


Creating a Sales Order in Brew Ninja

28 Steps [View most recent version](#) 

Created by

Bronwyn Lloyd

Creation Date

March 14, 2023

Last Updated

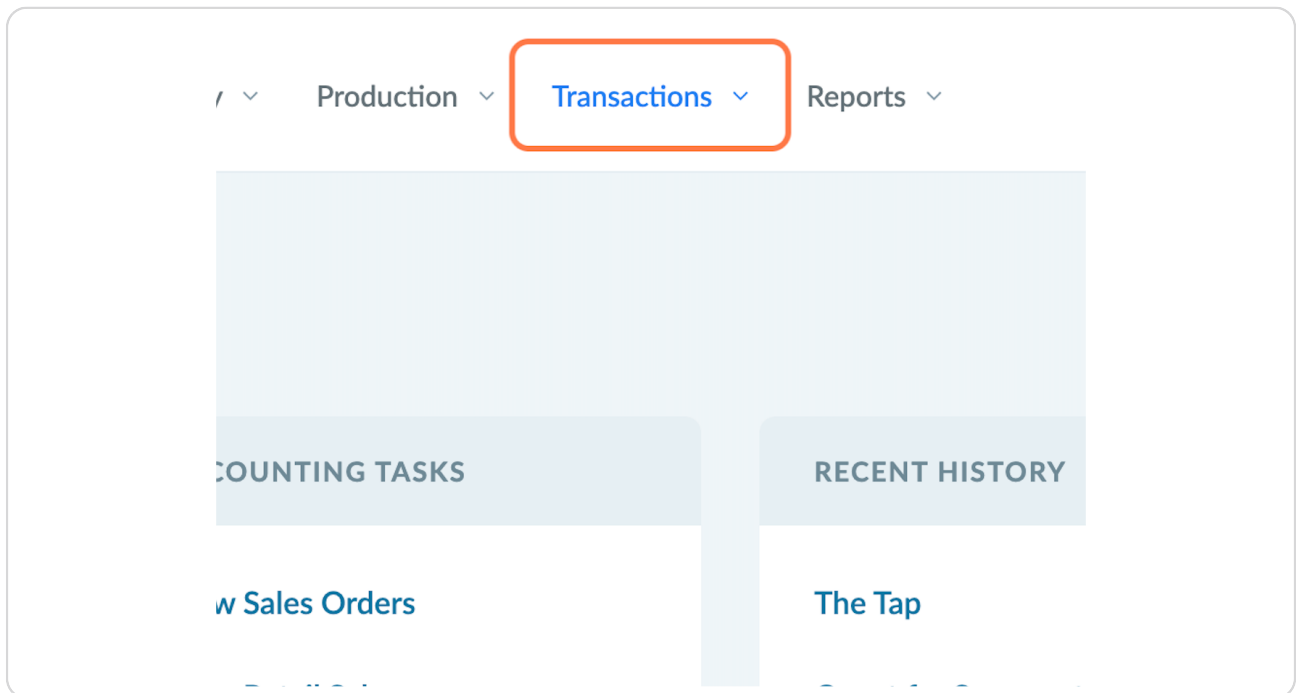
May 16, 2023

STEP 1

[Go to app.brewninja.net](https://app.brewninja.net)

