

9.3 Sales orders

The potential can be considered as obtained when the order confirmation arrives. The order, however, may change from the initial proposed quote. vtenext gives you the option of keeping track of these differences. By default, the Generate Sales Order button from the Other menu of the quote sheet allows you to create the order by transferring the contents of the quote and making any changes.

Subject	We recommend including the reference to the company and/or potential to facilitate any future search of the order
Potential Name	Link between the order and relevant potential
Customer Number	If you use customer number codes, you can enter the one relating to the order here
Quote Name	Link to the quote that originated the order
Purchase Order	If the customer sends you a reference to their purchase order, you can enter it here
Contact Name	Connection with the customer contact (person you deal with)
Due Date	Order due date
Carrier	You can indicate the carrier that will make the delivery

Status	Important for knowing the state of progress of the order. The statuses can be freely set by the system administrator
Excise Duty	Special taxes or other costs
Account Name	Connection with the customer company to whom the order refers
Sales Commission	Any commissions
Assigned to	The CRM user who is managing the order, by default the person creating it

Revision #1

Created 25 May 2022 17:25:45 by Alberto

Updated 6 June 2022 12:30:15 by Alberto