Closing a Sales Order that has a Kit

Last Modified on 06/02/2020 4:09 pm EDT

In Order Time a Sales Order cannot be Closed if it has a Kit with line items that haven't been cleared.

les order - 1.	239 EDIT	Create PDF 👻 P	int Label 👻										Status		
Seneral				Bill Address				Ship Address				Summary Revision : 1		Order Acknowledge	
No.	1239			1111 NELSON BROTHER	<.			1111 NELSON BE	POTHEPS			Subtotal		Design	
	1111 Nelson Bro	thers Change		2580 WYATT STREET FLO				SHIP 2580 WYAT	T STREET SHIP FLOOR/SU	JITE		Ship Amount		Needs Approval	i.
	6/2/2020			BILL CARE OF WEST PALM BEACH, FL 3	3404			SHIP CARE OF WEST PALM BEA	CH, FL 33021			Discount		On Credit Hold	
Promise Date Customer PO								US				FL-Palm Beach (7.00 %)		Payment Pendir	18
Contact												Total Amount		Approved Voided	
												Paid Amount		Closed	
												Balance		123.0	3
												Balance 123.6	13		
Items Deta		& Instructions		Payments Ship I	Docs De	endency	Attachments	Open Activitie	s Activity Histor	у					
Name/Number							Attachments EXT.	Open Activities	s Activity Histor MARKUP %	Y TAX CODE	CLEARED	AVAILABLE	PACK SIZE	ACTIONS	
		Y Search I	em		Scan	\$					CLEARED	AVAILABLE	PACK SIZE	ACTIONS	
Name/Number	ITEM	Search In DESCRIPTION	QUANT		UOM	¢ PRICE	EXT. 116.45	STD. COST			0	AVAILABLE	PACK SIZE		
Name/Number	ITEM MY KIT2	Search In DESCRIPTION	em QUANT 1.00		UOM	PRICE 116.45 Descriptio	EXT. 116.45	STD. COST			0 Av	_	PACK SIZE		
Name/Number	ITEM MY KIT2 Qty Per	Search In DESCRIPTION	QUANT 1.00 Item		UOM	PRICE 116.45 Descriptio	EXT. 116.45 Moulds no plus	STD. COST			0 Av 38	ailable	PACK SIZE		
Name/Number	ITEM MY KIT2 Qty Per 1.00	Search In DESCRIPTION	em QUANT 1.00 Item 100		UOM	PRICE 116.45 Descriptio Sushi Mari	EXT. 116.45 Moulds no plus	STD. COST			0 Av 38 2,4	ailable 7.00000	PACK SIZE		
Name/Number	ITEM MY KIT2 Qty Per 1.00 2.00	Search In DESCRIPTION	eem QUANT 1.00 Item 100 101		UOM	PRICE 116.45 Descriptio Sushi Mari 1/4" Trays	EXT. 116.45 Moulds no plus	STD. COST			0 Ax 38 2,4 2,4	ailable 7.00000 190.00000	PACK SIZE		
Name/Number	ITEM MY KIT2 Qty Per 1.00 2.00 1.00	Search In DESCRIPTION	em QUANT 1.00 item 100 101 105	TY FILLED	UOM	PRICE 116.45 Descriptio Sushi Mari 1/4" Trays Parts	EXT. 116.45 m Maulds na plus s - Sencorp	STD. COST			C Av 38 2,4 2,4 91	ailable 7.00000 190.00000 104.50000	PACK SIZE		

In the default Matrix view all of the Kit components can be seen, but in order to clear them we need to perform a few actions.

Start off by clicking the cog in the items tab to manipulate this List.

Click on the Columns Tab and Add the Cleared Column. Then click Save as seen below.

No. 1239 Customer 1111 Nelson Brother Date 6/2/2020 Promise Date 6/2/2020 Customer PO Contact		List Options Filters Col	Bill Address 1111 NELSON BROTH 2580 WWATT STREET P BILL CARE OF WEST PALM BEACH, R	LOOR/SUITE			Ship Address 1111 NELSON BROTHERS SHIP 2580 WYATT STREET SHIP F SHIP CARE OF WEST PALM BEACH, FL 33021 US	LOOR/SU	ITE	s	ubtotal hip Amount		116.45 0.00 -0.00
Customer 1111 Nelson Brother Date 6/2/2020 Promise Date 6/2/2020 Customer PO Contact		List Options	2580 WYATT STREET F BILL CARE OF WEST PALM BEACH, FL	LOOR/SUITE			SHIP 2580 WYATT STREET SHIP F SHIP CARE OF WEST PALM BEACH, FL 33021	LOOR/SU	ITE	s	hip Amount		0.00
Date 6/2/2020 Promise Date 6/2/2020 Customer PO Contact		List Options	BILL CARE OF WEST PALM BEACH, R				SHIP CARE OF WEST PALM BEACH, FL 33021	COOK/SU	112				
Promise Date 6/2/2020 Customer PO Contact				L 33404						D			
Contact	F												
											L-Palm Beach (7.00 %)		7.1
ns Details Memo & In		Filters Col							— ×		aid Amount		-0.0
ns Details Memo & In		Filters Col									alance		123
ms Details Memo & In		Filters Col									Balance 123.63		123
ns Details Memo & In			umns Other										
	nstruct	Available columns				Selected	columns						
		Conversion Rate			∧ Ad	Filled		^	Тор				
ame/Number	~	Customer Part No			0	UOM			x				
		Discount %			Remo	Price			Up				
NE NO. ITEM	DESCRI				0	Ext.				CLEARED	AVAILABLE	PACK SIZE	ACTION
MY KIT2	Great F	Id							-	0			80
Qty Per		Image				Std. Cos			Down	Availa	hla		
1.00		Item Type				Markup	96		Bottom	387.00			
	_	Line Instructions				Tax Cod	e		x				
2.00		Manually Cleared				Cleared				2,490.0			
1.00		Manufacturer Part	No.			Availabl	-			2,404.5	50000		
1.00		Margin %				Pack Siz	A			91.000	00		
1.00		margin is			~		-	~		-1.000	00		

