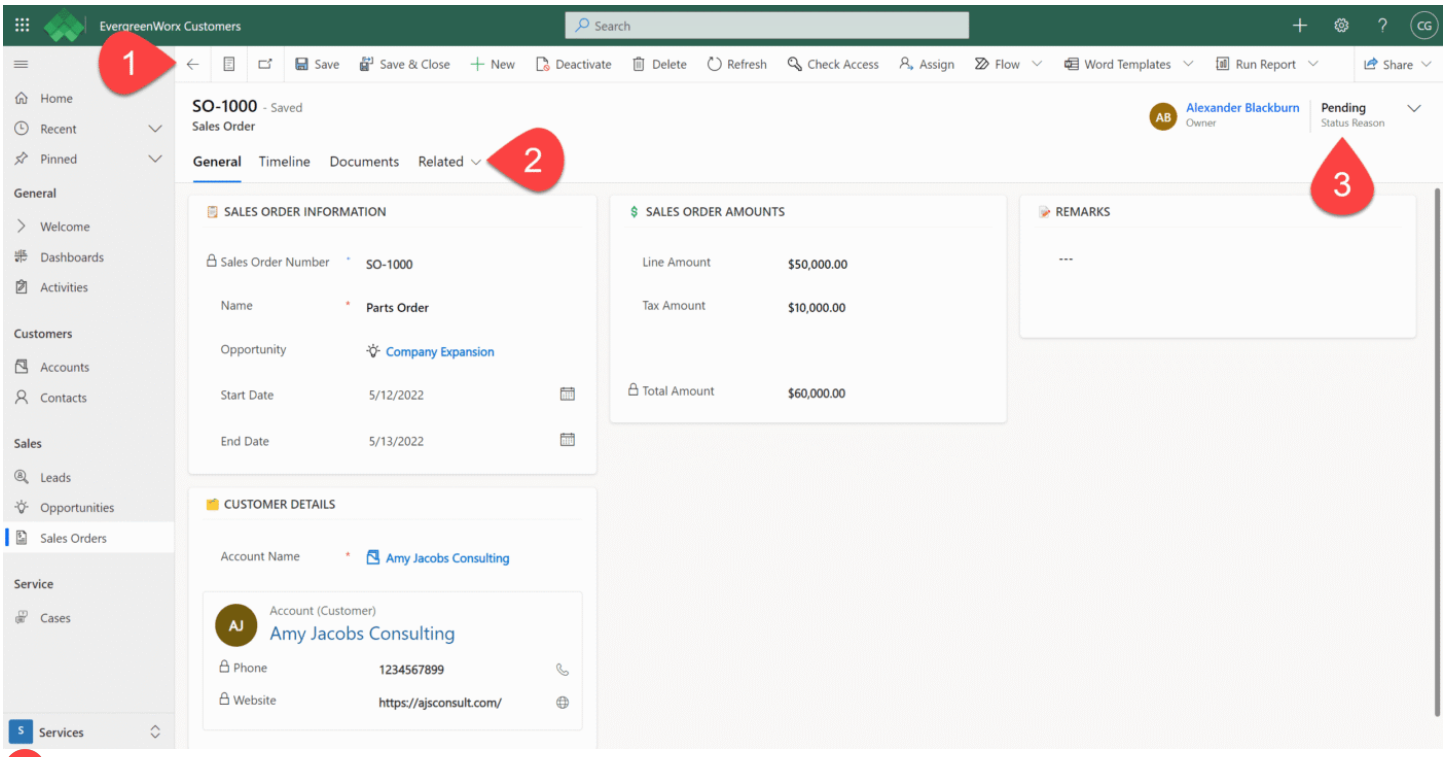
Sales Orders

Customers · https://evergreenworx.com/docs/sales-orders/

The Sales Order record form stores key information about a particular Sales Order.



1 In the ribbon, available actions are displayed for the current Sales Order record, such as deactivating the order, deleting the order, or assigning the order to another person. The actions available depend on your security role and permissions.

2 Record forms have tabs that allow the user to move between different data elements of the record. On the Sales Order record, you'll see the following tabs:

- Summary – Displays sales data such as the customer details, the amount of the order, and the start and end dates for the order.
- Timeline - Stores historical notes and activities against the record. For more information, see Timeline | EvergreenWorx.
- Document – Allows for appending files (quotes, invoices, etc.) as supporting information for the Sales Order.

- Related – Other related items, such as Record Audit History.

3 Status of the record shows the progress or completion of an active Sales Order, including New, Pending, and whether it was Submitted and/or Invoiced.