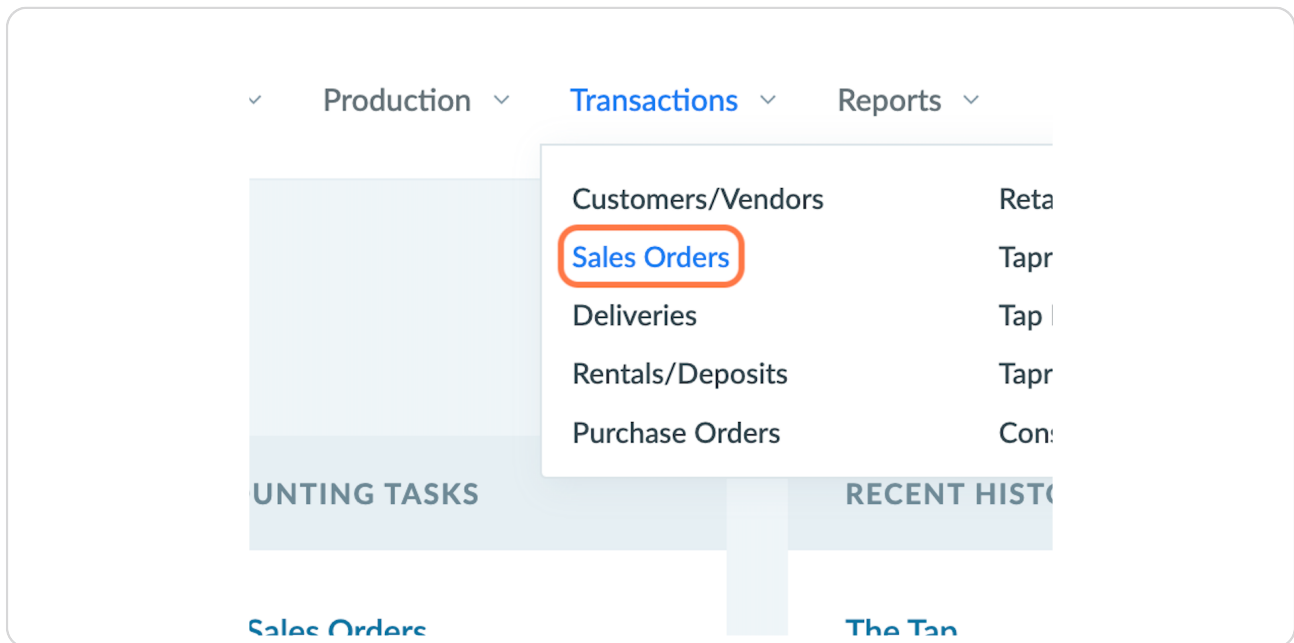
STEP 2

Click on Transactions



STEP 3

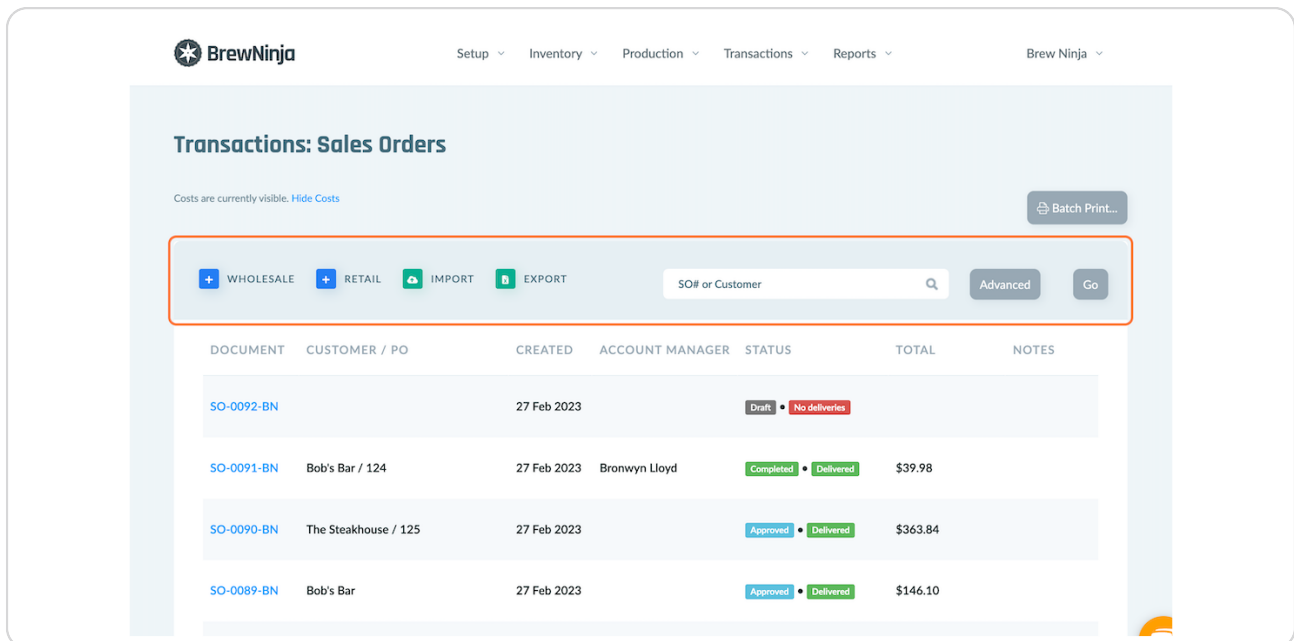
Click on Sales Orders



STEP 4

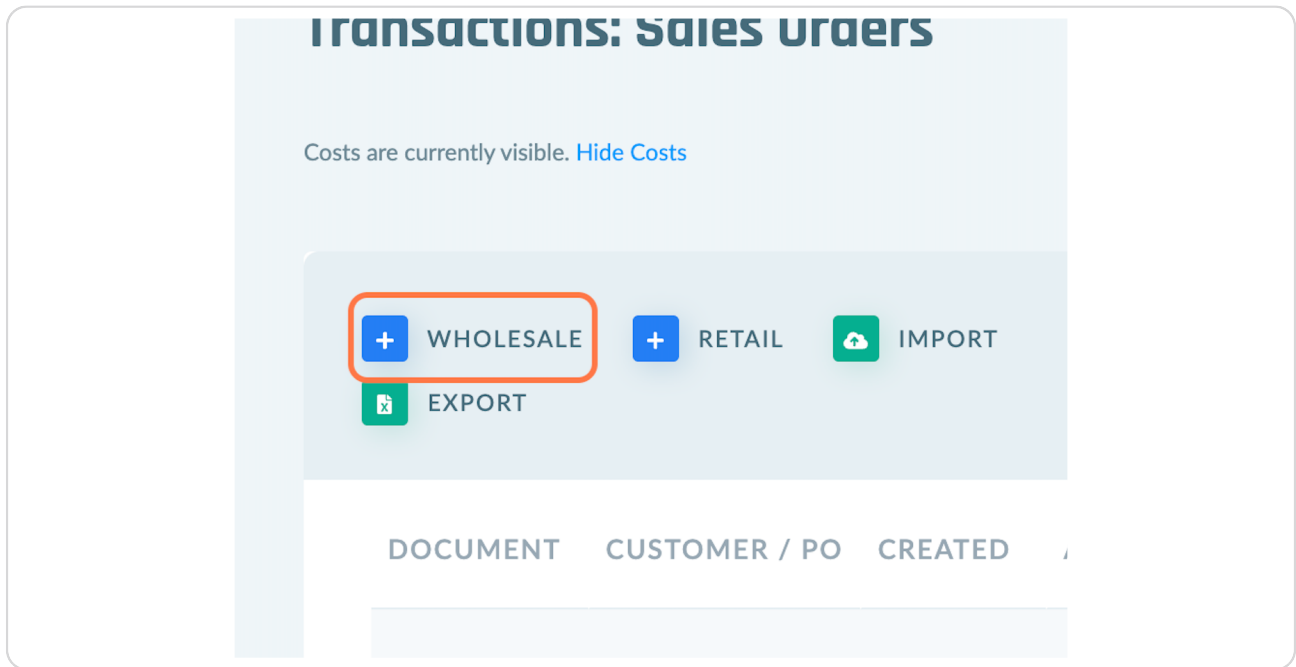
You can choose to create either a wholesale, or retail sales order

Pricing may differ on wholesale vs retail sales orders, depending on your SKU setup.



