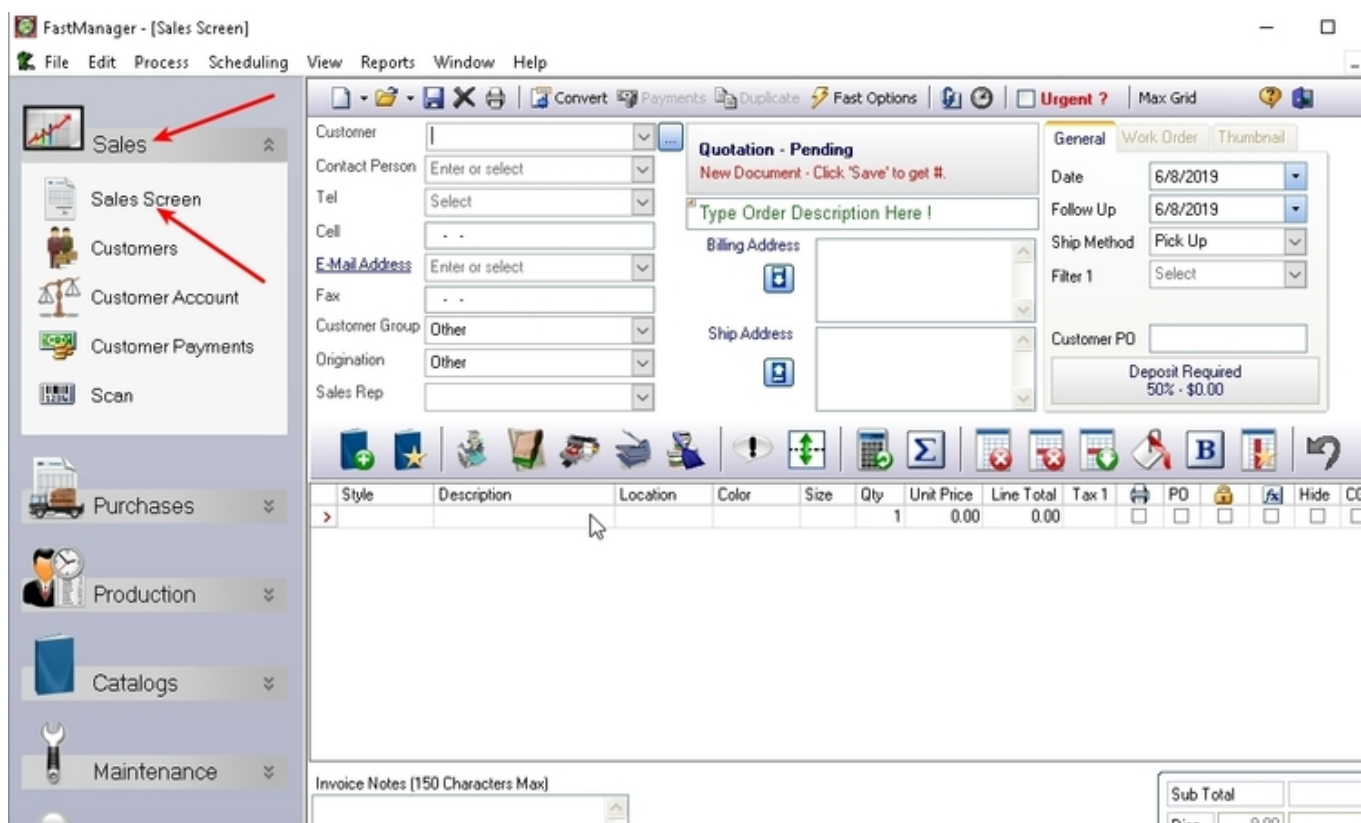


Creating Sales Orders

Quotations, Work Orders and Invoices can be created from the **Sales Screen**

To open the Sales Screen, expand the section: Sales on the navigation bar at the left, then click on Sales Screen:



Quotation

You can create quotations consistently and accurately in under 2 minutes.

When you open the sales screen for the first time, you can immediately start entering a quotation.

