Creating a Sales Order in Brew Ninja

28 Steps View most recent version

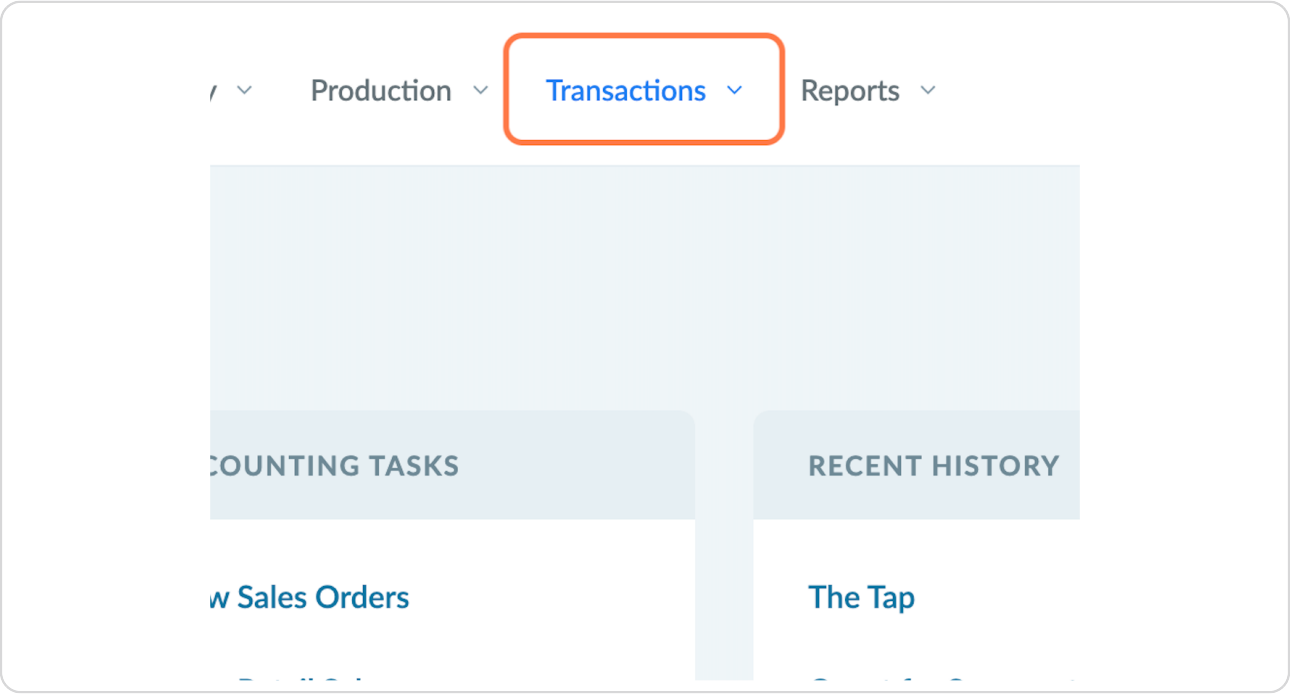
Created by	Creation Date	Last Updated
Bronwyn Lloyd	March 14, 2023	May 16, 2023