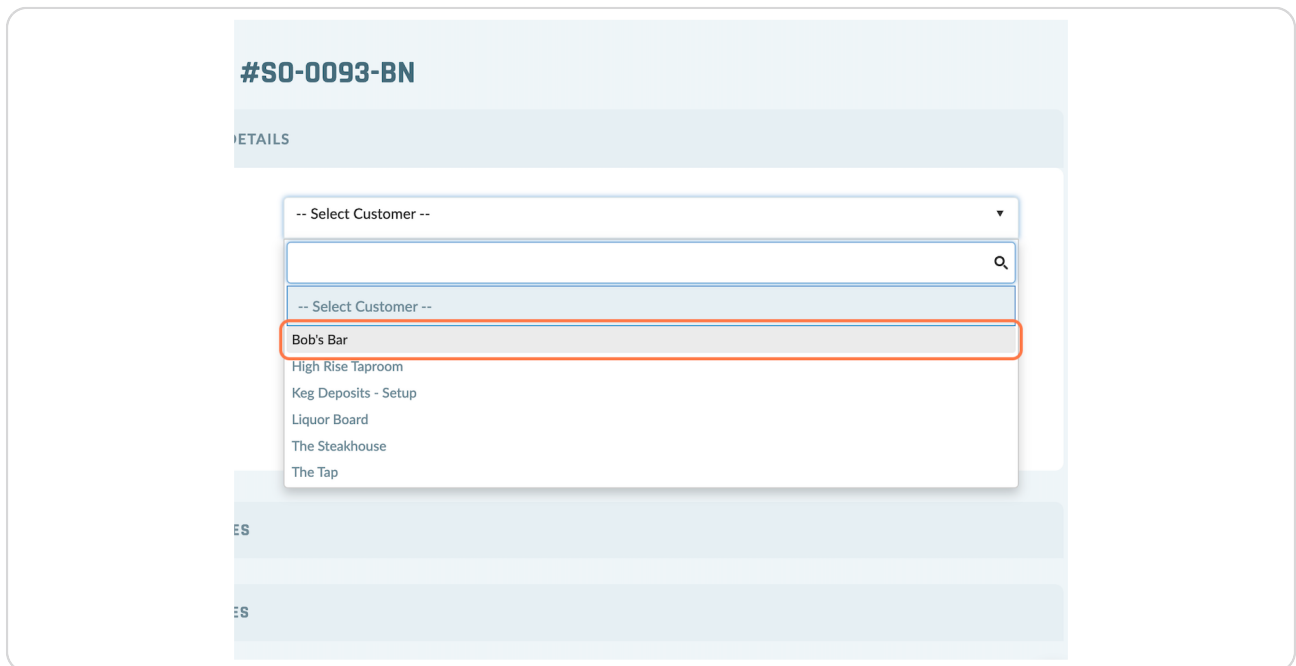
STEP 5

Click on **WHOLESALE**



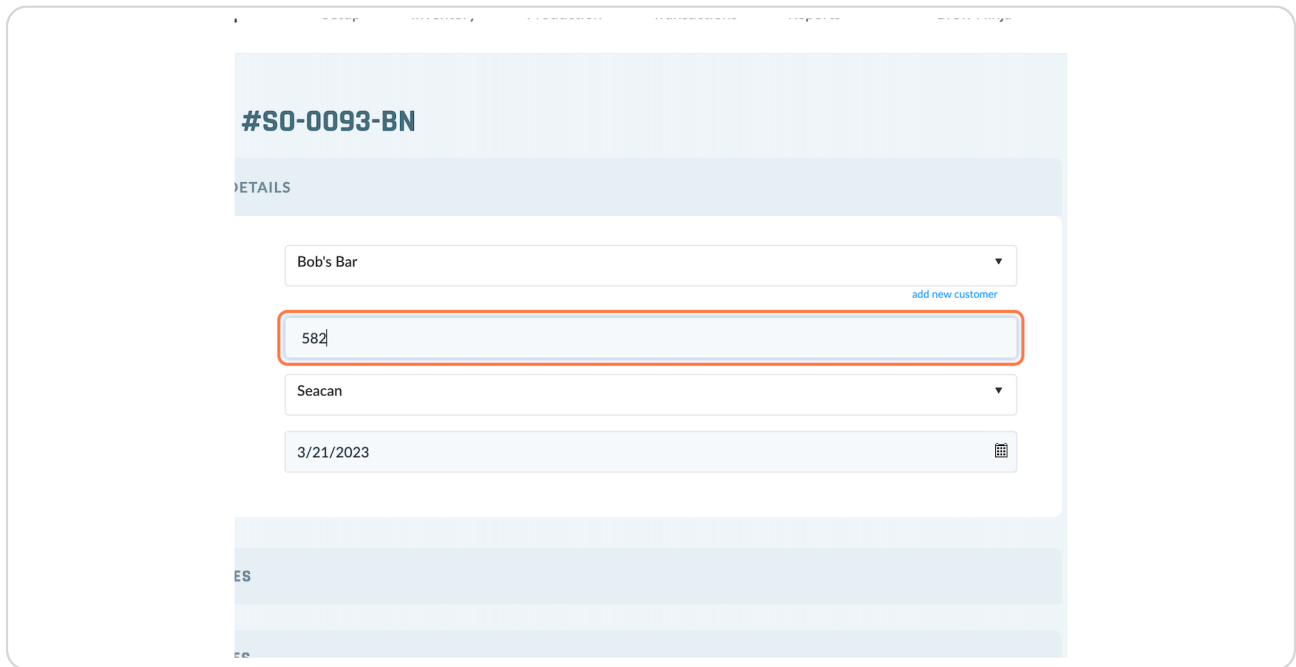
STEP 6

Select the customer that you are selling product to



STEP 7

You can input a PO number if the customer has supplied one

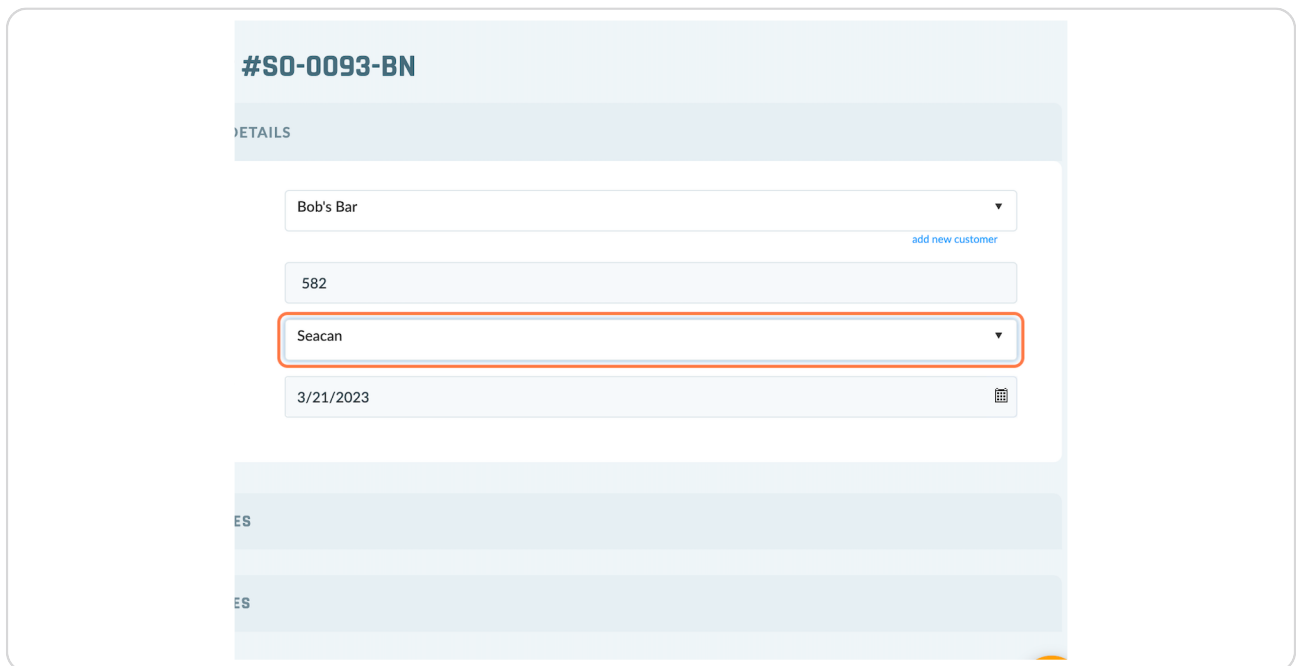


The screenshot shows a software interface with a header "#SO-0093-BN" and a "DETAILS" section. The form contains the following fields:

- A dropdown menu with "Bob's Bar" selected and a blue link "add new customer" to its right.
- A text input field containing "582", which is highlighted with a red border.
- A dropdown menu with "Seacan" selected.
- A date field containing "3/21/2023" with a calendar icon to its right.

STEP 8

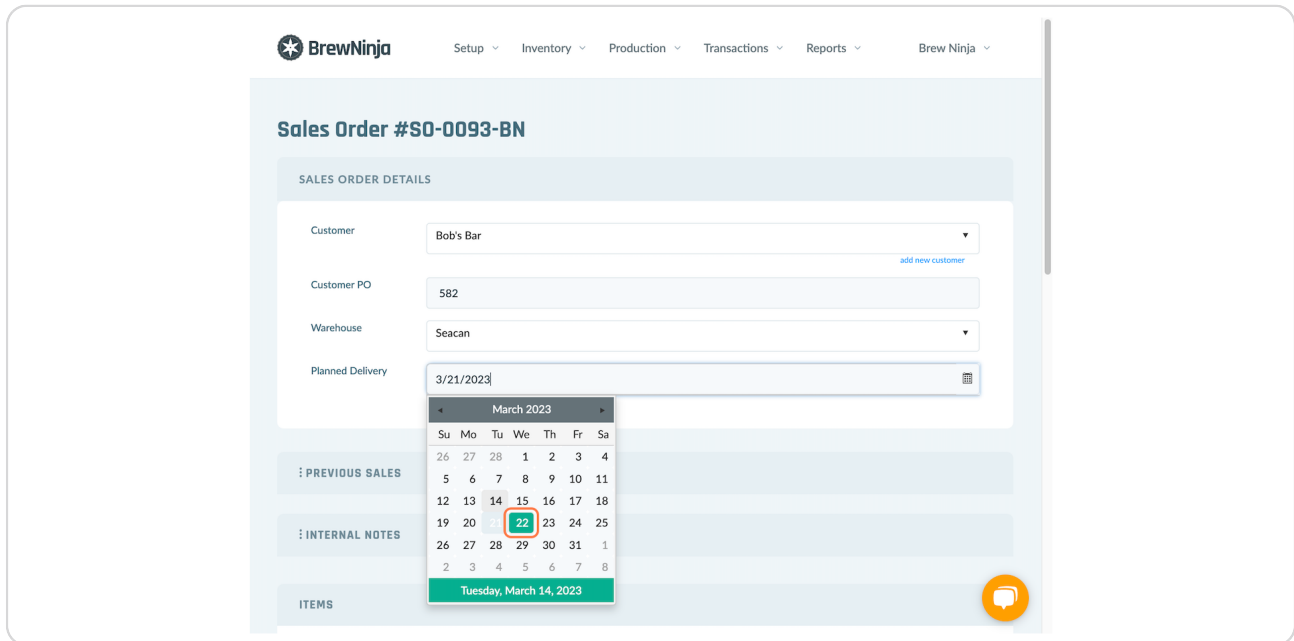
Select the warehouse that you would like to deduct inventory from



The screenshot shows the same software interface as in Step 7, but with the "Seacan" dropdown menu highlighted by a red border, indicating it is the selected warehouse for inventory deduction.

STEP 9

Select your planned delivery date

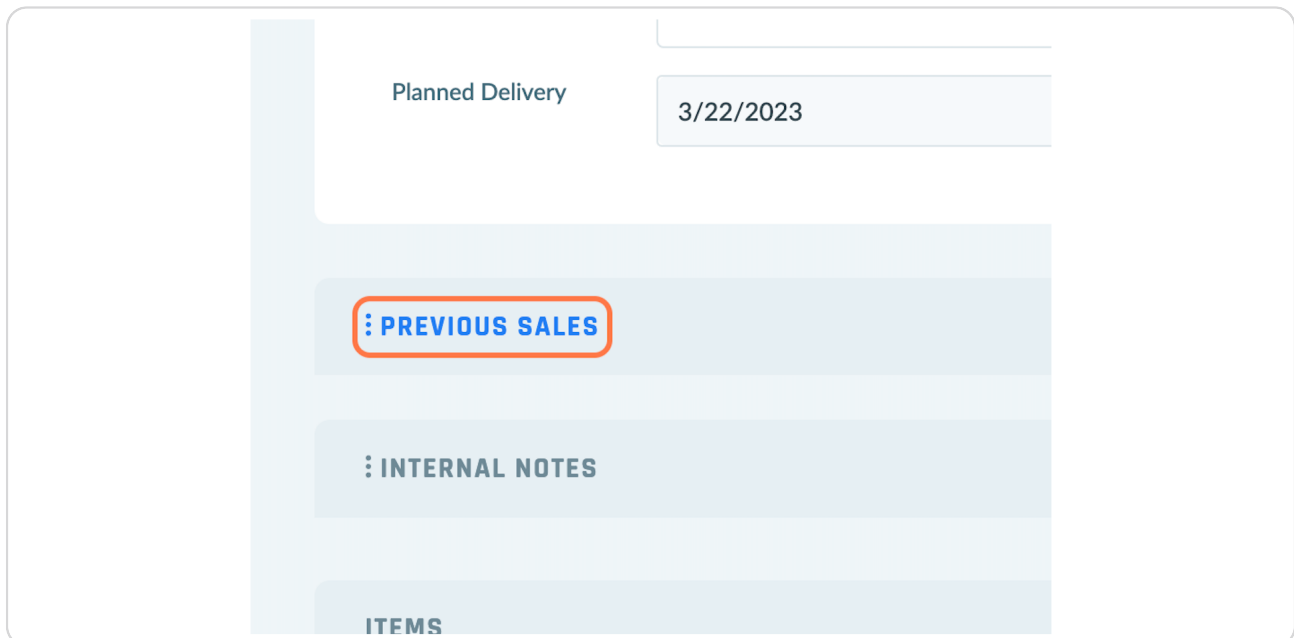


The screenshot shows the BrewNinja web interface for a sales order. The top navigation bar includes 'Setup', 'Inventory', 'Production', 'Transactions', 'Reports', and 'Brew Ninja'. The main heading is 'Sales Order #SO-0093-BN'. Below this, the 'SALES ORDER DETAILS' section contains several fields: 'Customer' (Bob's Bar), 'Customer PO' (582), 'Warehouse' (Seacan), and 'Planned Delivery' (3/21/2023). A date picker calendar is open, showing the month of March 2023. The date 3/22/2023 is highlighted in a red box. Below the calendar, there are sections for 'PREVIOUS SALES', 'INTERNAL NOTES', and 'ITEMS'. A chat icon is visible in the bottom right corner.

