Creating a Sales Order

OMNNA

Point Of Sale | 👤 Sales Management | 🗂 Deliveries | 🏢 Product Management | 🏢 Equipment Management | 🏷 Ignite Your Margin | 🗄 Data Tools | 🖽 Person

Sales Orders › Sal | Sales Orders ▶ | Create Sales Orders

Service Orders ▶ | Stock Order

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

Create Sales Order

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1

Customer Order Information

☑ Acc. Phone ☐ Last Name ☑ Fast Lookup ☐ Exact Match ☐ Current Location

SO Number: S13659

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

2

Account Name | Jane Doe | 🔍 ➕ 👤

Account Balance: $ 0.00/$0.00   RR: 0 %

Note :

County | Clarke County - 10.00%

NONE
Madison County - 5.00%
Clarke County - 10.00%
Jefferson County - 7.00%

Address

Schedule

Quote It! | Create Kit | Trade In

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

Delivery Method

Source Of SO Creation

3

3. Select appropriate county option from dropdown.

Order New Car

Type Of Product	Make	Model			
Car ▾	Club Car ▾	NONE ▾	2023 ▾	$ 0.00	🗑

4

➕ Add New

4

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

Sell Company Owned Equipment

Collapse\Show All Option

Sr.#	Serial # ⊙		Make	Model	Type Of Product	Amount	Promotional Discount	Images	Action
5	BN20100538930	OPTIONS	Club Car	TEMPO 2	Car ▾	$ 4100.00	0	🖼	▾ 🗑 ➕
4					Car ▾	$ 0.00			▾ 🗑 ➕

6

Equipment Catalog

5

Line Options

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

Total Equipment Options Tax: $0.00

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

Saving a Pending SO & Printing/Emailing a Quote

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Pending SO

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

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

Inventory will be automatically allocated in case of COD

Pending SO Name :

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

Save As Pending

Total Tax : 0.00

Allocate Inventory

! Make sure any pop-up blocker is turned off.

Print PickTicket

Print COD *Accounts not eligible for COD will default to NO* ○ Yes ◉ No | SO : **0.00** | Applied Deposit Amount :

Push to Delivery ○ Yes ◉ No | Return Remaining Deposit

3. Click 'Quote It'.

Print Quote ○ Yes ◉ No | rn Credits Applied To Sale

Email Quote ○ Yes ◉ No

jdoe@email.com

Grand Total : 9034.90

Account Balance : 9034.90

Save modified tax settings ○ Yes ◉ No

Print/Email Documents As Per Account Document Preferences ☑ ?

Quote It! Close

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

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

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

1. Locate and click the appropriate Sales Order #.

You are currently in READ-ONLY mode.   Switch To Edit Mode

2. Click 'Switch To Edit Mode'.

Shop Parts :   0.00   No   Jane Smith   Service
Total GP% « Sell Total :   10.00

3. Click 'Manage Deposit'.

Manage Deposit/Purchase Gift Card

Total Deposits For This Account : 0.00   Total Deposits For This SO   Applied Depo
Return Remaining 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

4. Enter the deposit amount. Select Payment Method.

5. Click 'Add'.

6. Deposit amount will be subtracted from SO balance.

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

Finalizing a Sales Order / Processing Payment

	Sales Order No	Account/Lead Name	Source Of SO Creation	Customer PO #	Created Time	Web Order	Counter Person	Status	Action
☐	S23491 ①	**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 ②

○ **Total Deposits For**

Return Credits Applied To Sales Order : ⑦   0.00

Grand Total :   9034.90

Account Balance :   9034.90

jdoe@email.com

No Receipt ☐ Print/Email Documents As Per Account Document Preferences ✅ ⑦

Delete   Showing 1 - 20 of 31   ⏮ ◀ **1** 2 ▶ ⏭   Show per page: 20 ▾ Filters : All ▾   ➕ | Edit| Delete

1. Locate and click the appropriate Sales Order #.

2. Click 'Switch To Edit Mode'.

3. Scroll down and click 'Finalize All Pending PO'.

Cash (F4)   Check (F6)

Credit Card (F7)   Charge (F8)

Recommended Services Report   Save As Pending   Quote It!   Finalize All Pending PO ③   Finalize All Pending ST   General SO Comments   Cancel   Special Terms   COD

Split Payment

Credit Card Manual

Opening an Account's Pending Quotes

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

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

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

Adding a New Account on SO

Accounts are managed in the Sales Management module.

1. Click the ➕ button next to the account name field.

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.

Adding Options/Products to a Sales Order

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

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

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