- There are 2 types of quotations:
 - *Pending* and
 - *Lost*

To convert a quotation from one status to the other, click on the Convert Button

Fastmanager - [Sales Screen]

File Edit Process Scheduling View Reports Window Help

Convert Payments Duplicate Fast Options Urgent ? Max Grid

Customer: Test
Contact Person: Test
Tel: 21-564-9870
Cell: -
E-Mail Address: test@test.test
Fax: -
Customer Group: Other
Origination: Other
Sales Rep: House Account

Work In Progress
Invoice
Lost Quotation

TEST Order

Billing Address
Ship Address

General Work Order Thumbnail

Date: 7/26/2017
Follow Up: 8/2/2017
Ship Method: Pick Up
Filter 1: Select
Customer PO:
Deposit Required 50% - \$512.11

Style	Description	Location	Color	Size	Qty	Unit Price	Line Total	Tax 1	Tax 2	PO	FA	Hide	CG
1 1011	Elite Jersey-Youth		Black	S	10	12.90	129.00	Tax	Non	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2 1011	Elite Jersey-Youth		Black	M	10	12.90	129.00	Tax	Non	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3 1011	Elite Jersey-Youth		Black	L	10	12.90	129.00	Tax	Non	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4 1011	Elite Jersey-Youth		COLUMBIA	S	10	12.90	129.00	Tax	Non	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5 1011	Elite Jersey-Youth		COLUMBIA	M	10	12.90	129.00	Tax	Non	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6 Add Detail	Custom Screen Printing- w/	Center - Front		3	50	4.82	241.00	Non	Non	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	Artwork Preparation per ho				1	25.00	25.00	Non	Non	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8	Screen Usage Charge				3	20.00	60.00	Non	Non	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
>					1	0.00	0.00			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Invoice Notes (150 Characters Max)



If you convert a *Quotation* to a *Work Order* or even jump straight to an *Invoice* you cannot go back.
You would need to cancel the order or void the invoice.

Try to avoid converting to a Work Order until you *know* the job has been confirmed

- Once you have saved your quotation, you can select to print it out.
- The default layout has room at the bottom where you customer sign off on the amount and any other terms you may have included in the form of remark lines.
- Once the order is signed you can proceed to convert it to a work order.



Use the follow-up date on the right hand corner when generating a quotation.
You can then print a report on a daily basis to see which quotations you need to follow up on.

Work Orders

You can convert an existing quotation into a work order or simply enter a new work order

There are 2 types of work orders

- Work In Progress (WIP), and
- Canceled.

WIP orders will display on the job board and will be removed as soon as you cancel or invoice the order.

FastManager's PO wizard will also generate the required goods based on the WIP orders.

- If you cancel or invoice the order then FastManager will no longer see the goods as required, and they will therefore no longer appear on the PO Wizard

To convert a work order from one status to the other, click on the Convert Button



Once you have created a work order you cannot change the status back to a quotation.
You only have 2 choices - to "invoice" or to "cancel".

Once you have saved the WIP, you can select to print it out.

- There are various layouts that you can print out.

Work Order (Customer Copy)

- When you print this layout you will see it is labeled as a 'Sales Order'
 - The reason for this is that this is your customer's copy and as he is not going to be doing the work, to him it is a sales order.
- This layout will indicate the due date as well as any payments he made and the balance due when he collects.

Work Order (Production Copy)

- This is a basic layout of the order detail plus some room where they can write comments. It also has all the different dates, such as due date and ship date listed on the document.
- Any remark or other lines items that are marked not for printing **WILL** print on this document as it is intended for production.

Work Order Detail



The work order detail form is only useful *after* you have added some [Design Detail information](#)

- There are 2 different work order detail reports.
 - Print -> W0 Detail (Portrait & Landscape layout)
 - Print -> W0 Design Detail
- They are all the same. Some just display more info than the other. You only need to use one of

these layouts.

Which layout you choose will depend on how much information your shop needs to know vs. how much paper and ink you want to save.

- All three of these reports will print a thumbnail picture with more detail about each design.
- The intention of this report is to print it a day or two after you received the order and all artwork has been finalized.
- Most of the time when you first receive an order, you don't have the final artwork or design detail.
 - Your production already has a copy of the Work Order (Production Copy) so they have a broad idea of what is coming.
- Once you finalize the artwork and print out any of these 3 reports you can send it to the job file and they will now have a better idea of what the job will entail.



You can also print a packing slip that you can include in the box when you ship.

Once the order is complete you can invoice it to remove it from the Job Board which also keeps your AR up to date.

- No more late billing which costs you money.

Invoice

Although it is possible to create an Invoice directly, we recommend creating a Quotation or Work Order ("wip") at first.

You will convert to Invoice once the job is completed or you need to export the Invoice to Quickbooks for accounting or tax purposes.



Creating an Invoice straight away is useful when you are doing a sale that does not require production, *For example:* when selling preprinted goods through your Retail outlet

[← Sales: Overview](#)

[Order entry →](#)

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