STEP 10

PREVIOUS SALES

Here you can easily access and open any previous sales to this customer

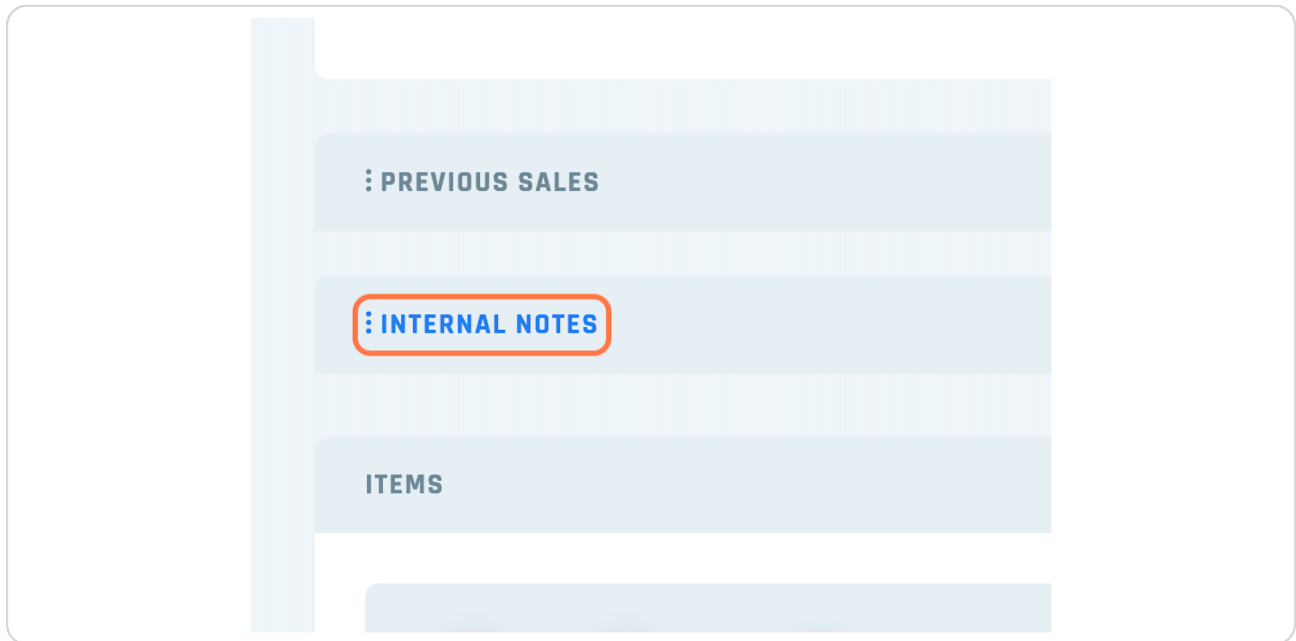


The screenshot shows a close-up of the 'Planned Delivery' section of the sales order form. The 'Planned Delivery' label is on the left, and the date '3/22/2023' is in a text input field on the right. Below this, there are three sections: 'PREVIOUS SALES', 'INTERNAL NOTES', and 'ITEMS'. The 'PREVIOUS SALES' button is highlighted with a red rounded rectangle. The 'INTERNAL NOTES' and 'ITEMS' sections are currently empty.