STEP 1

Go to app.brewninja.net

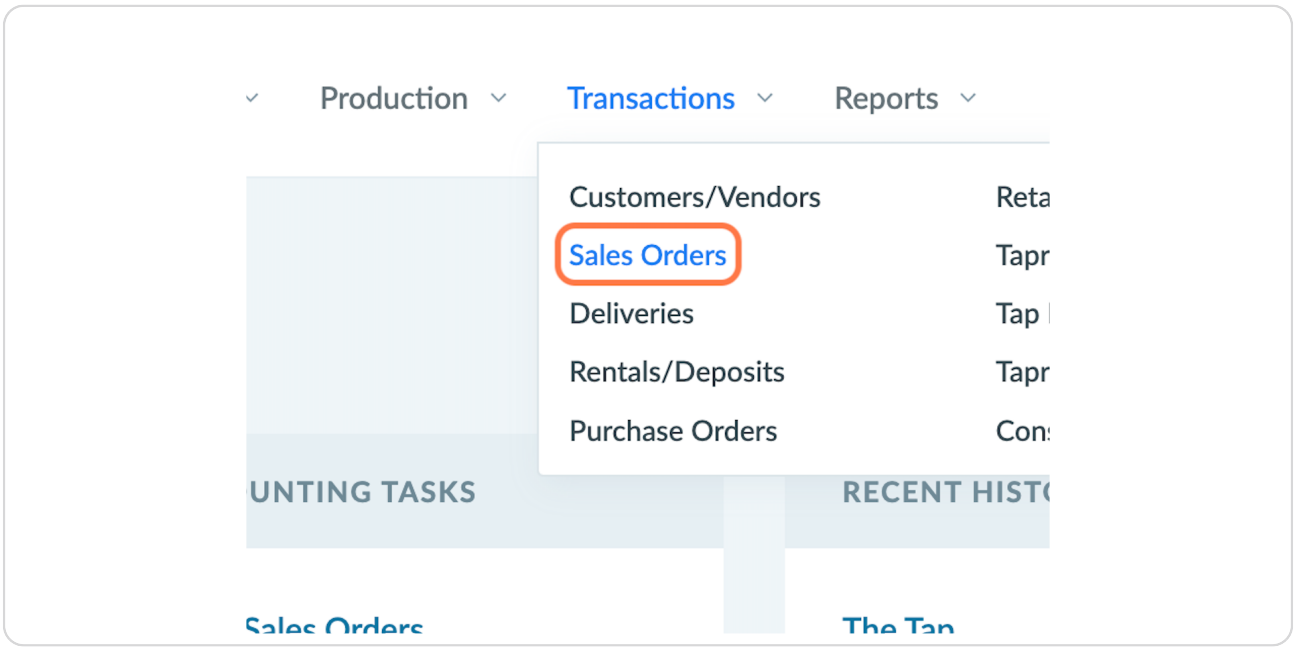
STEP 2

Click on Transactions



STEP 3

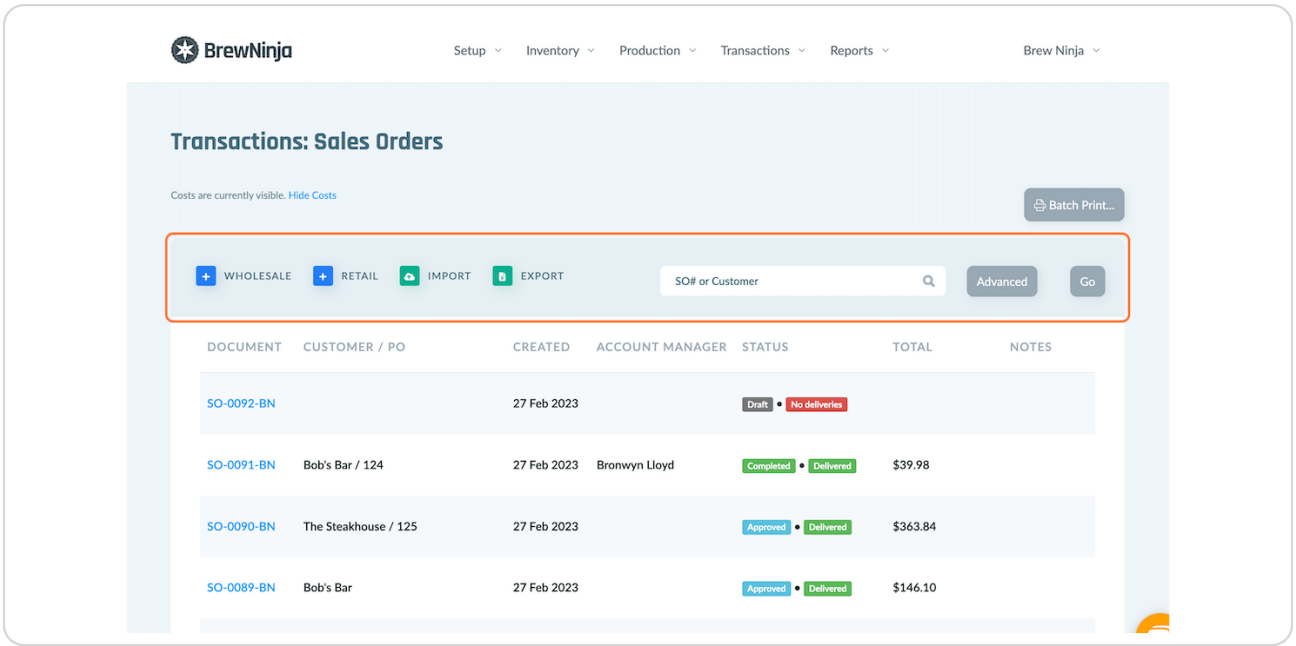
Click on Sales Orders



STEP 4

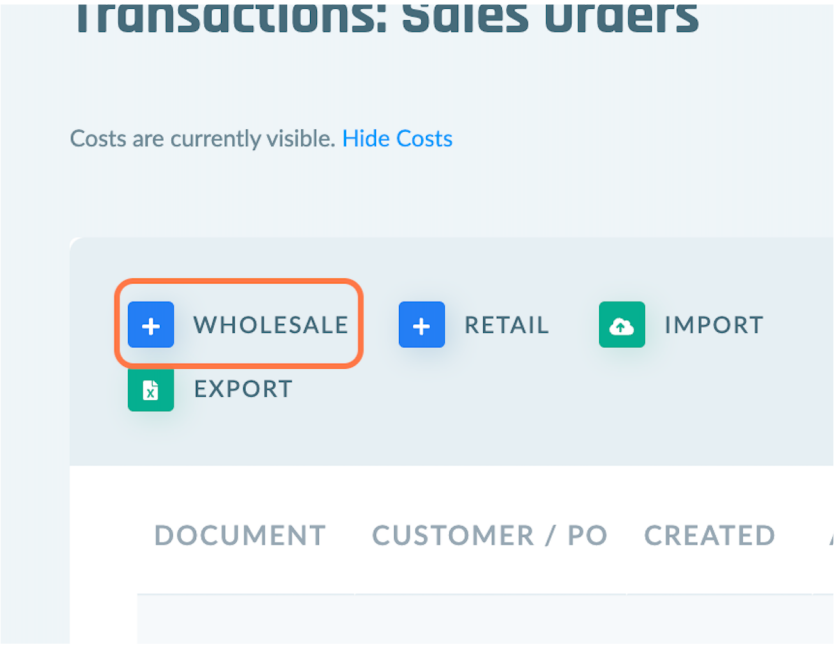
You can choose to create either a wholesale, or retail sales order

