Direct Order

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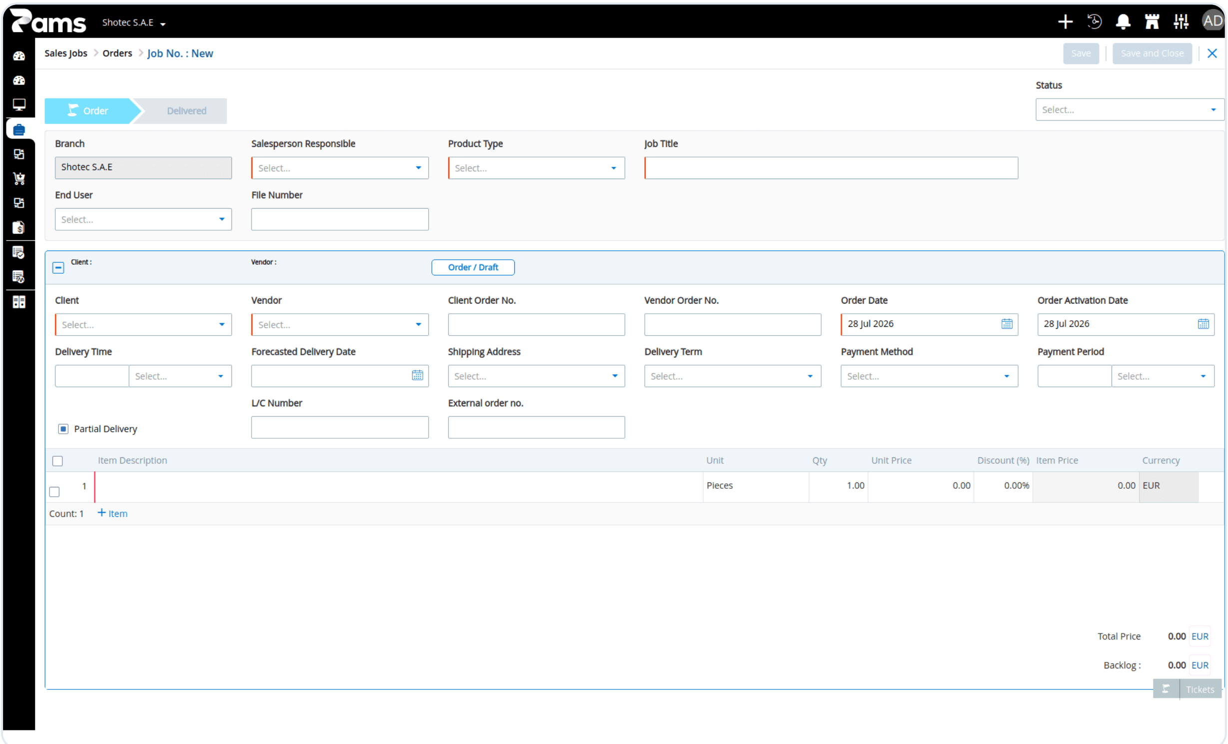
Direct Order

Applications › Add new › Sales Jobs



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Overview

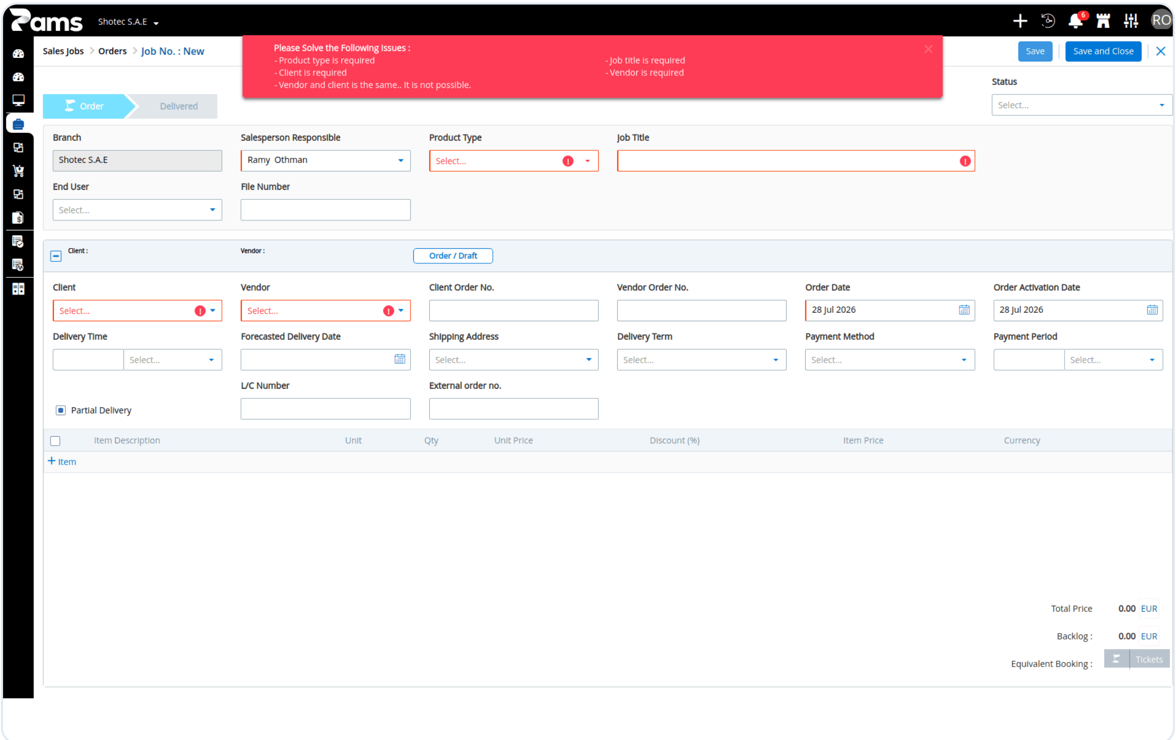
Use Direct Order to create and retain an order directly from the Sales Jobs area, without a preceding quotation process. Sales representatives can use it to record direct commercial work, while project, purchasing, warehouse, and finance users can consult the saved order when it is relevant to their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

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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.

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