STEP 11

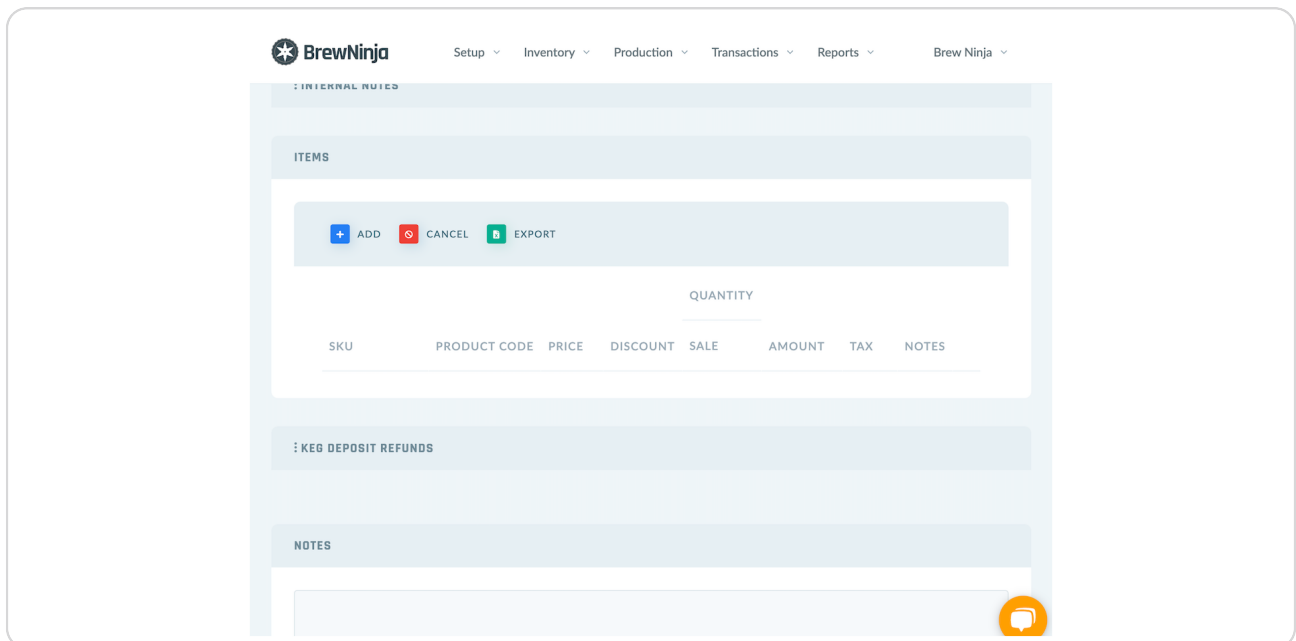
INTERNAL NOTES

Here you can add and view internal notes and tasks relating to this customer



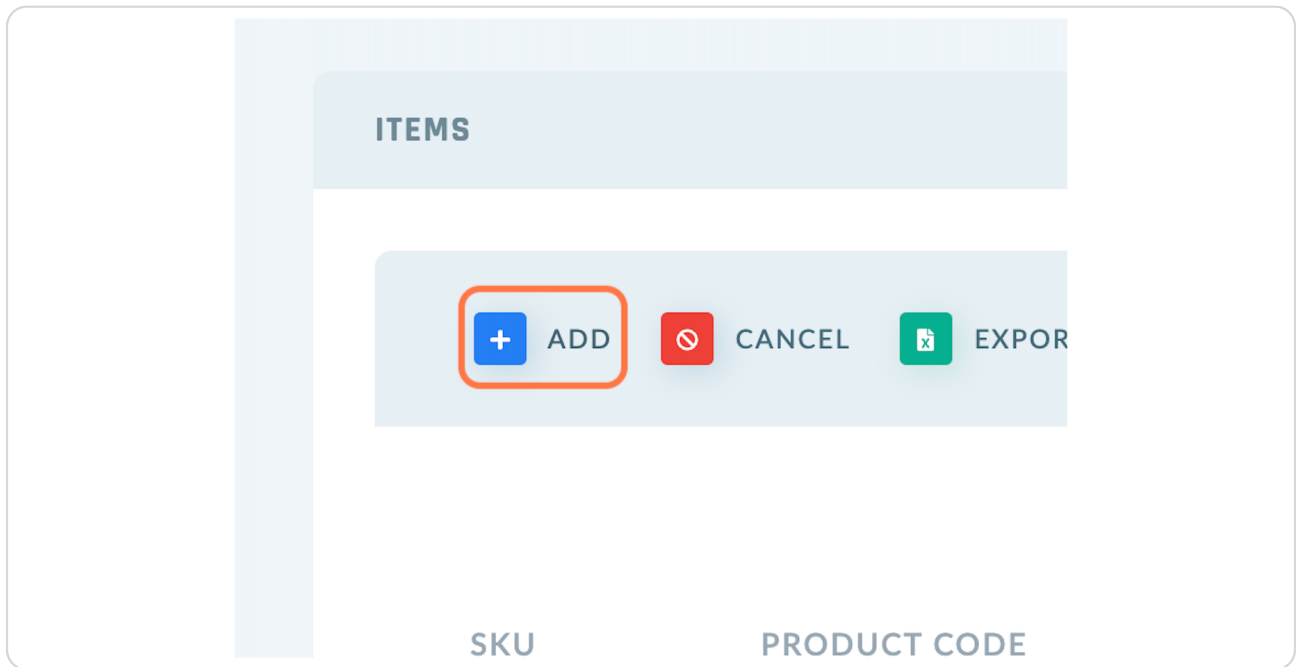
STEP 12

Let's add some product to the sales order



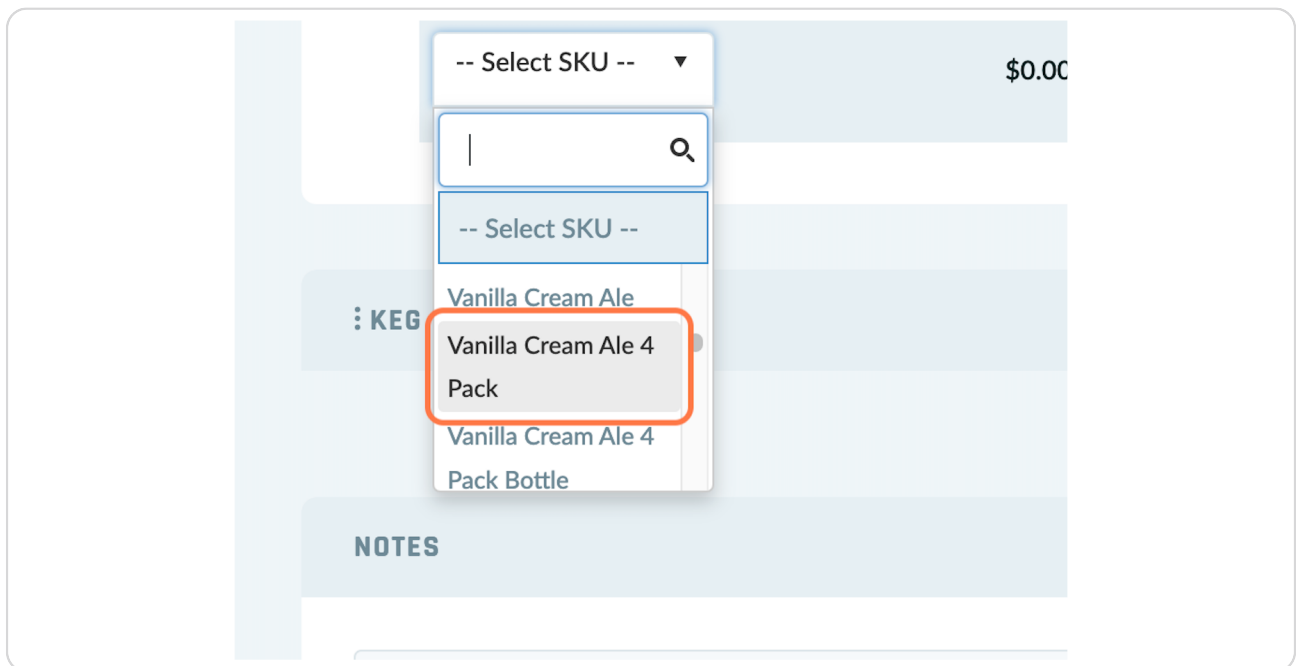
STEP 13

Click on **ADD**



STEP 14

Select the SKU that you are selling



STEP 15

The price will auto populate if it was defined in 'Setup: Product SKUs'

The appropriate tax code will auto populate if you specified a default tax code for the category which this SKU belongs to in 'Setup: Categories'

You can apply a discount if necessary. This discount will be expressed as a percentage.

The screenshot displays a software interface with a table of items. The table has the following columns: SKU, PRODUCT CODE, PRICE, DISCOUNT, SALE, AMOUNT, TAX, and NOTES. A red box highlights the 'DISCOUNT' column for the 'Vanilla Cream Ale 4 Pack' row. Above the table, there are buttons for '+ ADD', 'CANCEL', and 'EXPORT'. Below the table, there are sections for 'INTERNAL RULES', 'ITEMS', 'KEG DEPOSIT REFUNDS', and 'NOTES'. A yellow circular icon is visible in the bottom right corner of the interface.

SKU	PRODUCT CODE	PRICE	DISCOUNT	SALE	AMOUNT	TAX	NOTES
Vanilla Cream Ale 4 Pack		\$14.00		1	\$14.00	Wholesale	

STEP 16

Specify the quantity that you are selling

QUANTITY				
PRICE	DISCOUNT	SALE	AMOUNT	TAX
\$14.00	10.00%	12	\$12.60	Wholesale

STEP 17

You can repeat these steps until all required product has been added to the sales order

BrewNinja Setup Inventory Production Transactions Reports Brew Ninja

PREVIOUS SALES BOB'S BAR

INTERNAL NOTES

ITEMS

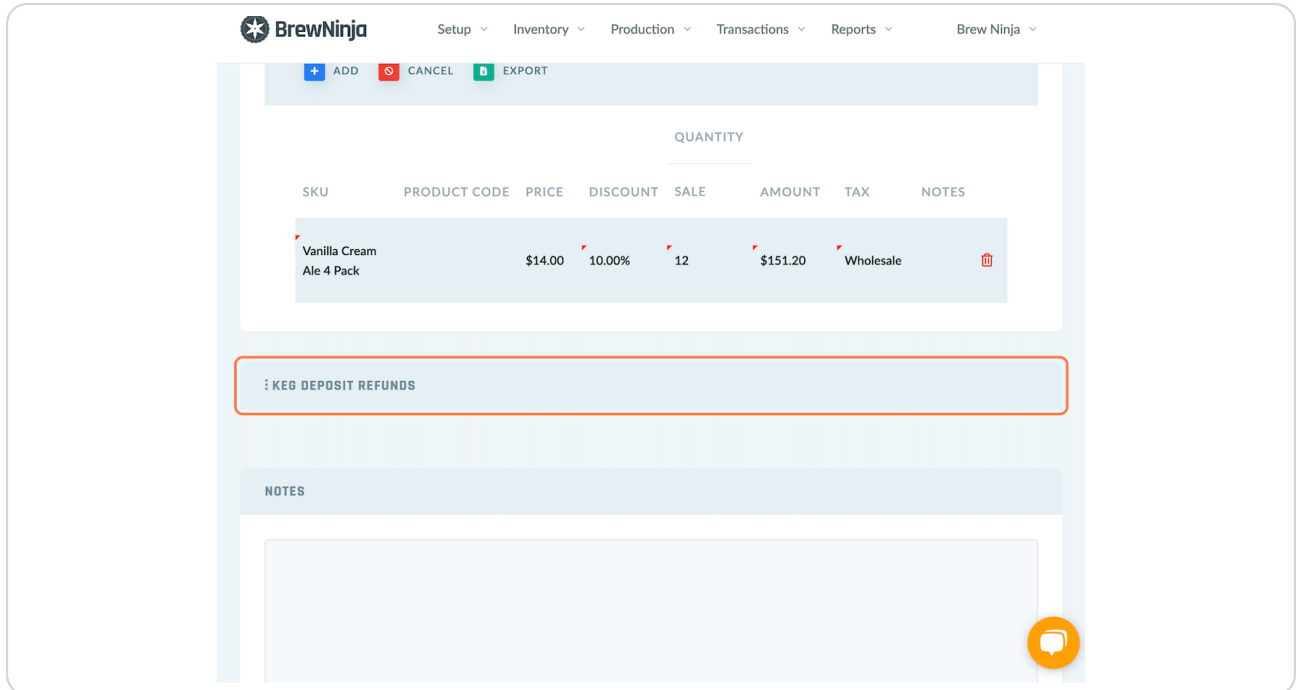
+ ADD - CANCEL EXPORT

QUANTITY							
SKU	PRODUCT CODE	PRICE	DISCOUNT	SALE	AMOUNT	TAX	NOTES
Very Vanilla 50L Keg		\$100.00		1	\$100.00	Wholesale	
Vanilla Cream Ale 4 Pack		\$14.00	10.00%	12	\$151.20	Wholesale	

STEP 18

If you would like to issue a refund for a previously returned keg, you can do so here

*Note: In order for a keg refund to be applied, the must already be marked as 'returned' this can be handled either through the delivery process, or the 'Rentals/Deposits' page. Check out our literature on these topics to learn more.