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



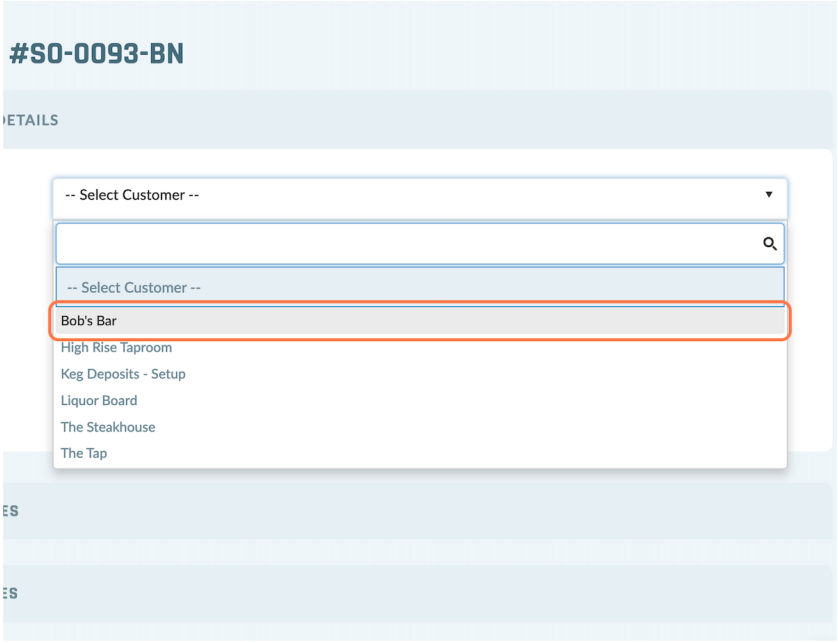
STEP 5

Click on WHOLESALE



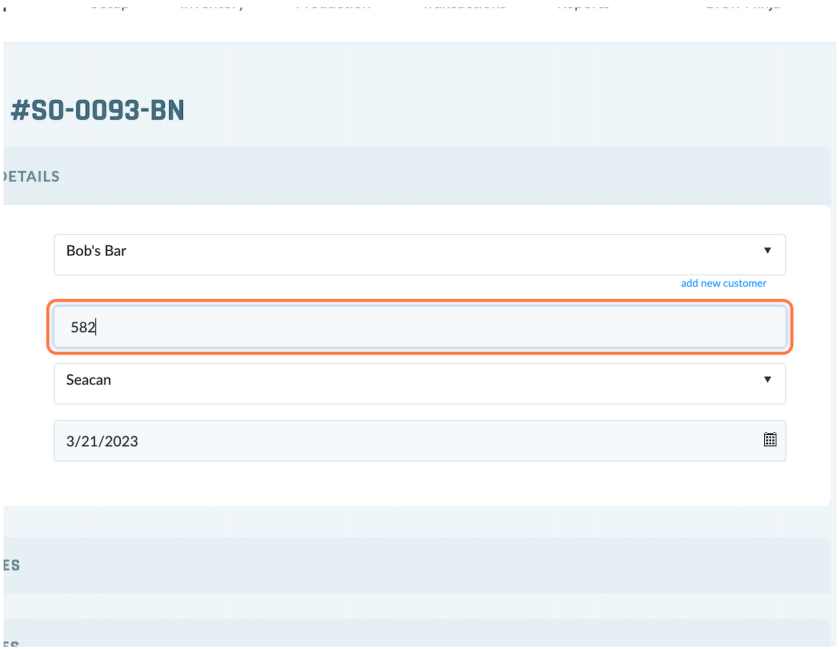
STEP 6

Select the customer that you are selling product to



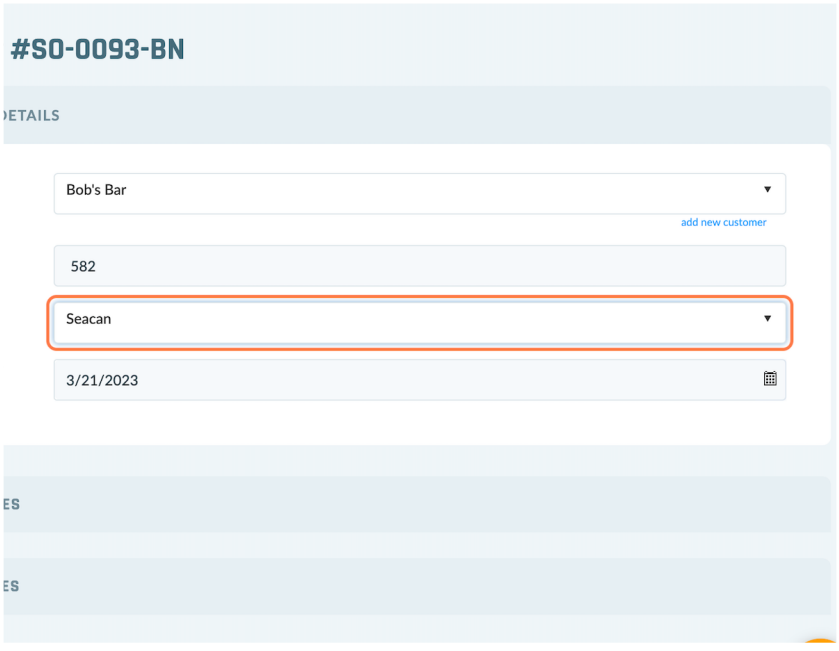
STEP 7

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



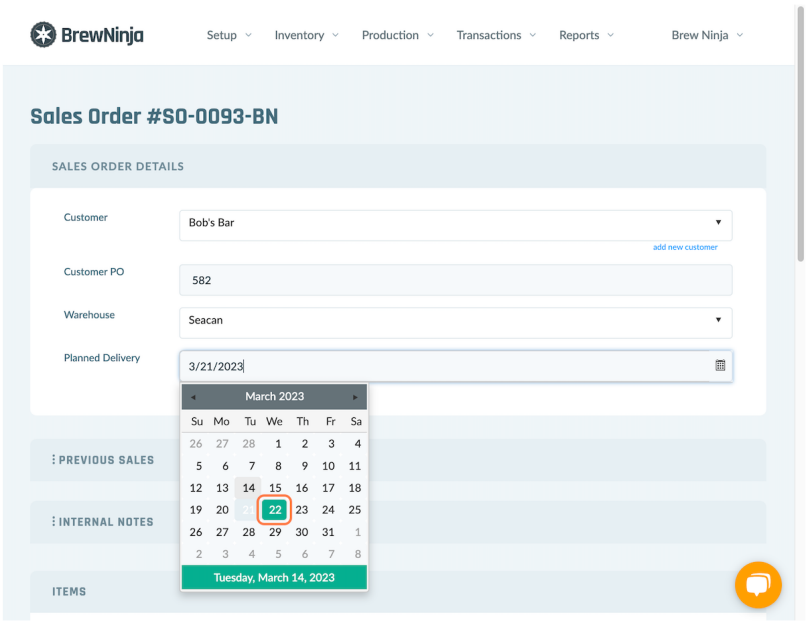
STEP 8

Select the warehouse that you would like to deduct inventory from



STEP 9

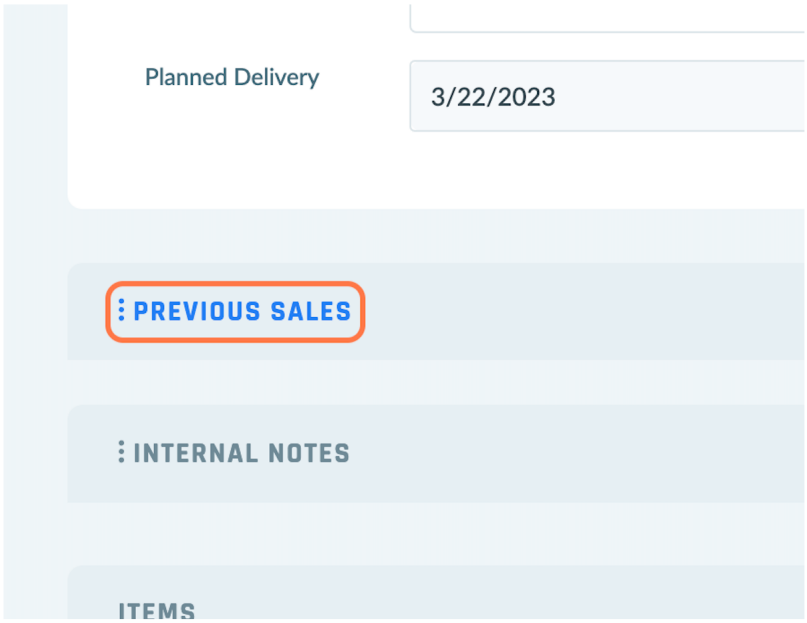
Select your planned delivery date



STEP 10

PREVIOUS SALES

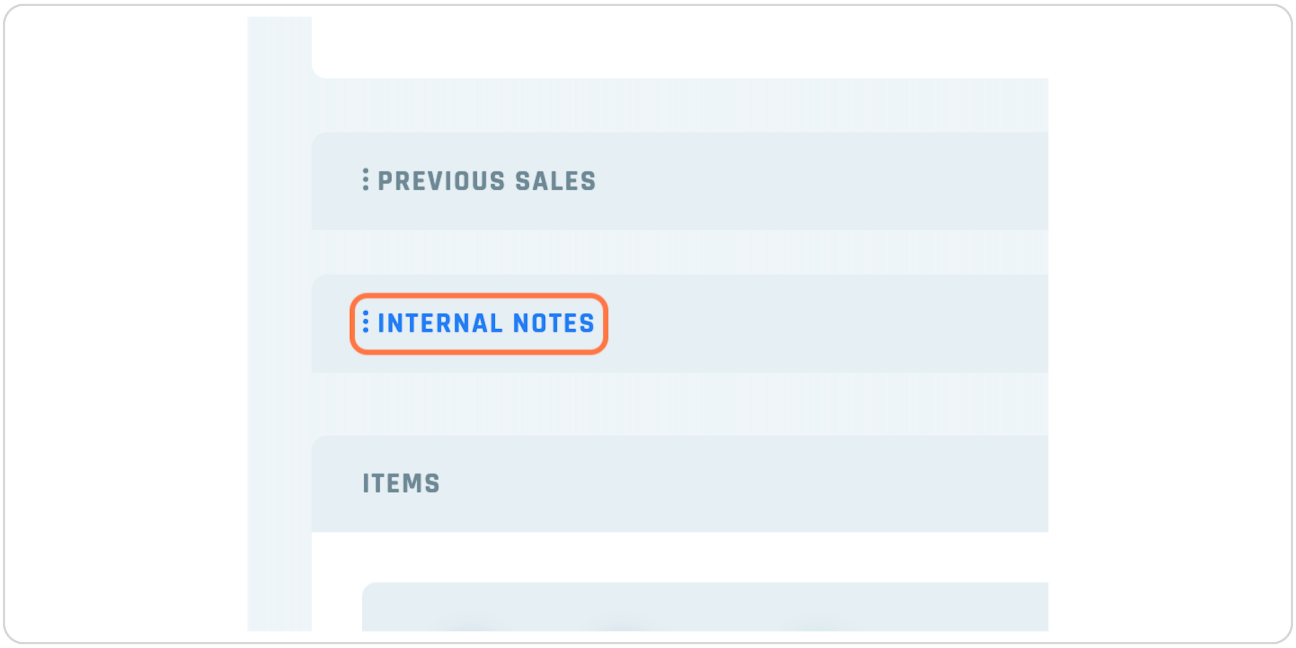
Here you can easily access and open any previous sales to this customer



