SHERKETY BYTES ALIGN

Sales Order to Invoice Workflow

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Overview

In Sherkety ERP & Website Platform, this workflow starts after a quotation has already been accepted and turned into a **Sales Order**. From there, the sales team, delivery team, and accounting team work across the **Sales**, **Inventory**, and **Accounting** areas to decide when billing should happen and create the customer invoice.

The final outcome is a posted customer invoice that matches the approved order, reflects the correct billing basis such as ordered items, delivered items, or a down payment, and can then move into payment follow-up. If you need the earlier stages that lead to a confirmed order, see Opportunity to Quotation Workflow.

Trigger: [What starts this process]

This workflow begins when a quotation is no longer just a draft and becomes a confirmed **Sales Order**. In practical terms, the trigger is the user action that confirms the customer's quote on the **Sales Order** screen. Once the order is confirmed, Sherkety ERP & Website Platform treats it as an approved commercial commitment and makes it available for fulfillment and billing.

What happens next depends on how your team bills customers:

- If your company invoices immediately, the sales team may create an invoice from the **Sales Order** as soon as the order is confirmed.
- If your company invoices after fulfillment, the process continues through the delivery flow first, and the invoice is created only after quantities are delivered.
- If your company collects an advance, the billing step starts with a **down payment invoice** from the same order.

The key point is that the **Sales Order** is the handoff point between selling and billing. Before that, the document is still part of the quoting process. After confirmation, users can move into delivery preparation, invoice creation, and invoice tracking.

[SCREENSHOT: Confirmed Sales Order showing action buttons for delivery and invoice creation]

If you are not yet at the confirmed order stage, go back to Opportunity to Quotation Workflow, which explains how leads and opportunities become approved quotations.

Step-by-Step Process

1. **Open the confirmed Sales Order**
   In Sherkety ERP & Website Platform, go to the **Sales Order** that has already been approved by the customer. Check that the order is confirmed, review the customer details, and verify the products, quantities, prices, taxes, and payment terms shown on the order before billing begins.

2. **Decide the billing trigger**
   On the order, your team decides whether to invoice:

   - based on the ordered quantities,
   - based on delivered quantities,
   - or as a **down payment**.
     This choice affects whether the next step happens immediately in **Sales** or only after work is completed in **Inventory**.

3. **If billing is immediate, create the invoice from the Sales Order**
   Use the invoice creation action on the **Sales Order** screen. Choose the appropriate billing option, confirm the selection, and let Sherkety ERP & Website Platform generate the draft customer invoice. Review the draft carefully before posting it.

4. **If billing depends on delivery, complete the delivery first**
   From the confirmed order, open the related delivery document in the **Inventory** area. Validate the quantities actually shipped or completed. Once the delivery is marked as done, return to the **Sales Order** and create the invoice so the billed quantities match what was delivered.

5. **If billing starts with a down payment, create the advance invoice**
   On the **Sales Order**, choose the option for a **down payment invoice**. Enter the required amount or percentage if prompted, then create the invoice. This produces an invoice before the full order is billed.

6. **Review the invoice in Accounting**
   Open the generated customer invoice in the **Accounting** area. Confirm the customer, invoice lines, taxes, totals, and any references carried over from the order. If everything is correct, post the invoice so it becomes an official accounting document.

7. **Track invoice status**
   After posting, monitor the invoice status from the invoice screen and from the related **Sales Order**. Teams can confirm whether the invoice is still in draft, posted, or paid, and whether any remaining amount still needs to be billed.

[SCREENSHOT: Sales Order linked to delivery and customer invoice]
[SCREENSHOT: Customer invoice review screen before posting]

Roles and Responsibilities

The sales-order-to-invoice flow usually crosses several teams. In Sherkety ERP & Website Platform, each team should handle a clear part of the process so billing is accurate and timely.

Workflow step	Main role	What this role does
Confirm the quotation as a **Sales Order**	**Sales team**	Reviews the approved quote, confirms the order, and checks customer-facing details such as products, pricing, and payment terms.
Decide whether to bill now, after delivery, or by down payment	**Sales team** with **finance guidance**	Chooses the correct billing approach based on the agreement with the customer and company policy.
Process delivery when invoicing depends on fulfillment	**Warehouse or operations team**	Opens the related delivery record, confirms shipped or completed quantities, and marks the delivery as done.
Create the draft customer invoice from the order	**Sales team** or **billing team**	Uses the invoice action on the **Sales Order** and selects the correct invoice type.
Review invoice details	**Accounting team**	Checks invoice lines, taxes, totals, customer information, and references before posting.
Post the invoice	**Accounting team**	Finalizes the invoice so it becomes an official receivable document.
Follow invoice status and payment progress	**Accounting team** with **sales visibility**	Tracks whether the invoice is posted, unpaid, partially paid, or fully paid, and follows up if needed.

A simple working rule helps avoid confusion:

- **Sales** owns the commercial agreement.
- **Operations** owns the proof of delivery or completion.
- **Accounting** owns the final billing document.

If one team changes order quantities, delivered quantities, or billing timing without informing the others, invoice errors are much more likely. For related admin access and role visibility, see Managing Users and Role Based Access and Understanding Role Visibility and Access Restrictions.

