

Add new — Learning Path

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Learning Paths > Add new

This learning path is for sales and purchasing users who need to create, retain, and clean up direct orders in the Add new app. You will learn how to choose the appropriate sales or purchase starting point, create a direct order as an order or draft, save supporting attachments, and safely delete an order that is no longer needed.

Learning objectives

- By the end of this path you can identify whether a sales or purchase direct order is the appropriate record to create.
- By the end of this path you can create a direct order by selecting the required context and completing Client, Vendor, and Order / Draft.
- By the end of this path you can retain a direct order using Save or Save and Close.
- By the end of this path you can attach supporting material to a direct order.
- By the end of this path you can delete an unneeded direct order or cancel the deletion safely.

Prerequisites

- Access to the **Add new** area and its **Sales Jobs** and **Purchase Job** options.
- Permission to create, save, attach to, and delete direct orders.
- Familiarity with deciding whether work is sales-related or purchase-related.

Module 1: Choose the right starting record

Goal: Distinguish sales and purchasing work so that you begin with the right type of record.

Lesson 1.1: Identify a sales opportunity before creating an order

When you are working with a potential sales opportunity, first determine whether you need an early sales record or a direct order. Review [Inquiry](#) when the work begins as a sales process, and review **Leads** when you are capturing a potential sales opportunity. Use **Direct order** when you are ready to create the sales direct order itself.

Practice task: Open [Inquiry](#), **Leads**, and **Direct order**, then identify which screen you would use for a sales direct order.

Lesson 1.2: Separate sales direct orders from purchase direct orders

When the work is purchasing rather than selling, do not use the sales direct-order screen. Review [RFQ](#) for purchase quotation work, then use the purchase [Direct order](#) when you need to add a purchase direct order. Use the sales **Direct order** only for the sales-job scenario.

Practice task: Open both **Direct order** and [Direct order](#), and choose the one you would use for a purchase direct order.

Module 2: Create and retain a sales direct order

Goal: Create a usable direct order, decide whether it is an order or draft, and retain it correctly.

Lesson 2.1: Create a direct order with the required parties

When you need to record a new sales direct order, open **Direct order**. Use **Select...** to choose the required context and confirm with **Ok**. Complete **Client** and **Vendor**, then set **Order / Draft** according to whether the record is ready to be treated as an order or should remain a draft. Select **Save** to retain the record while continuing to work.

Practice task: In **Direct order**, use **Select...** and **Ok**, complete **Client** and **Vendor**, choose an **Order / Draft** status, and select **Save**.

Lesson 2.2: Finish a direct order without losing the record

When all required order information has been entered and you are done working in the record, use **Direct order** to retain the work and exit efficiently. Verify the **Client**, **Vendor**, and **Order / Draft** choice, then select **Save and Close**. This saves the direct order and closes the record in one action.

Practice task: Create or open a direct order in **Direct order**, review **Client**, **Vendor**, and **Order / Draft**, then select **Save and Close**.

Module 3: Maintain order evidence and remove mistakes

Goal: Keep supporting material with valid orders and safely remove orders that should not remain.

Lesson 3.1: Attach supporting material to a retained direct order

When an order needs supporting material, keep it with the direct order rather than leaving it separate from the record. In **Direct order**, open the order you are working on, select **Attach**, and then select **Save** or **Save and Close** to retain the updated order.

Practice task: In **Direct order**, select **Attach** for a direct order, then use **Save** or **Save and Close**.

Lesson 3.2: Delete an unneeded direct order safely

When a direct order was created in error or is no longer needed, open it in **Direct order** and select **Delete**. At the confirmation step, select **Ok** only when you intend to remove the record. Select **Cancel** when you need to stop the deletion and keep the direct order.

Practice task: In **Direct order**, initiate **Delete** and use **Cancel** to demonstrate that you can stop an unintended deletion.

Final assessment

1. You have a potential sales opportunity, but you are not yet ready to create a sales direct order. Which screen should you review to capture the potential opportunity?
2. You need to add a purchase direct order. Which Direct order screen should you use?
3. You are creating a sales direct order and need to complete the required parties before retaining it. Which controls do you use after confirming the selection context?
4. You have finished entering a valid direct order and want to save it and exit the record in one step. Which control should you select?
5. You selected **Delete** on a direct order but realize it should remain in the system. What should you select at the confirmation step?

Answers

1. **Leads** — it is the screen for adding a potential sales opportunity.
2. **Direct order** — this is the Direct order screen under Purchase Job.
3. Complete **Client** and **Vendor**, set **Order / Draft**, then use **Save** — these controls create and retain the direct-order work.
4. **Save and Close** — it retains the direct order and closes the record.
5. **Cancel** — it stops the deletion so the direct order is kept.