STEP 11

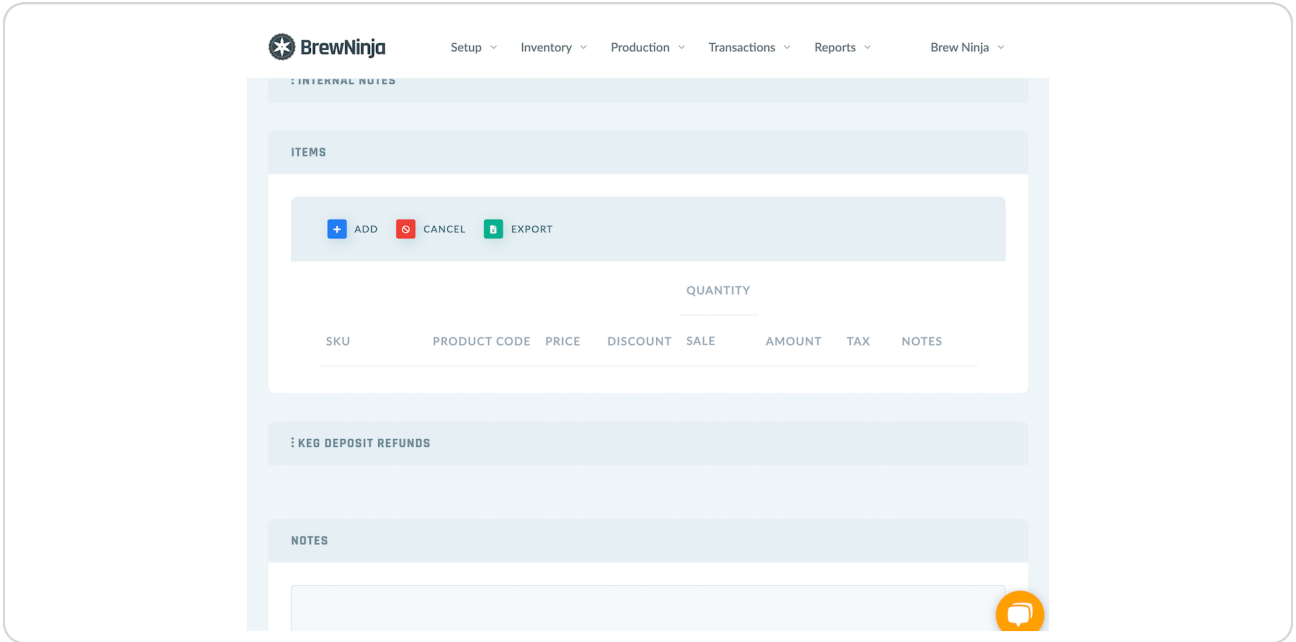
INTERNAL NOTES

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



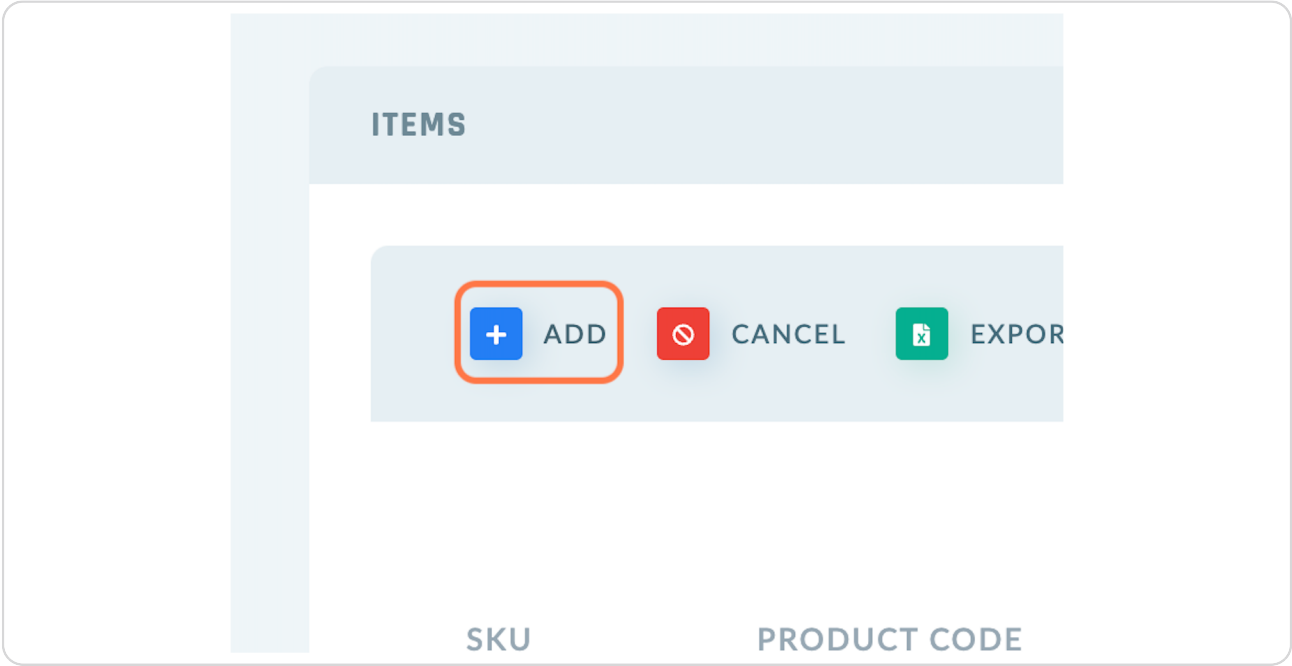
STEP 12

Let's add some product to the sales order



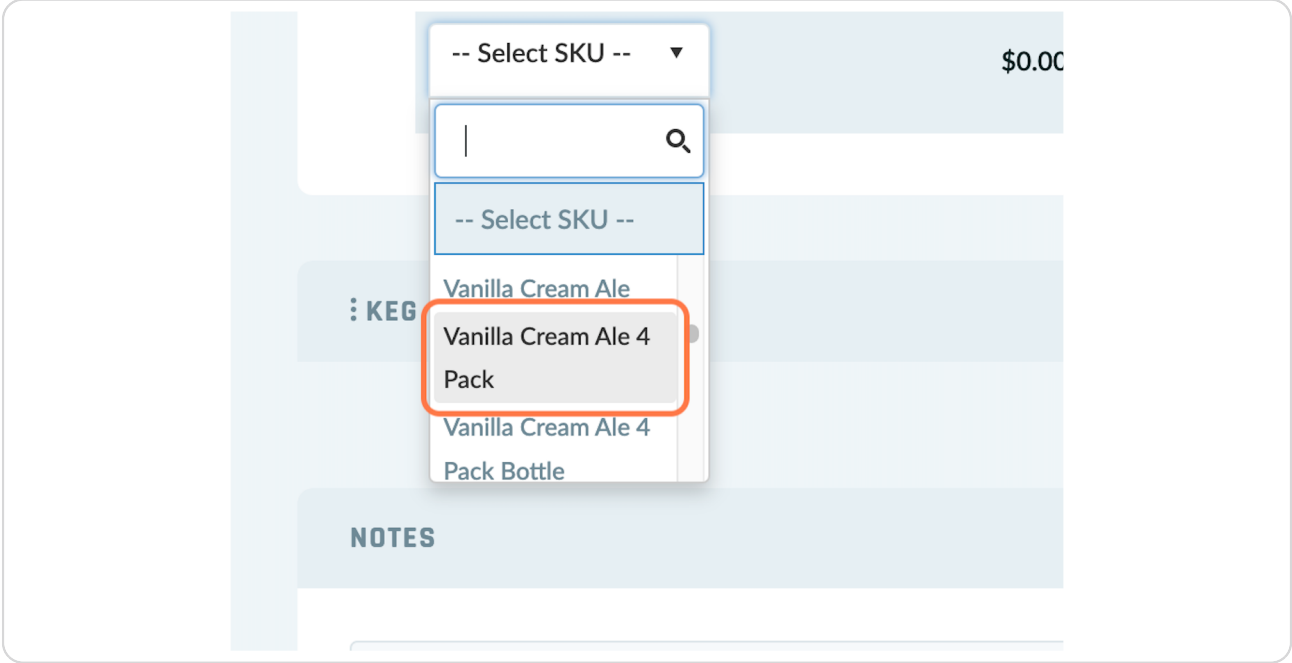
STEP 13

Click on ADD



STEP 14

Select the SKU that you are selling

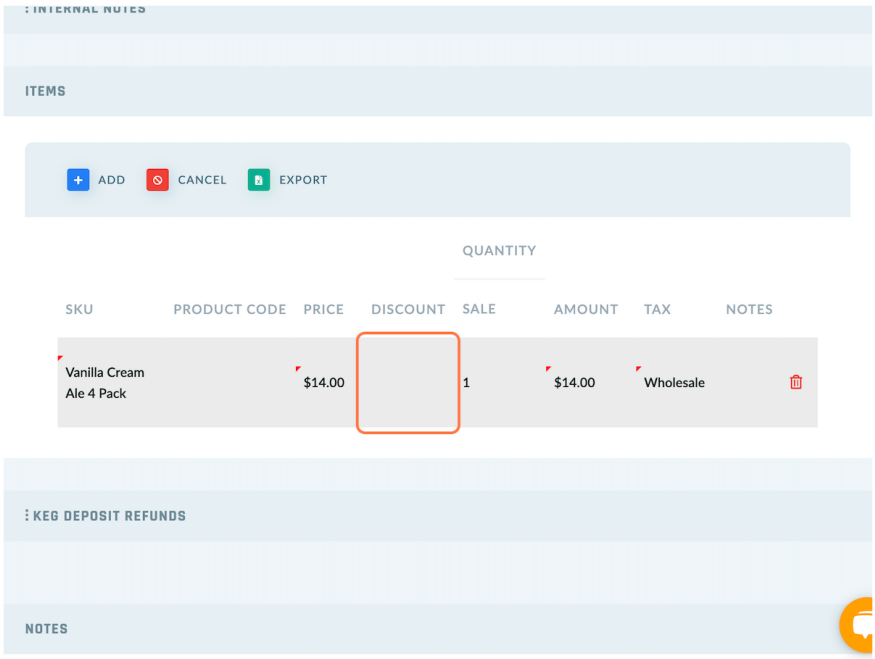


STEP 15

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

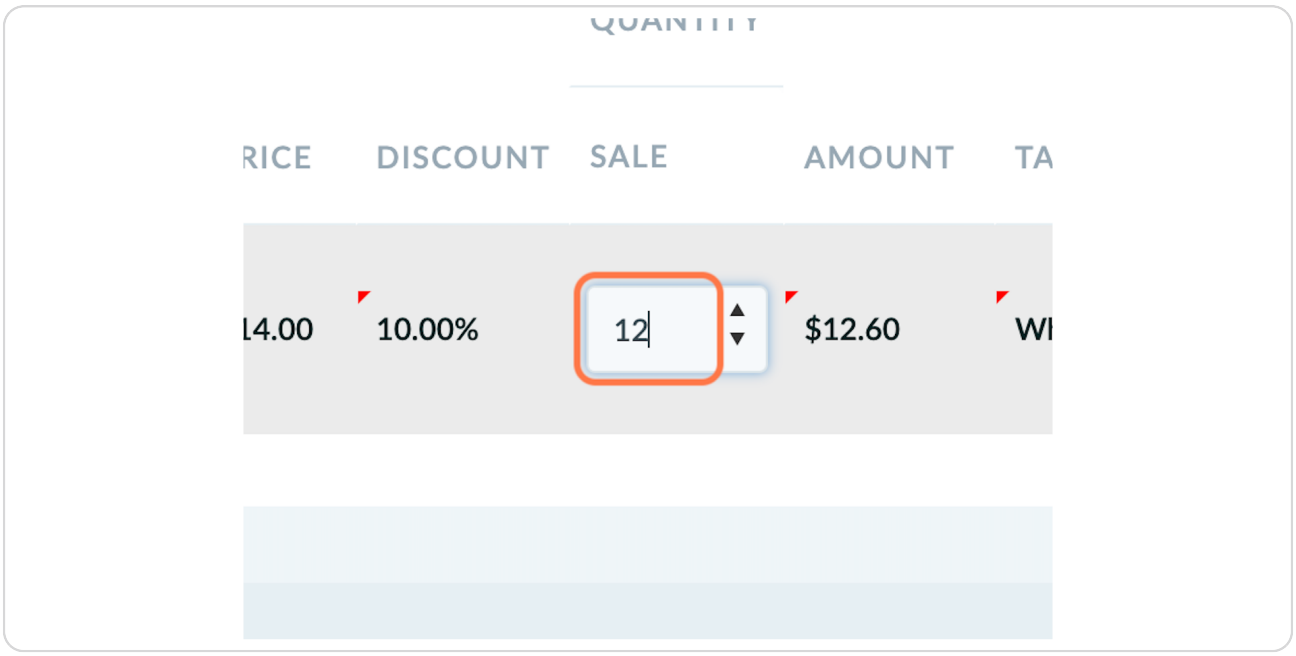