Then click on the Other Tab and change the View Type from Matrix View to Line View and hit Save:

les Order -	- 1239 EDIT	Create PDF	v Print Label v							Statu	IS Order
eneral				Bill Address			Ship Address		Summary Revision :		
Custom	lo. 1239 ter 1111 Nelson Br ate 6/2/2020 ate 6/2/2020	thers Chan	18e	1111 NELSON BROTHERS 2580 WYATT STREET FLOO BILL CARE OF WEST PALM BEACH, FL 33-	DR/SUITE		1111 NELSON BROTHERS SHIP 2580 WYATT STREET SHIP FLOOR/SUITE SHIP CARE OF WEST PALM BEACH, FL 33021 US		Subtotal Ship Amount Discount FL-Palm Beach (7.00	6)	116.45 0.00 -0.00 7.18
Conta			List Options					- *	Total Amount Paid Amount Balance		123.63 -0.00 123.63
			Filters Colu	mns Other					Balance 12	23.63	
tems D		& Instruct	So	rt By Line No.			v				
LINE NO.	ITEM	DESCRI	View	Type Matrix View Matrix View			~	cu	ARED AVAILABLE	PACK SIZE	ACTIONS
1	MY KIT2	Great F		Line View			Save	Cancel			B. 0
	Qty Per		ltem		Descript	ion			Available		
	1.00		100		Sushi Ma	ri Moulds no plus			387.00000		
	2.00		101		1/4" Tray	5			2,490.00000		
	1.00		105		Parts				2,404.50000		
	1.00		110		Spare Pa	rts - Sencorp			91.00000		
	1.00		0932409-	BL	Color:Blu	e			-1.00000		

Here we can see each Line Item in the Kit and we can tell they haven't been Cleared:

es Order	- 1239 🛯 🗤 🖓	Print Label 👻											Status	Order
eneral			Bill Address				Ship /	Address			Sum	nary Revision : 1		
N	No. 1239		1111 NELSON BROTHERS				1111 N	ELSON BROTHERS			Subto	al		116.4
	ner 1111 Nelson Brot ate 6/2/2020	hers Change	2580 WYATT STREET FLOO BILL CARE OF	R/SUITE			SHIP 2: SHIP C	580 WYATT STREET: ARE OF	SHIP FLOOR/SUITE		Ship A	mount		0.00
	ate 6/2/2020 ate 6/2/2020		WEST PALM BEACH, FL 334	104				PALM BEACH, FL 330	021		Discor	int		-0.0
Customer l	PO						US					m Beach (7.00 %)		7.18
Conta	act											Amount		123.6
												mount		-0.0
											Balan	te		123.0
ems C	Details Memo a	& Instructions Custom	Payments Ship Do	cs Deper	ndency	Attachments	s Open /	Activities A	ctivity History			Balance 123.63		
		& Instructions Custom	Payments Ship Do	cs Deper		Attachments	s Open /	Activities A	ctivity History			Balance 123.63		
Name/Numb			Payments Ship Do QUANTITY			Attachments PRICE	s Open /	Activities A	ctivity History MARKUP %	TAX CODE	CLEARED	Balance 123.63 AVAILABLE	PACK SIZE	ACTION
Name/Numb	ber	Y Search Item		Scan a	2					TAX CODE Non	CLEARED		PACK SIZE	ACTION 2 C
iems C Name/Numb LINE NO. 1	ber ITEM	Search Item	QUANTITY	Scan I	₽	PRICE	EXT.	STD. COST	MARKUP %			AVAILABLE	PACK SIZE	
Name/Numb LINE NO.	ber ITEM 100	Search Item DESCRIPTION Sushi Mari Moulds no plus	QUANTITY 1.00	Scan g FILLED 0.00	UOM EA	PRICE 6.95	EXT. 6.95	STD. COST 6.00	MARKUP % 16.00 %	Non	0	AVAILABLE 387.00000	PACK SIZE	8.6
Name/Numb LINE NO. 1	ттем 100 101	Search Item DESCRIPTION Sushi Mari Moulds no plus 1/4" Treys	QUANTITY 1.00 2.00	FILLED 0.00 0.00	UOM EA EA	PRICE 6.95 1.25	EXT. 6.95 2.50	STD. COST 6.00 35.00	MARKUP % 16.00 % -96.00 %	Non Tax	0	AVAILABLE 387.00000 2,490.00000	PACK SIZE	8 C