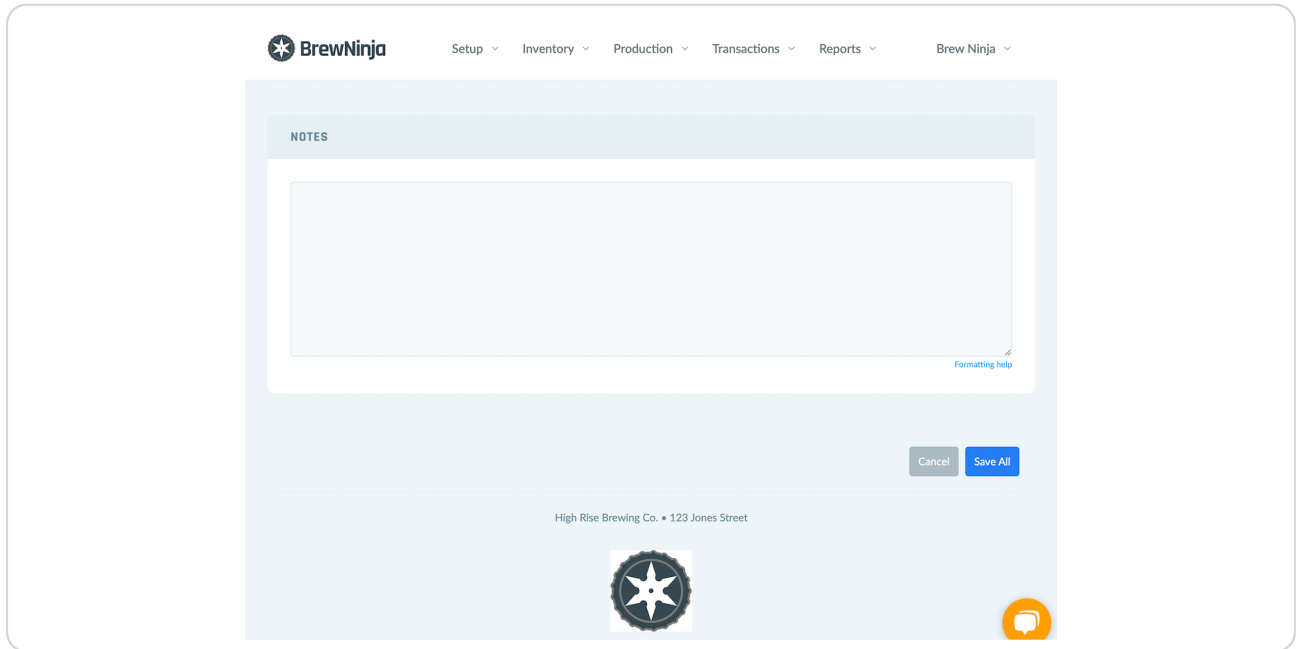


The screenshot displays the BrewNinja web application interface. At the top, there is a navigation bar with the BrewNinja logo and several menu items: Setup, Inventory, Production, Transactions, Reports, and Brew Ninja. Below the navigation bar, there are three buttons: ADD (blue), CANCEL (red), and EXPORT (green). The main content area features a table with the following columns: SKU, PRODUCT CODE, PRICE, DISCOUNT, SALE, AMOUNT, TAX, and NOTES. The table contains one row of data for 'Vanilla Cream Ale 4 Pack' with a price of \$14.00, a discount of 10.00%, a sale quantity of 12, an amount of \$151.20, and a tax of Wholesale. Below the table, there is a section titled 'KEG DEPOSIT REFUNDS' which is highlighted with a red border. At the bottom of the interface, there is a 'NOTES' section and a chat icon in the bottom right corner.

SKU	PRODUCT CODE	PRICE	DISCOUNT	SALE	AMOUNT	TAX	NOTES
Vanilla Cream Ale 4 Pack		\$14.00	10.00%	12	\$151.20	Wholesale	

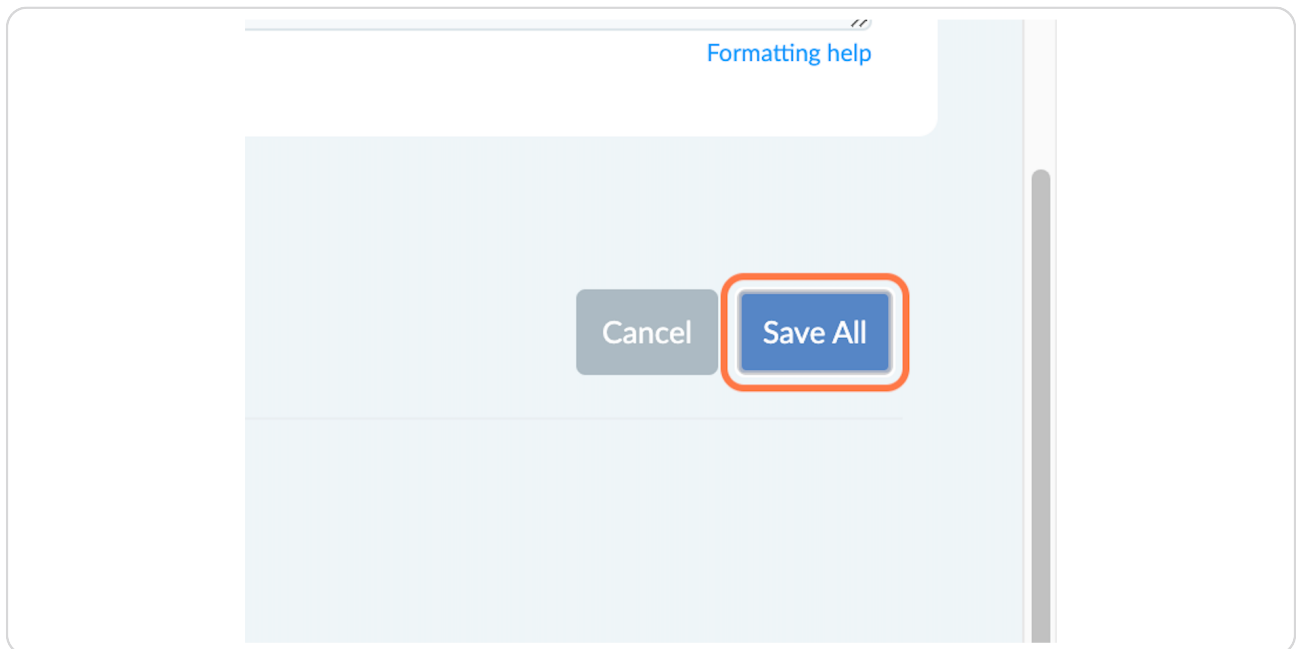
STEP 19

Add any additional notes



STEP 20

Click on Save All



STEP 21

You have now created a draft of this sales order

At this point, you can view details relating to your sale.

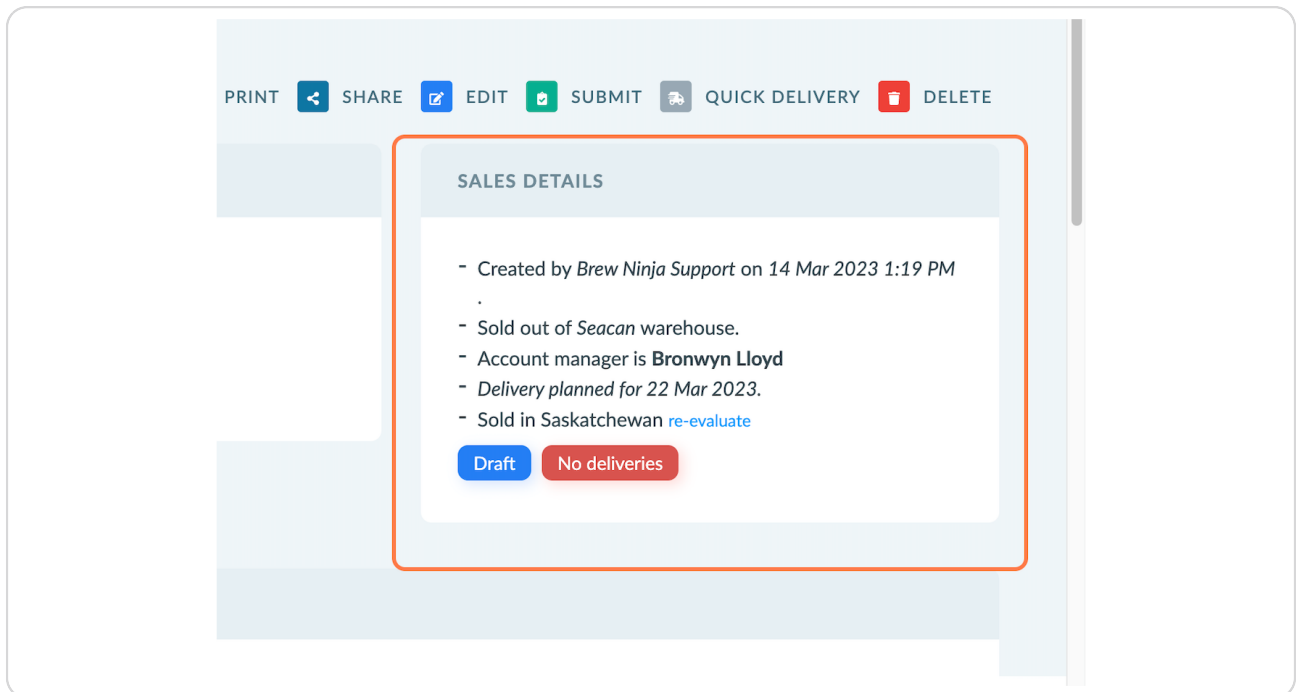
The blue icon on the left hand side references the sales order status.