The appropriate tax code will auto populate if you specified a default tax code for the category which this SKU belongs to in 'Setup: Categories'

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



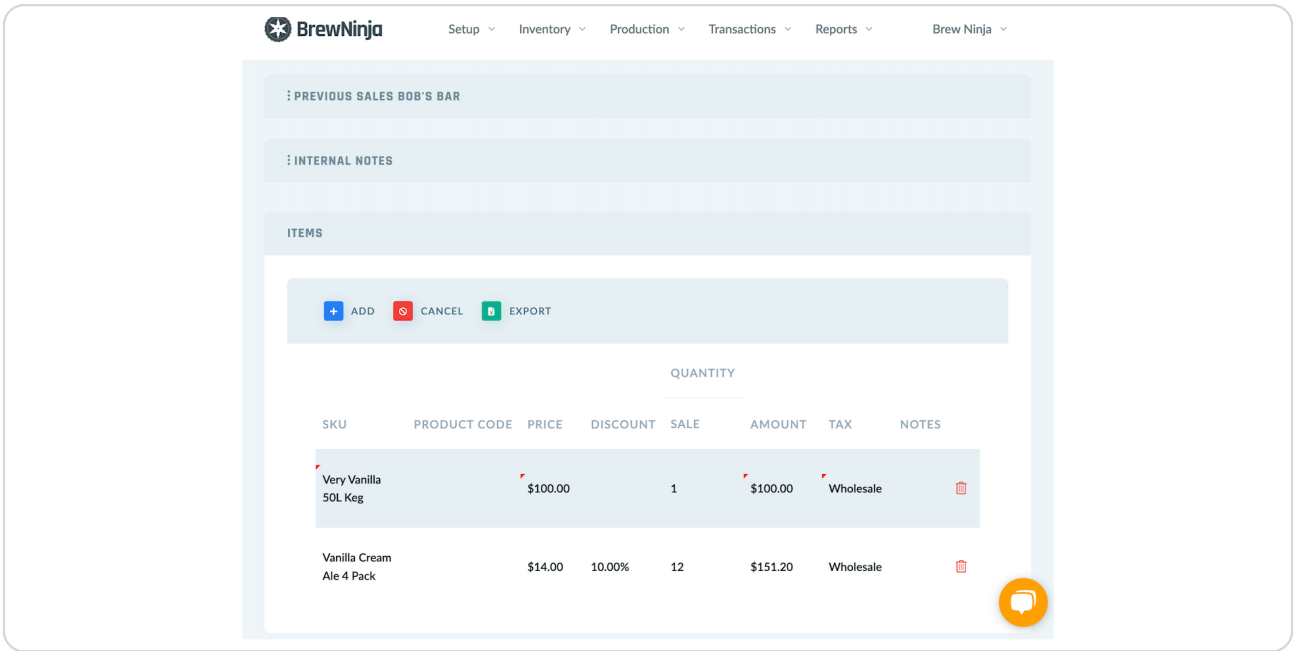
STEP 16

Specify the quantity that you are selling



STEP 17

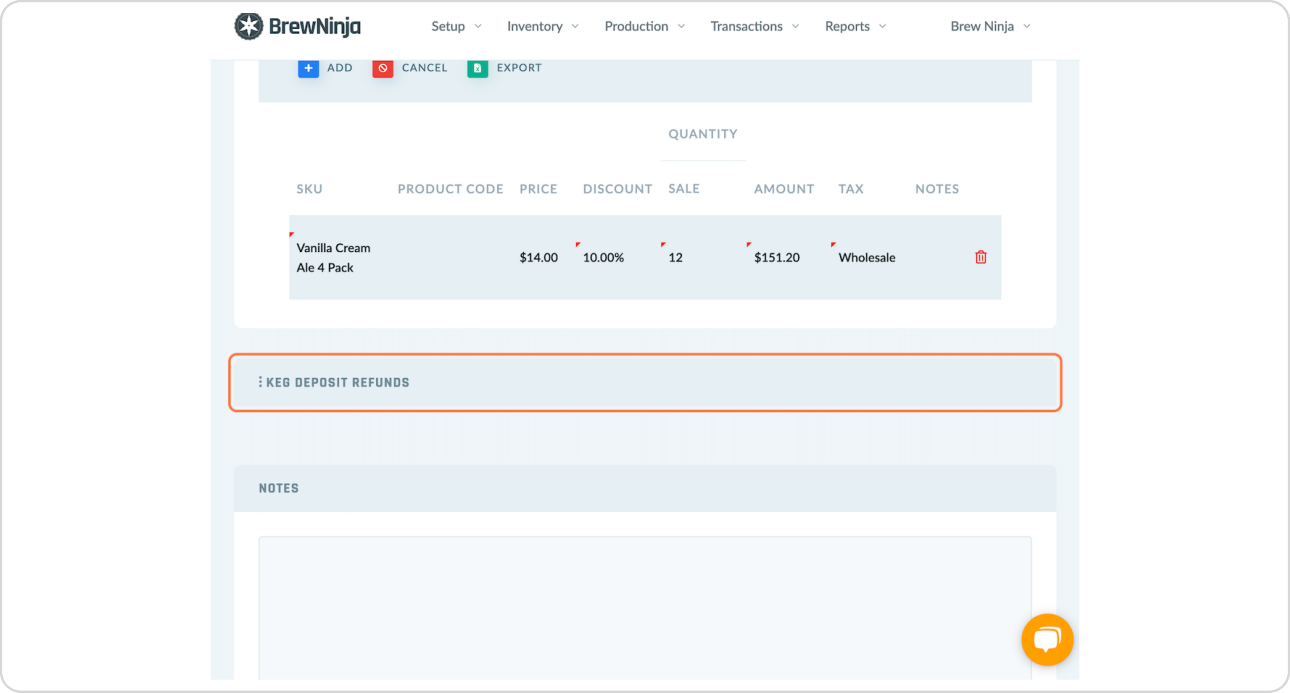
You can repeat these steps until all required product has been added to the sales order



