

Direct Order

July 29, 2026

Direct Order

Applications > Add new > Sales Jobs

ams

Shotec S.A.E

+

🕒

🔔

👤

🏠

AD

Sales Jobs > Orders > Job No.: New

Save

Save and Close

×

Order

Delivered

Status
Select...

Branch
Shotec S.A.E

Salesperson Responsible
Select...

Product Type
Select...

Job Title

End User
Select...

File Number

Client:
Select...

Vendor:
Select...

Order / Draft

Client
Select...

Vendor
Select...

Client Order No.

Vendor Order No.

Order Date
28 Jul 2026

Order Activation Date
28 Jul 2026

Delivery Time
Select...

Forecasted Delivery Date

Shipping Address
Select...

Delivery Term
Select...

Payment Method
Select...

Payment Period
Select...

☒ Partial Delivery

L/C Number

External order no.

☐

Item Description

Unit

Qty

Unit Price

Discount (%)

Item Price

Currency

1

Pieces

1.00

0.00

0.00%

0.00

EUR

Count: 1 + Item

Total Price
0.00 EUR

Backlog
0.00 EUR

Tickets

Direct order — Add new > Sales Jobs > Direct Order

Overview

Use Direct Order to create and retain an order directly from the Sales Jobs area, without a preceding quotation process. Sales representatives can use it to record direct commercial work, while project, purchasing, warehouse, and finance users can consult the saved order when it is relevant to their job activities.

A Direct Order opens in the **Client : Vendor : Order / Draft** stage. The available screen controls support selecting an available item, attaching files, saving the record, closing the screen, or deleting an unwanted draft.

Workflow

1. Open **Add new > Sales Jobs > Direct Order**.

The Direct Order screen opens on the **Client : Vendor : Order / Draft** tab. Review the draft before saving it. The screen can display order-related values such as quantities, amounts, percentages, and currency values.

The screenshot shows the 'ams' interface for a 'Direct Order' in 'Draft' status. A red banner at the top lists validation issues: 'Product type is required', 'Client is required', 'Vendor and client is the same. It is not possible.', 'Job title is required', and 'Vendor is required'. The form includes fields for Branch (Shotec S.A.E), Salesperson Responsible (Ramy Othman), Product Type (dropdown with error), Job Title (dropdown with error), End User (dropdown), and File Number. Below these are tabs for Client and Vendor, with 'Order / Draft' selected. The Client and Vendor sections each have a 'Select...' dropdown with an error icon. Further down are fields for Client Order No., Vendor Order No., Order Date (28 Jul 2026), Order Activation Date (28 Jul 2026), Delivery Time, Forecasted Delivery Date, Shipping Address, Delivery Term, Payment Method, and Payment Period. There are also checkboxes for 'Partial Delivery', 'L/C Number', and 'External order no.'. At the bottom is a table with columns: Item Description, Unit, Qty, Unit Price, Discount (%), Item Price, and Currency. A '+ Item' button is in the bottom left. In the bottom right, summary values are shown: Total Price: 0.00 EUR, Backlog: 0.00 EUR, and Equivalent Booking: Tickets.

Direct order — Add new > Sales Jobs > Direct Order

2. Decide whether to select an available item for the Direct Order.

- To make a selection, use **Select...**, then choose **Select**.
- Confirm the selection with **Ok**.
- If you do not want to apply the selection, choose **Cancel** instead.

Use **Cancel** only before confirming the selection. After choosing **Ok**, review the draft carefully before saving it.

Note: The available screen does not show a separate approval, confirmation, or invoicing action. Saving retains the Direct Order as a draft record; do not assume that a saved record has progressed to another business state.

3. Decide whether supporting documents are required.

- To add files to the Direct Order, select **Attach** and add the required item to **files[]**.
- Save the draft after attaching the file.

Supporting files can be used to keep order-related documentation with the Direct Order record.

4. Decide how to retain the draft.

- Select **Save** to retain the Direct Order and continue working on the same screen.
- Select **Save and Close** to retain the Direct Order and close the screen.
- Select **Cancel** if you need to leave the current selection action without confirming it.

Use **Save** when you still need to review the selected information or add attachments. Use **Save and Close** when the draft is complete for your current work.

Tip: Save before moving to another application area, such as Purchasing, Warehouse, or Finance, so that the Direct Order is retained in its current draft form.

5. Decide whether the draft should be removed.

If the Direct Order was created in error and should not be kept, select **Delete**. Use this action only after confirming that the draft is not needed.

Warning: **Delete** removes the Direct Order record. Do not use it merely to abandon an incomplete selection; use **Cancel** during the selection action instead.

Client : Vendor : Order / Draft

This tab contains Direct Order records in the draft stage. Use it to work with the current order selection, review the displayed order values, attach supporting files, and save the record. The screen may show order-related figures, including quantity, amount, percentage, and currency information.

No separate on-screen control is provided in the available screen data to move a record out of **Client : Vendor : Order / Draft**. The available actions allow you to retain

the draft with **Save** or **Save and Close**, or remove it with **Delete**.

Examples

A sales representative receives a customer request that must be recorded as a Direct Order rather than processed through a quotation.

1. The representative opens **Add new > Sales Jobs > Direct Order**.
2. On the **Client : Vendor : Order / Draft** tab, the representative uses **Select...** and then **Select** to choose the available item needed for the order.
3. The representative chooses **Ok** to confirm the selection.
4. The customer request document is added by selecting **Attach** and placing the file in **files[]**.
5. The representative reviews the displayed order values and selects **Save** to keep the draft open for a final check.
6. When no further work is required, the representative selects **Save and Close**.

The Direct Order is retained as a draft record with its selected information and attached supporting file. If the representative discovers that the record was created for the wrong request before it is needed, the representative can return to the record and use **Delete**.

Tips

Tip: Use **Save** when you expect to continue reviewing the draft on the Direct Order screen. Use **Save and Close** when your current work is complete.

Note: Keep relevant order documents in **files[]** by using **Attach**. This helps users reviewing the same Direct Order identify its supporting material.

Warning: Do not use **Delete** as a substitute for cancelling an unconfirmed selection. Use **Cancel** before selecting **Ok**.

Troubleshooting

Symptom	Likely cause	Fix
The intended selection is not applied to the Direct Order.	The selection was not confirmed.	Use Select... , choose Select , and then select Ok .
The Direct Order is not retained after leaving the screen.	The draft was not saved.	Select Save to remain on the screen, or Save and Close to save and exit.
An attachment is not available with the draft.	The file was not added to files[] .	Select Attach , add the required file, and save the Direct Order.
The record should not have been created.	The Direct Order is an unwanted draft.	Review the record and select Delete only if it should be removed.

Related pages

- [Process](#)
- [Add new — Overview](#)
- [Add new — Learning Path](#)
- [Contact](#)
- **Call**
- [Task](#)
- **Payment**