What Can Go Wrong

Several issues can interrupt this workflow between the **Sales Order**, delivery, and invoice screens. Most problems come from timing, incomplete fulfillment, or missing review before posting.

- **The invoice action is used too early**
  If your company invoices delivered quantities, creating the invoice before the delivery is completed can lead to missing or incorrect billed quantities. Open the related delivery first, validate the actual quantities, then return to the **Sales Order** and create the invoice again if needed.

- **The wrong billing option is selected**
  A user may choose a full invoice instead of a **down payment invoice**, or invoice ordered quantities when the customer should only be billed for delivered items. Before confirming the invoice creation window, double-check which billing option is selected.

- **Delivery quantities do not match customer expectations**
  If the warehouse validates fewer items than the customer expected, the invoice may look incomplete. Review the delivery document and the **Sales Order** together so sales and operations agree on what was actually fulfilled.

- **The invoice stays in draft**
  Creating an invoice is not the same as finalizing it. If the invoice remains in draft, accounting still needs to review and post it. Open the invoice in **Accounting** and check whether it has been posted.

- **Users cannot access the billing step**
  Some users may be able to view the order but not create or post invoices. In that case, ask an administrator to review role access in the admin area. See Understanding Admin Page Access and Protected Navigation.

- **Loading or error messages appear while opening related records**
  If a linked order, delivery, or invoice does not load properly, refresh the page and reopen the record. If the message remains, compare what is visible on the order and invoice links and use the guidance in Understanding Loading Placeholders

Empty States and Errors and Responding to Missing Content and Retry Messages.

[SCREENSHOT: Draft invoice status compared with posted invoice status]

Tips & Best Practices

- **Review the Sales Order before creating any invoice**
  Check customer name, product lines, quantities, prices, taxes, and payment terms on the **Sales Order** screen. Small order mistakes become accounting mistakes once the invoice is posted.
- **Match your invoice timing to the customer agreement**
  Use immediate invoicing only when the customer should be billed right away. Use delivery-based invoicing when billing must reflect actual fulfillment. Use a **down payment invoice** only when an advance has been agreed.
- **Use the linked documents on the order**
  Move between the **Sales Order**, delivery record, and customer invoice using the related document links instead of searching manually. This reduces the chance of opening the wrong record.
- **Do not leave invoices in draft longer than necessary**
  A draft invoice is still under review and may not appear in accounting follow-up the same way as a posted invoice. Once accounting has checked the details, post it promptly.
- **Coordinate changes across teams**
  If sales updates quantities or pricing after confirmation, tell operations and accounting immediately. If operations delivers less than expected, tell sales before the invoice is sent.
- **Use status indicators as your checkpoint**
  Before moving to the next step, confirm the visible status on each screen:
  - **Sales Order** is confirmed
  - delivery is completed if required
  - customer invoice is created
  - invoice is posted
- **Watch for on-screen notifications**
  Sherkety ERP & Website Platform uses message banners and toast notifications

to confirm actions or show problems. If you see a warning after creating or posting an invoice, read it before leaving the page. Helpful guidance is available in Understanding Toast Messages and Action Feedback and Recognizing Warnings Errors and Dismissible Notices.

Related Workflows

This workflow sits after the quotation stage and before payment collection or broader accounting follow-up. Use these related guides when you need the earlier context:

- Lead to Invoice: The Full Customer Journey
  Use this when you want the complete path from first sales interest through invoicing.
- Opportunity to Quotation Workflow
  Use this when you need to understand how a sales opportunity becomes a customer-approved quotation and then a confirmed order.

You may also find these supporting guides useful while working through billing handoffs:

- Understanding Quotations Automation and Follow Up
- Reviewing Sales Reporting and Pricing
- Understanding Stock Movements and Warehouse Operations
- Understanding Accounting Workflows and Compliance Value

If your next task is to verify whether an invoice was created correctly and appears in the right business context, continue with the accounting and reporting documents listed above.

FAQ

When does this workflow begin?
It begins when a quotation has already been accepted and confirmed as a **Sales Order**.

Can I create an invoice directly from the Sales Order?
Yes, if your billing process allows it. On the **Sales Order** screen, use the invoice creation action and choose the correct billing option.

What if we only invoice after delivery?
Open the related delivery in the **Inventory** area, validate the delivered quantities, and

then return to the **Sales Order** to create the invoice.

What is a down payment invoice?
A **down payment invoice** is an advance invoice created from the **Sales Order** before the full order is billed.

Why is my invoice not official yet?
If the invoice is still marked as draft, it has been created but not finalized. Open it in **Accounting** and post it after review.

Why does the invoice amount look lower than the sales order total?
This often happens when billing is based on delivered quantities or when only a down payment has been invoiced so far.

Who should post the invoice?
In most teams, the **Accounting** team posts the invoice after checking totals, taxes, and customer details.

Where can I see whether the invoice is linked to the order?
Open the **Sales Order** and use the related document links to open the connected invoice and delivery records.

What should I read before this if I am still working on the quote stage?
Go to Opportunity to Quotation Workflow.