STEP 18

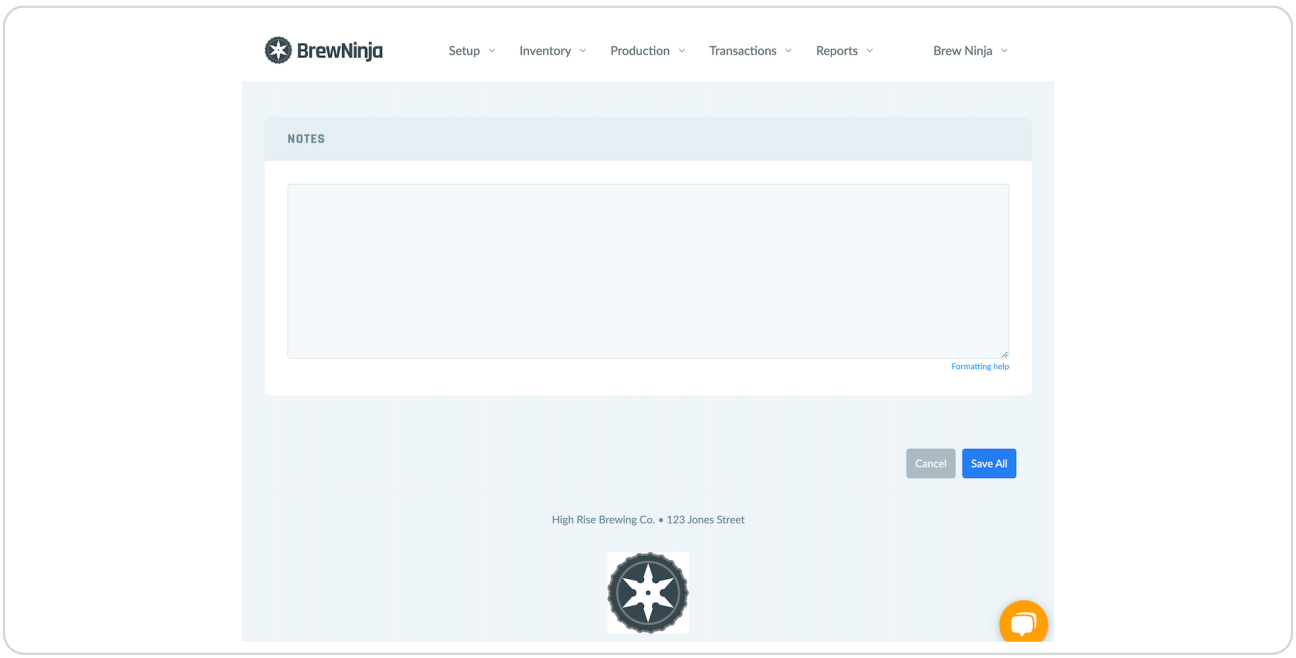
If you would like to issue a refund for a previously returned keg, you can do so here

*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.



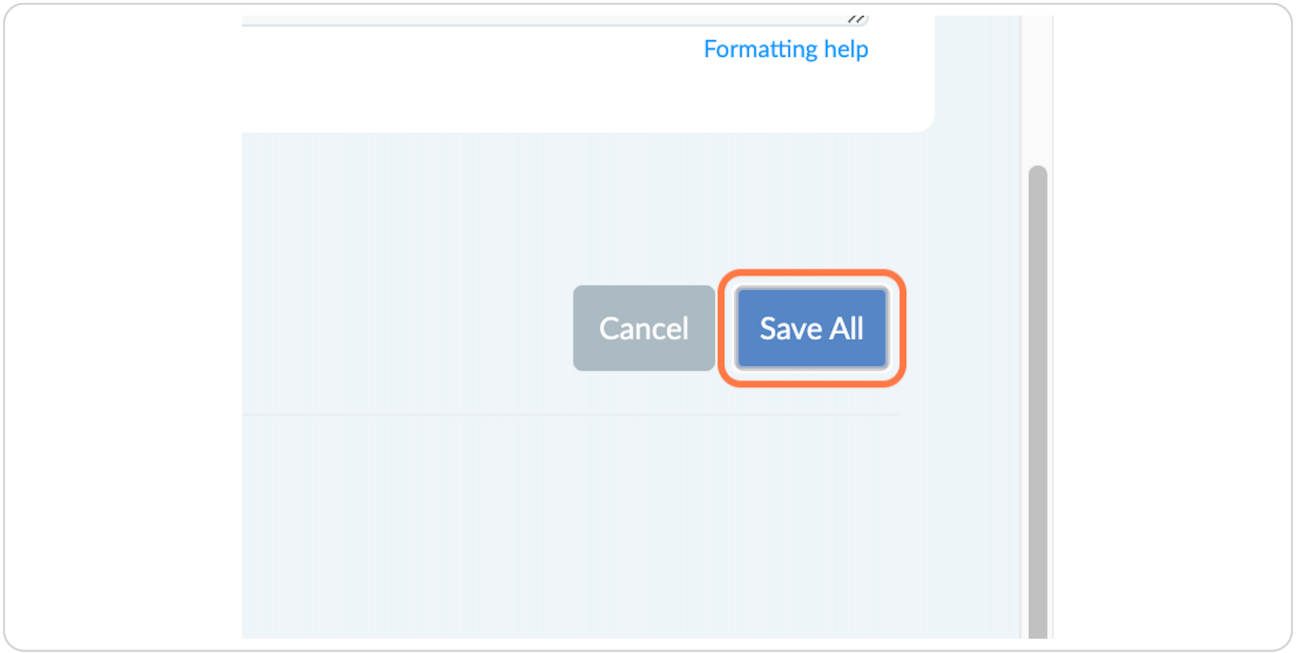
STEP 19

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.

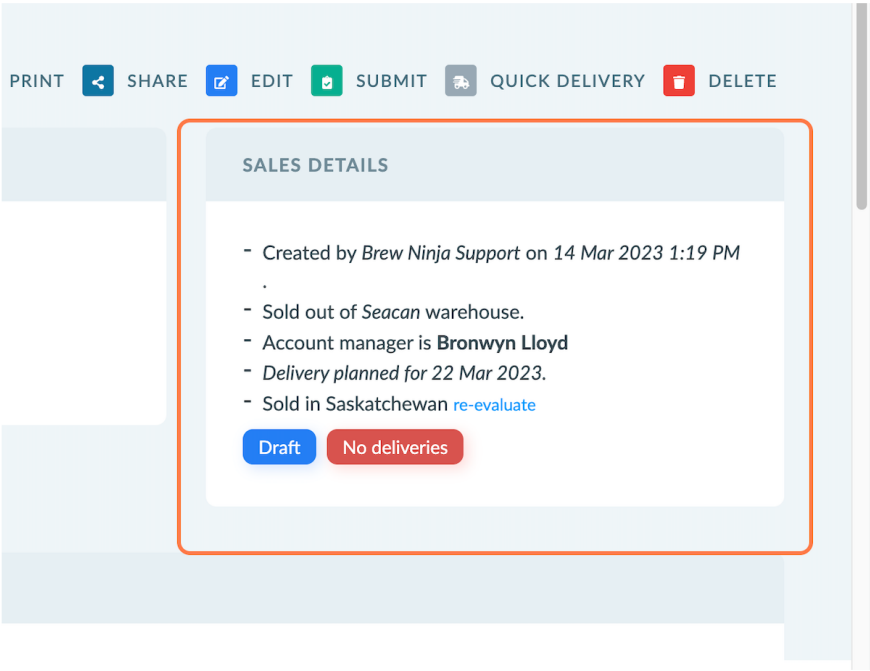
The blue icon on the left hand side references the sales order status.