The red icon on the right references the delivery status.

From this point you can choose whether you want to go through a more detailed delivery recording process or not. If you are working with a distributor or don't need more detail in the delivery process, the Quick Delivery function is a great option.

Clicking this button will remove all inventory on the order from inventory, and if you are connected to Quickbooks, an invoice can be created at this time too - depending on your configuration settings.

If you would like to record more detail throughout the delivery process keep reading on. We typically suggest this more detailed method when doing self distribution.



PRINT  SHARE  EDIT  SUBMIT  QUICK DELIVERY  DELETE

SALES DETAILS

- Created by *Brew Ninja Support* on 14 Mar 2023 1:19 PM
-
- Sold out of *Seacan* warehouse.
- Account manager is **Bronwyn Lloyd**
- *Delivery planned for 22 Mar 2023.*
- Sold in Saskatchewan [re-evaluate](#)

Draft **No deliveries**

STEP 22

You can see a summary of everything you are selling, what you have on hand, what you have on all outstanding orders, and the quantity being sold on this particular order.

BrewNinja										
Setup ▾ Inventory ▾ Production ▾ Transactions ▾ Reports ▾ Brew Ninja ▾										
ITEMS										
QUANTITY										
SKU	PRODUCT CODE	PRICE	COST	DISCOUNT	ON HAND	ON ORDERS	SALE	AMOUNT	TAX	NOTES
Very Vanilla 50L Keg		\$100.00	\$12.71	-51	13	1	1	\$100.00	Wholesale	
Vanilla Cream Ale 4 Pack		\$14.00	\$9.00	10.00%	50	153	12	\$151.20	Wholesale	

KEG DEPOSITS					
MATERIAL	SERIAL #	DEPOSIT	OUT	RETURNED	REFUNDED

STEP 23


If you are selling a SKU which uses a rental item with a deposit amount associated, the deposit will be charged automatically here.

In this case, the 'Very Vanilla 50L Keg' uses a '50L Keg' as a packaging material. This material is set up as a 'Rental' and has a wholesale deposit of \$100 built in

SKU	PRODUCT CODE	PRICE	COST	DISCOUNT	ON HAND	ON ORDERS	SALE	AMOUNT	TAX	NOTES
Very Vanilla 50L Keg		\$100.00	\$12.71		-51	13	1	\$100.00	Wholesale	
Vanilla Cream Ale 4 Pack		\$14.00	\$9.00	10.00%	50	153	12	\$151.20	Wholesale	

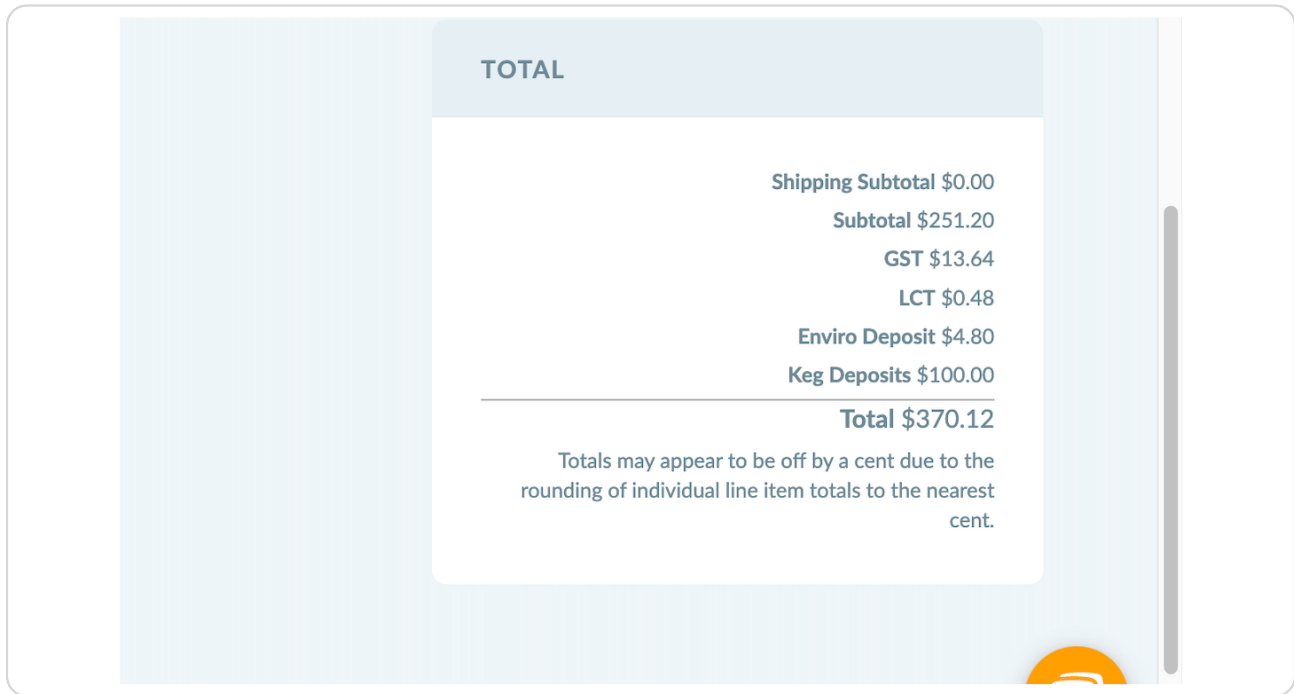
KEG DEPOSITS					
MATERIAL	SERIAL #	DEPOSIT	OUT	RETURNED	REFUNDED
50L Keg		\$100.00			

: DELIVERIES



STEP 24

Towards the bottom of the page you can see a pricing breakdown for the order



The screenshot shows a pricing breakdown for an order. The word "TOTAL" is displayed at the top of the breakdown box. The items and their values are listed as follows:

Shipping Subtotal	\$0.00
Subtotal	\$251.20
GST	\$13.64
LCT	\$0.48
Enviro Deposit	\$4.80
Keg Deposits	\$100.00
Total	\$370.12

Below the table, a note states: "Totals may appear to be off by a cent due to the rounding of individual line item totals to the nearest cent." A vertical scrollbar is visible on the right side of the breakdown box, and a portion of an orange circular logo is visible at the bottom right corner of the screenshot.

STEP 25

You have several options now that you've created a draft of your sales order

Print: Allows you to print the sales order

Share: Allows you to share the sales order via email

Edit: Allows you to make further changes to the sales order

Submit: Updates the status of the sales order to 'Pending'. This is the first step in a longer, more detailed delivery process – read on to learn more

Quick Deliver: Allows you to quickly mark all product on the sales order as 'delivered'. Inventory would be deducted at this point.

