Total Deposits For

Return Credits Applied To Sales Order: 0.00

Grand Total: 9034.90

Account Balance: 9034.90

jd@e.com

No Receipt  Print/Email Documents As Per Account Document Preferences

Recommended Services Report Save As Pending Quote It! **Finalize All Pending PO** Finalize All Pending ST General SO Comments Cancel

Cash (F4) Check (F6)  
Credit Card (F7) Charge (F8)  
Special Terms COD  
Split Payment  
Credit Card Manual





# Opening an Account's Pending Quotes

OMNNA Point Of Sale Sales Management Deliveries Product Management Equipment Management Ignite Your Margin Data Tools Person

Sales Orders Sales Orders Create Sales Orders

Create Sales Order

Customer Order Information

Acc. Phone  Last Name  Fast Lookup  Exact Match  Current Location

SO Number: S13659

Address Schedule Account Name Jane Doe Account Balance: \$ 0.00/\$0.00 Note: RR: 0%

Counter Person John Doe

CP Location FORT MYERS

County Clarke County - 10.00%

Quote It! Create Kit Trade In Pending SO Account No A23456

1. Search an account name and click 'Enter'.

2. Click 'Pending SO' to open the Pending Sales Orders window.

Pending Sales Orders

Account Name: Jane Doe Account Number: A12345

SalesOrder #	Counter Person	Grand Total	Status	Quote	Pending SO Name	Inventory Allocated	Vehicle Comment	Date Last Modified
S33595	John Smith	\$ 8240.000	Pending Quote	Yes		Yes		2023-12-28 10:55:39
S33598	Jane Doe	\$ 8240.000	Pending Quote	Yes				
S13430	John Doe	\$ 125.000	Pending: Service - Work-In-Progress	No				09:03:23
S13404	Jane Johnson	\$ 1282.000	Pending: Time Out	No				2023-12-28 03:41:13
S43621	John Doe	\$ 105.000	Pending Quote	Yes		Yes		2023-12-28 01:38:57
S13417	John Smith	\$ 9944.600	Pending Quote	Yes		Yes		2023-12-27 09:42:43
S13431	Jane Johnson	\$ 1293.950	Pending: Time Out	No				2023-12-26 15:22:09
S13403	John Doe	\$ 1418.950	Pending: Service - Work-In-Progress	Yes		Yes		2023-12-26 14:40:19
S13395		\$ 11803.870	Pending Quote	Yes		Yes		2023-12-26 10:13:10

3. Click on Sales Order # to open SO in a new window.





# Adding a New Account on SO

## Create Sales Order

Customer Order Information  Acc. Phone  Last Name  Fast Lookup  Exact Match  Current Location

SO Number: S13652

Address   
Schedule  Account Name

**!** Accounts are managed in the Sales Management module.

1. Click the **+** button next to the account name field.

**Add New Account**

Create Account

**Account Information**

* Account Number	<input type="text" value="A23456"/>	Email	<input type="text" value="janedoe@omnna.com"/>
Account Name	<input type="text" value="Jane Doe"/>	Other Email	<input type="text"/>
Sales Person	<input type="text" value="jsmith"/>	Credit Invoice Email	<input type="text"/>
Sales Group	<input type="text"/>	Statement Email	<input type="text"/>
Sales Area	<input type="text"/>	Email Opt Out	<input type="checkbox"/>
Account Category	<input type="text" value="consumer"/>	Mailing List Opt Out	<input type="text"/>
Website	<input type="text" value="Http://"/>	Charge Gross Receipts Tax	<input type="text" value="No"/>
24 Month Payment History	<input type="text"/>	Member Of	<input type="text" value="NONE"/>
Title	<input type="text" value="Mrs."/>	Employees	<input type="text"/>
Contact First Name	<input type="text" value="Jane"/>	Annual Revenue: (\$)	<input type="text"/>
Contact Last Name	<input type="text" value="Doe"/>	Default Location	<input type="text"/>
Phone	<input type="text" value="1234567890"/>	Is Location Account	<input type="text" value="No"/>

Amount	Action
\$ 0.00	<input type="button" value="🗑️"/>

Total Equipment Amount: \$0.00

2. Complete the necessary Account Information. (Continued on next slide)





# Adding a Car with Equipment Catalog

1. Click to open the 'Equipment Catalog'.

2. Use the dropdowns to narrow results.

3. Click 'Search Equipment'.

4. Click the 🛒 icon to add the equipment to the SO.

Serial #	Equipment Type	Product Family	Model	Make	Division	Year	Car Color	Power Source	Wheel Type	Seat Color	Passengers	Suspension Type	Location	Inventory Status	Equipment Status	Vehicle Warranty	Include Order
AW2323416452	Car	Retail -For Sale	ONWARD 6 PASS	Club Car		2023	BLACK	GAS					E101 (FORT MYERS)	-	N-NEW		Available
BW2322413173	Car	Retail -For Sale	ONWARD 4 PASS	Club Car		2023	WHITE	GAS					E101	-	N-NEW		Available
BW2322413175	Car	Retail -For Sale	ONWARD 4 PASS	Club Car		2023		GAS					(FORT MYERS)				





# Adding Options/Products to a Sales Order

OMNNA Point Of Sale Sales Management Deliveries Product Management Equi

1. Click 'Options' to open Equipment Options window. Choose from list.

Sr.# Serial # Model Club Car

1 BN20100538930

4

Options for the Equipment

Show 5 entries

Type	Part	Part Name	Qty	Sell Price	Sell Price Ext	Pay Commission
No Equipment Options found!						

Showing 0 to 0 of 0 entries

First Previous Next Last

Close

Promotional Discount 0

Images

Action

Total Equipment Amount: \$4100.00

Total Equipment Amount With Tax: \$4100.00

Line Options

Transaction	Barcode #	Product #	Product Name	Related Sales Order	QoH/TA	Order Qty	Ship Qty	Sell Price	List Price	Sell Ext	Action
1 Normal Sale		72173LD	lift kit	- Select SO -	0,0	1	1	0.000	0.00	0.00	
	RD Note:		LIFT KIT, SPINDLE 3" EZ E - 7217-3LD - .	PRR 0 %	0				(+) Tax :	0.00	
			LiR: Kit (Jakes) Dbl Arm 4" CC - 7466 - .		WH			GP%			LS
			LiR: Kit (Jakes) Dbl Arm 6" CC - 7475 - .					\$ SP			
			LiR: Kit, Rear For LIFT-107E And LIFT-107								
			LiR: Kit, Rear, E-Z-Go, LIFT-110, LIFT-111, L								
			LiR: Kit, Rear, E-Z-Go TXT Gas 01.5-08.5, 1								
			LiR: Kit Rear, RHOX BMF 7" A-Arm LiR: Kit, E-Z-G								
			LiR: Kit, Rear, RHOX 5" Drop Axle, E-Z-Go TXT Gas								
			LiR: Kit, Rear, RHOX BMF 7" A-Arm, E-Z-Go TXT Ga								

2. Add more products to SO by searching Product # or Name.

3. Click 'Add Product' to create an additional line item.

Add Product Import as CSV Copy SO To Clipboard Copy SO#