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.

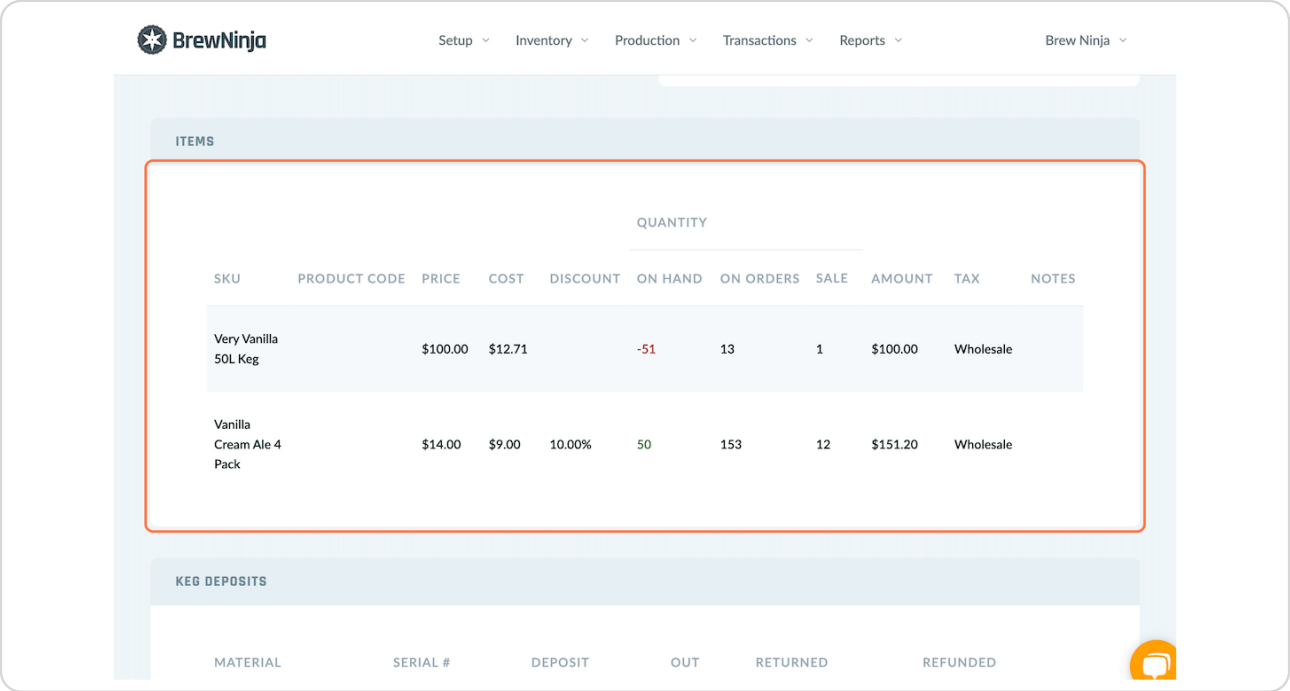
Clicking this button will remove all inventory on the order from inventory, and if you are connected to Quickbooks, an invoice can be created at this time too - depending on your configuration settings.

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.



STEP 22

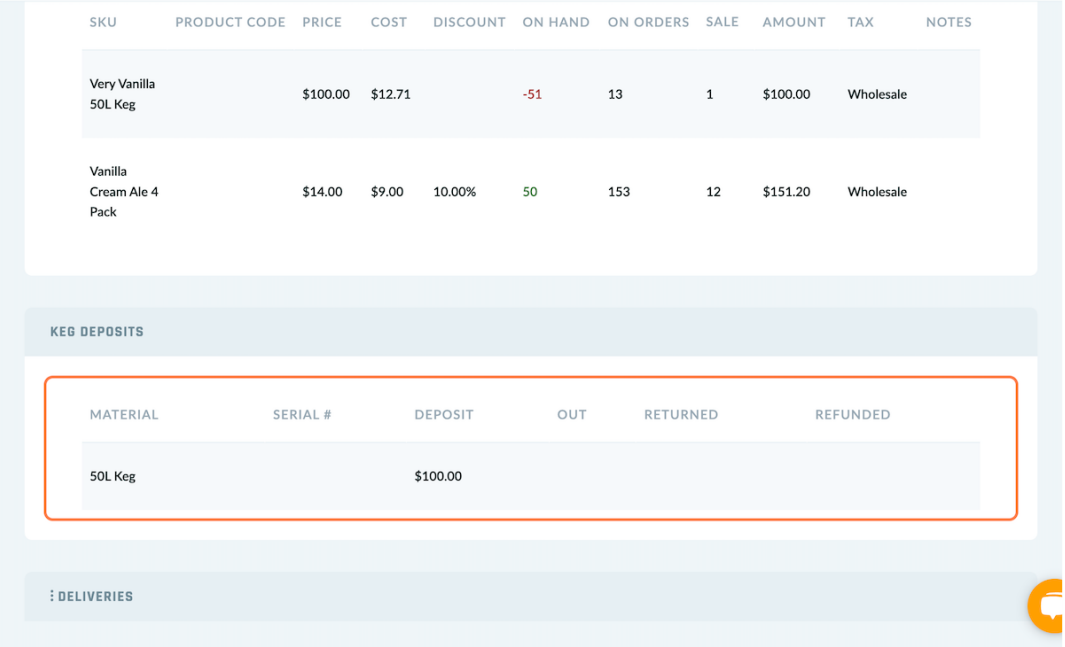
You can see a summary of everything you are selling, what you have on hand, what you have on all outstanding orders, and the quantity being sold on this particular order.



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



STEP 24

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

STEP 25

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

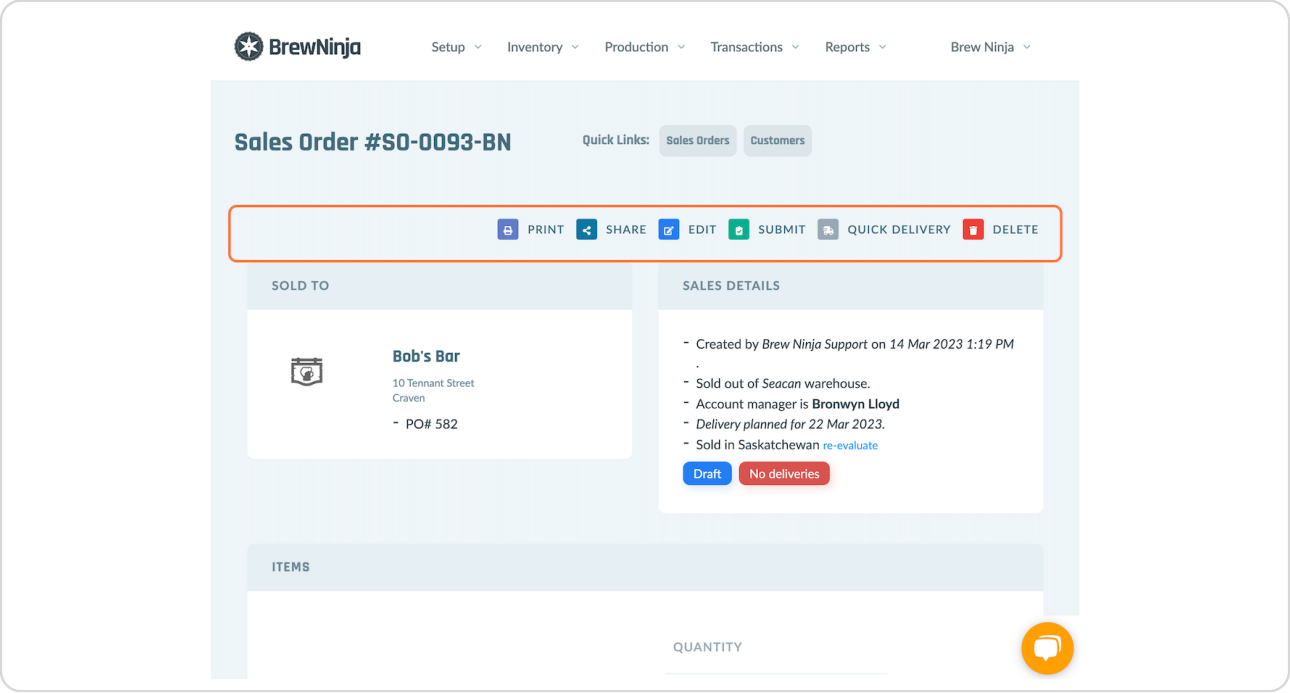
Print: Allows you to print the sales order

