

Transfer Sales Documents by Batch

[Version 1.0]

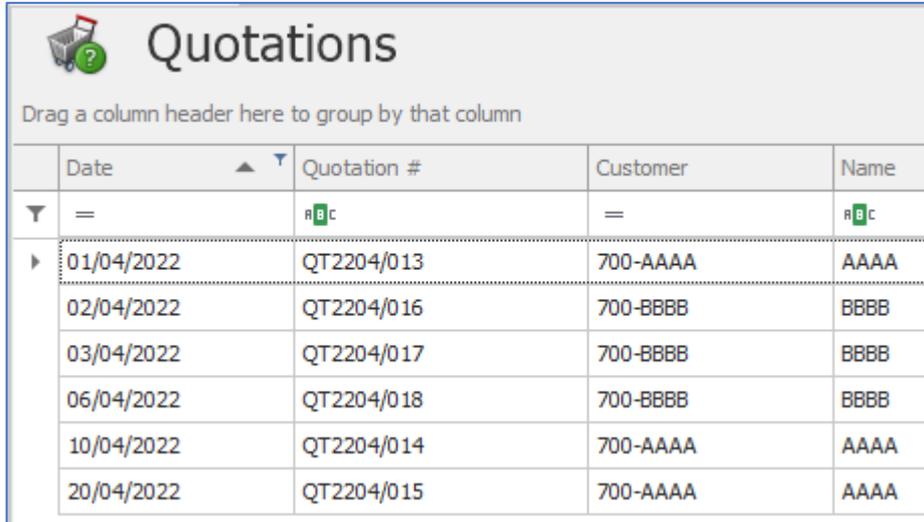
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[27 April 2022]



SCENARIO

Daily have lots of Quotation require transfer to Sales Order consuming lots of time



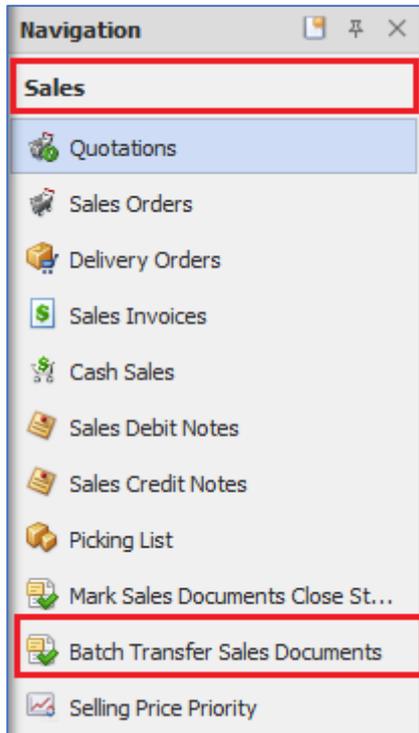
Quotations

Drag a column header here to group by that column

Date	Quotation #	Customer	Name
01/04/2022	QT2204/013	700-AAAA	AAAA
02/04/2022	QT2204/016	700-BBBB	BBBB
03/04/2022	QT2204/017	700-BBBB	BBBB
06/04/2022	QT2204/018	700-BBBB	BBBB
10/04/2022	QT2204/014	700-AAAA	AAAA
20/04/2022	QT2204/015	700-AAAA	AAAA

SOLUTION

1. Go to Sales and select "Batch Transfer Sales Documents"





2. In this form, you can filter by Document's Date, Customer, Agent, Area, Category, Customer's Control Account and Document's Project
 - 2.1. Select one of the tabs (Quotations/Sales Orders/Delivery Orders) for filter documents to be transfer.
Example: Quotations
 - 2.2. Select filtered documents to be transfer to which document type (Sales Order/Delivery Order/Sales Invoice). Example: Quotations transfer to Sales Order
 - 2.3. Doc Date is the Document's date of the new transferred documents. By default, is Current Working Date and you can reselect if require.
 - 2.4. Click "Inquiry" and system will list out outstanding document ONLY.

The screenshot shows the 'Batch Transfer Sales Documents' interface. At the top, there are filter fields for Date From (01/04/2022), Customer From, Agent From, Area From, Category From, Control A/C From, and Project From, each with a 'To' field. Below these is a tabbed interface with 'Quotations', 'Sales Orders', and 'Delivery Orders' tabs. The 'Quotations' tab is active. Below the tabs, there are fields for 'Quotation' (with a 'To' dropdown), 'Transfer To' (a dropdown menu showing 'Sales order', 'Sales order', 'Delivery order', and 'Sales invoice'), and 'Doc Date' (27/04/2022). There are also buttons for 'Revised', 'Tick All', 'Untick All', 'Inquiry', and 'Generate'. A table below these buttons has columns for 'QT #', 'Customer', 'Date', 'Customer No', 'Term', and 'Due Amount'. Red boxes and numbers 2.1 through 2.4 highlight the tabs, the 'Transfer To' dropdown, the 'Doc Date' field, and the 'Inquiry' button respectively.



- 2.5. Tick which documents require to transfer
- 2.6. Click "Generate" to proceed the transfer

Batch Transfer Sales Documents

Filters

Date From: 01/04/2022 To: 27/04/2022

Customer From: To:

Agent From: To:

Area From: To:

Category From: To:

Control A/C From: To:

Project From: To:

Quotations Sales Orders Delivery Orders

Quotation: To: **2.6** Transfer To: Sales order Doc Date: 27/04/2022

Revised Tick All Untick All Inquiry **2.5** Generate View Variants

	2.5	QT #	Customer	Date	Customer Name	Agent	Term	Due Amount
	<input checked="" type="checkbox"/>	QT2204/013	700-AAAA	01/04/2022	AAAA		C.O.D.	753.50
	<input checked="" type="checkbox"/>	QT2204/016	700-BBBB	02/04/2022	BBBB		C.O.D.	616.00
	<input checked="" type="checkbox"/>	QT2204/017	700-BBBB	03/04/2022	BBBB		C.O.D.	924.00
	<input checked="" type="checkbox"/>	QT2204/018	700-BBBB	06/04/2022	BBBB		C.O.D.	1,232.00
	<input checked="" type="checkbox"/>	QT2204/014	700-AAAA	10/04/2022	AAAA		C.O.D.	7,535.00
	<input checked="" type="checkbox"/>	QT2204/015	700-AAAA	20/04/2022	AAAA		C.O.D.	15,070.00

2.7. System will transfer each Quotations to individual Sales Order (1 Quotation to 1 Sales Order).

Example: QT2204/016 to SO2204/007 ; QT2204/017 to SO2204/008

- 3. The sequence of Quotation list transferring to Sales Order and assign new Sales Order's code are based on Document's Date then Document Code

Quotations (Transferred)

Drag a column header here to group by that column

Date	Quotation #	Transfer To
01/04/2022	QT2204/013	SO2204/006
02/04/2022	QT2204/016	SO2204/007
03/04/2022	QT2204/017	SO2204/008
06/04/2022	QT2204/018	SO2204/009
10/04/2022	QT2204/014	SO2204/010
20/04/2022	QT2204/015	SO2204/011

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