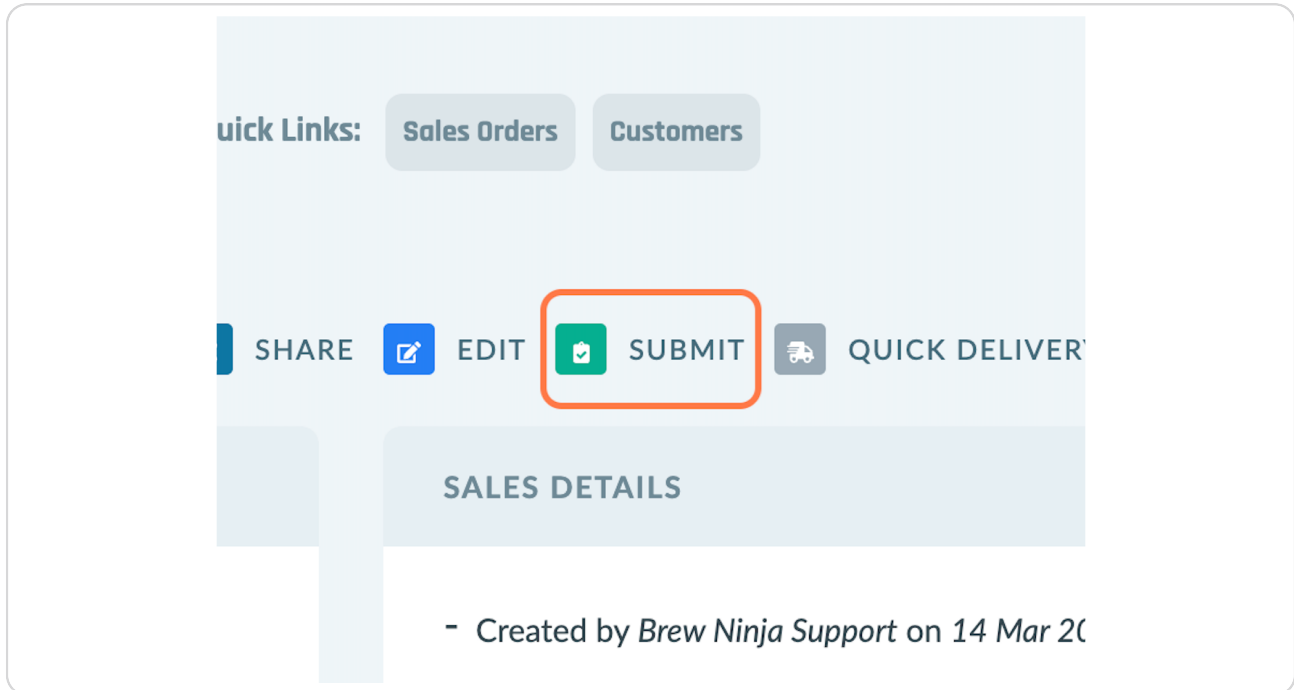
The screenshot displays the BrewNinja web application interface for a sales order. At the top, the navigation bar includes the BrewNinja logo and menu items: Setup, Inventory, Production, Transactions, Reports, and Brew Ninja. The main header shows the sales order ID #SO-0093-BN and quick links for Sales Orders and Customers. A toolbar with a red border contains the following actions: PRINT, SHARE, EDIT, SUBMIT, QUICK DELIVERY, and DELETE. The 'SOLD TO' section identifies the customer as Bob's Bar, located at 10 Tennant Street, Craven, with PO# 582. The 'SALES DETAILS' section provides a timeline of events: created by support on 14 Mar 2023, sold out of Seacan warehouse, managed by Bronwyn Lloyd, with a delivery planned for 22 Mar 2023, and a note about being sold in Saskatchewan. At the bottom of the details, there are buttons for 'Draft' and 'No deliveries'. The 'ITEMS' section is partially visible, showing a 'QUANTITY' column. A chat icon is located in the bottom right corner of the interface.

STEP 26

Click on **SUBMIT**

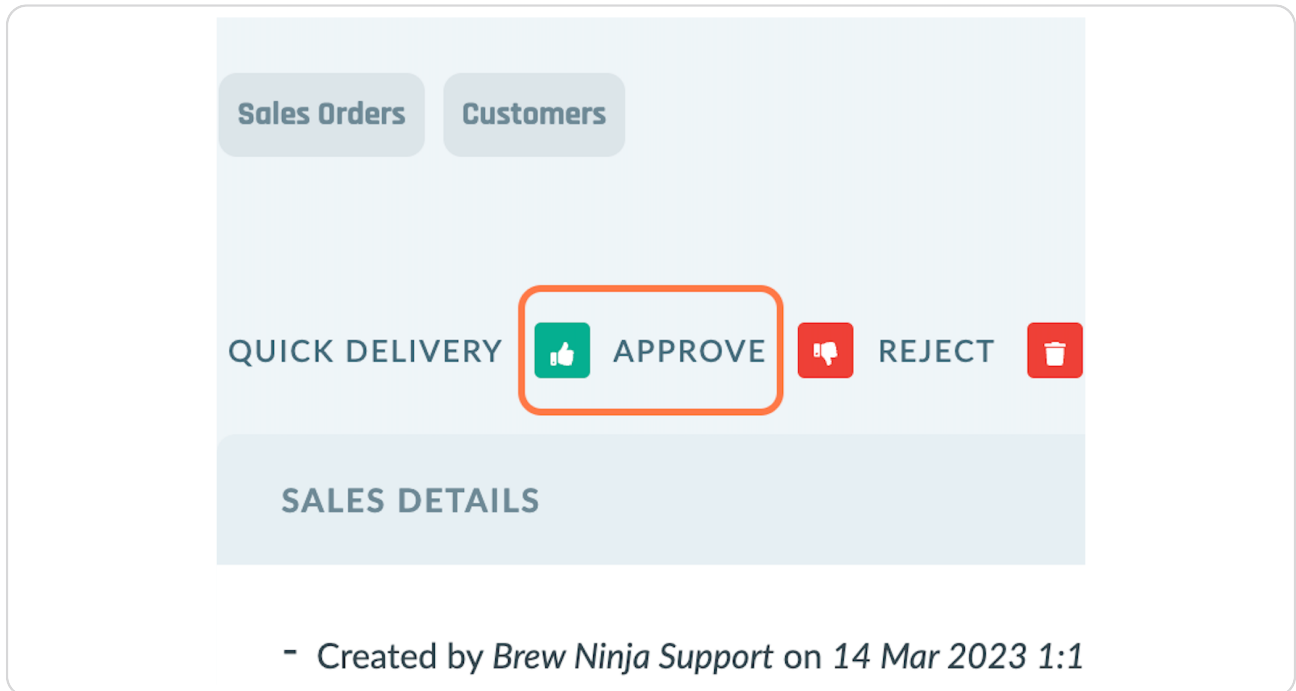
The sales order is submitted for approval at this point.

If you have access, you can go ahead and approve the order yourself, alternatively, it may need to be approved by another member of your team.



STEP 27

If you have access, you can go ahead and approve the order yourself, alternatively, it may need to be approved by another member of your team.



STEP 28

The sales order has now been approved and a delivery has been scheduled.

Check out our 'Recording Deliveries in Brew Ninja' workflow to learn more about processing deliveries.

The final step is to finalize your sales order by clicking 'Complete'. You won't be able to edit your sales order once it has been completed, so we typically suggest hitting 'complete' after the delivery has taken place. But if you would like to lock down your sales order at this point, that option is there too.

A few things to note: Inventory is deducted at one of two times, either A) When the order has been marked as 'Delivered', or B) When the order is marked 'Complete, whichever happens first.

If you are connected to Quickbooks, the sales order will be pushed to Quickbooks at one of two times, depending on your account configuration. The invoice can be created either when product is recorded as 'Delivered' or when the sales order is marked 'Complete'

The screenshot displays the BrewNinja web application interface for a sales order. At the top, there is a navigation menu with options: Setup, Inventory, Production, Transactions, Reports, and Brew Ninja. A yellow warning banner at the top states: "The following products do not have the full quantity delivered: (12) Vanilla Cream Ale 4 Pack". Below this, the sales order is identified as "Sales Order #SO-0093-BN" with quick links for "Sales Orders" and "Customers". A toolbar contains several action buttons: "Undo Approval / Rejection", "PRINT...", "SHARE", "EDIT", "ADD DELIVERY", "COMPLETE", and "DELETE". The "COMPLETE" button is highlighted with a green checkmark. The main content area is divided into two sections: "SOLD TO" and "SALES DETAILS". The "SOLD TO" section shows the customer name "Bob's Bar" and address "10 Tennant Street Craven" with PO# 582. The "SALES DETAILS" section lists several events: "Created by Brew Ninja Support on 14 Mar 2023 1:19 PM", "Approved by Brew Ninja Support on 14 Mar 2023 1:22 PM", "Sold out of Seacan warehouse.", "Account manager is Bronwyn Lloyd", "Delivery planned for 22 Mar 2023.", and "Sold in Saskatchewan re-evaluate". At the bottom of the "SALES DETAILS" section, there are two buttons: "Approved" and "Scheduled", both of which are highlighted with a red box. The "ITEMS" section is partially visible at the bottom of the screen.