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.

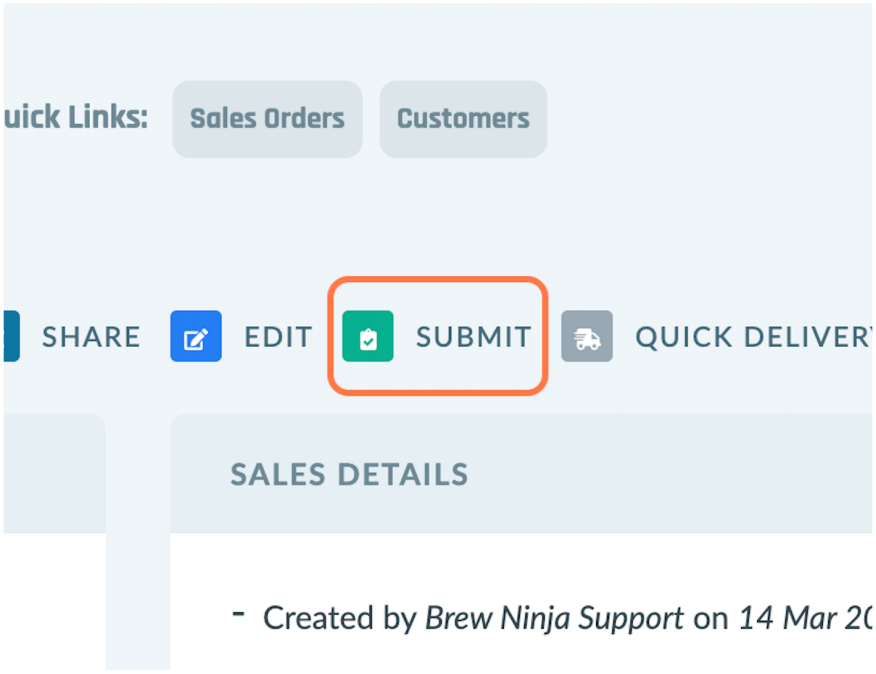


STEP 26

Click on SUBMIT

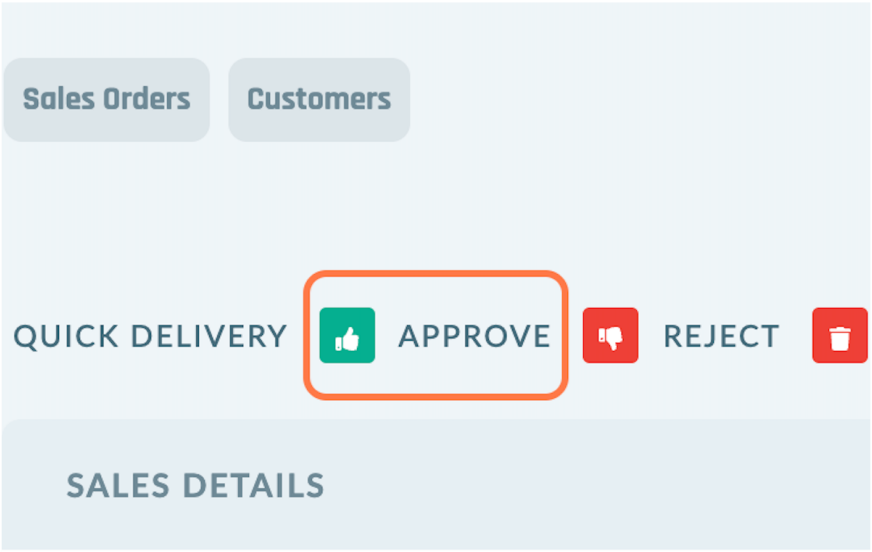
The sales order is submitted for approval at this point.

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.



- Created by *Brew Ninja Support* on *14 Mar 2023 1:1*

STEP 28

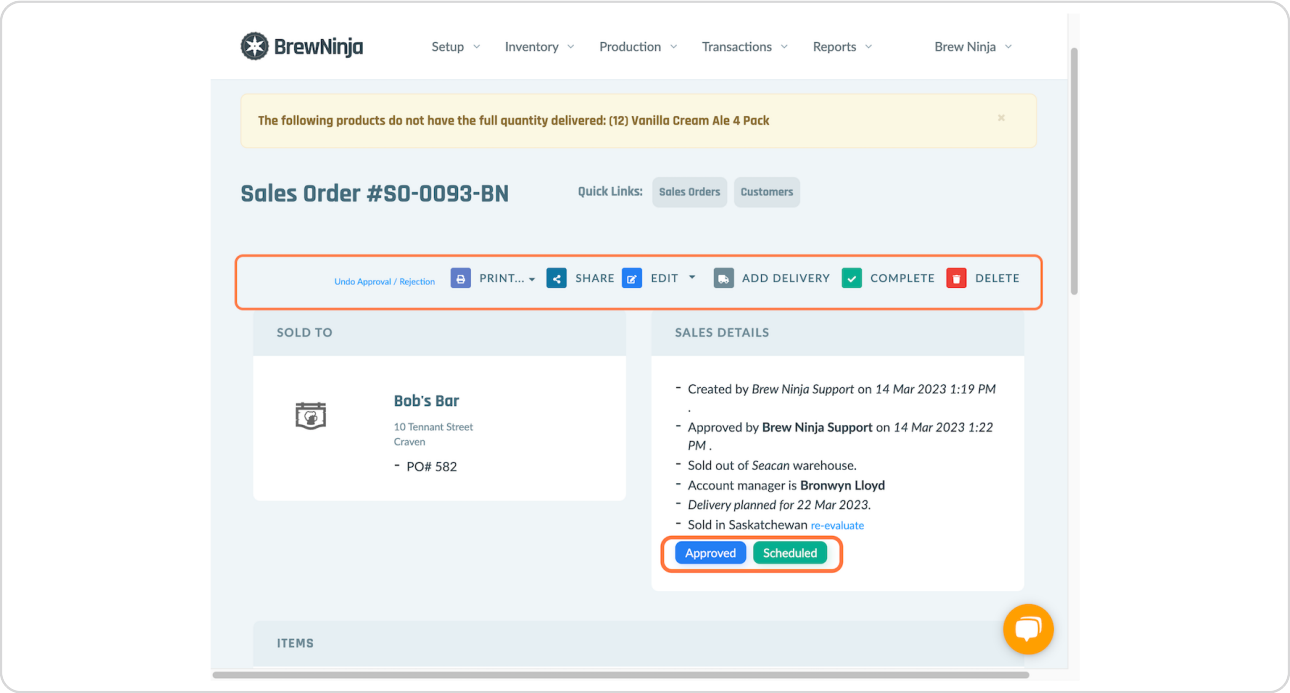
The sales order has now been approved and a delivery has been scheduled.

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'



BrewNinja