Click on each Line Item and click on the checkbox in the Cleared Column to Clear each one individually:

Sales + Sales Orders + Sale Order									Created By lan Be	enoliel 6/2/2020 3:36 PM	Modified By Ian Benol	iel 6/2/2020 3:36 PI
Sales Order - 1239 🚥	Create PDF + Print Label +										Status Ord	er 🗸
General		Bill Address			Ship A	Address			Summa	IFY Revision : 1		
No. 1239		1111 NELSON BROTHERS				ELSON BROTHERS			Subtotal			116.45
Customer 1111 Nelson Bro Date 6/2/2020	thers Change	2580 WYATT STREET FLOOR/SU BILL CARE OF	ITE		SHIP 2 SHIP G	580 WYATT STREET SI ARE OF	HIP FLOOR/SUITE		Ship Ame			0.00
Promise Date 6/2/2020		WEST PALM BEACH, FL 33404			WEST F	ALM BEACH, FL 3302	21		Discount			-0.00
Customer PO Contact									Total Am	Beach (7.00 %)		7.18
Contact									Paid Am			-0.00
									Balance			123.63
										Balance 123.63		
Name/Number	Y Search Item		Scan 🌣									
LINE NO. ITEM	DESCRIPTION	QUANTITY	FILLED UOM	PRICE	EXT.	STD. COST	MARKUP %	TAX CODE	CLEARED	AVAILABLE	PACK SIZE	ACTIONS
1 100	Sushi Mari <u>Moulds</u> no plus .d		0.00 EA	6.95	6.95	6	16	Non		387.00000		
5 0932409-BL	Color:Blue	1.00	0.00 EA	100.00	100.00	3,950.00	-97.00 %	Tax	0	-1.00000		6.0

Once every Item has been Cleared you'll see check marks next to each one in the Cleared Column and the Status will automatically update to Closed:

es Order -	1239 TRANSFER	Create PDF 👻 Print Label	¥									Stati	US Closed
neral			Bill Address				Ship Address				Balance 12	23.63	
No	a. 1239		1111 NELSON BROTHER				1111 NELSON BRO	THERS			Summary Revision :	1	
	er 1111 Nelson Brothe e 6/2/2020	rs Change	2580 WYATT STREET FLO BILL CARE OF	DR/SUITE			SHIP 2580 WYATT : SHIP CARE OF	STREET SHIP FLOOP	VSUITE	3	iubtotal		135.3
Promise Date			WEST PALM BEACH, FL 3	404			WEST PALM BEACH	H, FL 33021		1	ihip Amount		0.00
Customer PC							05				Discount		-0.0
Contac	ct										L-Palm Beach (7.00 9	76)	8.49
											otal Amount		143.8
											aid Amount		-0.0
											Ralance		143.8
										1	Balance		143.8
ems De	etails Memo & I	Instructions Custom	Payments Ship D	ocs Depender	:y Attac	hments	Open Activities	Activity His	tory		Balance		143.8
>	etails Memo & I ITEM	Instructions Custom	Payments Ship D		cy Attac	hments PRICE	Open Activities	Activity His STD. COST	tory MARKUP %	TAX CODE	Salance	AVAILABLE	143.8 PACK SIZE
INE NO.			, ,									AVAILABLE 387.00000	
DINE NO.	ITEM	DESCRIPTION	QUANTI	Y FILLED	UOM	PRICE	EXT.	STD. COST	MARKUP %	TAX CODE	CLEARED		
LINE NO.	ITEM 100	DESCRIPTION Sushi Mari Moulds no plus	QUANTI 1.00	Y FILLED	UOM EA	PRICE	EXT. 6.95	STD. COST 6.00	MARKUP %	TAX CODE Non	CLEARED	387.00000	
	ITEM 100 101	DESCRIPTION Sushi Mari Moulds no plus 1/4" Trays	QUANTI 1.00 2.00	ry Filled 0.00 0.00	UOM EA EA	PRICE 6.95 1.40	EXT. 6.95 2.80	STD. COST 6.00 35.00	MARKUP % 16.00 % -96.00 %	TAX CODE Non Tax	CLEARED ©	387.00000 2,490.00000	

You can always swap back to the Matrix View afterwards by clicking on the cog, going to the Other Tab, selecting it and hitting Save.