Sales Order Manager User Guide

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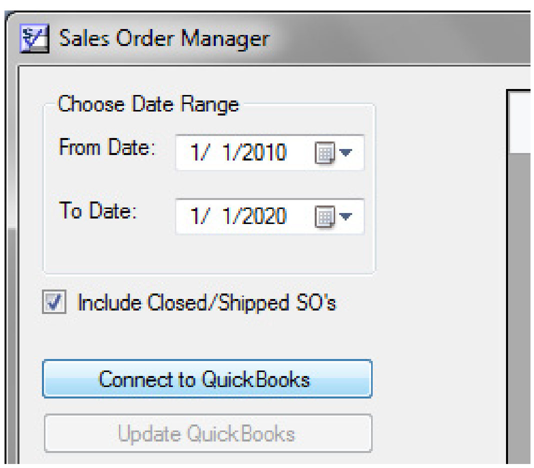
Getting Started

1. Download the SalesOrderManager.zip file and install on the same computer where QuickBooks is installed. (See Installation Instructions)

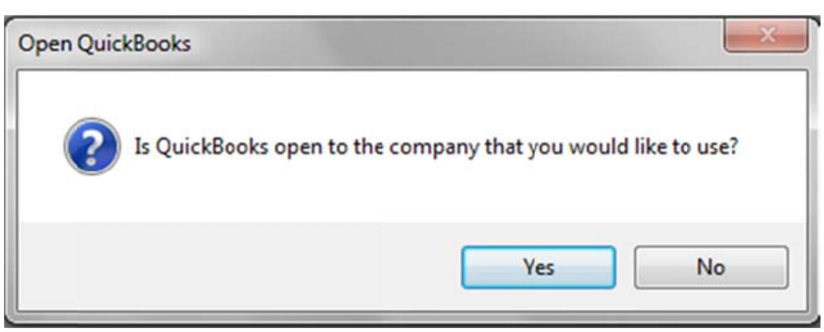
2. Open QuickBooks, and open the company file that you want to use.

3. Start the Sales Order Manager by double clicking the icon on the desktop or by going to Start- Programs- QB Utility – Sales Order Manager

4. The Sales Order Manager will open in a new window.
   a. Enter a Date Range- only Sales Orders in this Date Range will be retrieved from QuickBooks
   b. Choose to Include Closed/Shipped Purchase Orders
   c. Click “Connect to QuickBooks”

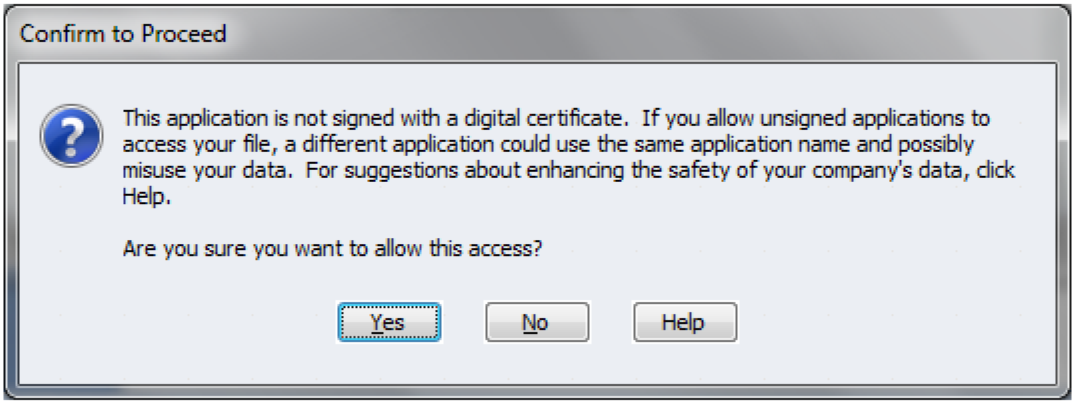


5. A window will appear asking if QB is open to the company that you would like to use. Ensure that QuickBooks is open on the company that you would like to work with, and then click “Yes”

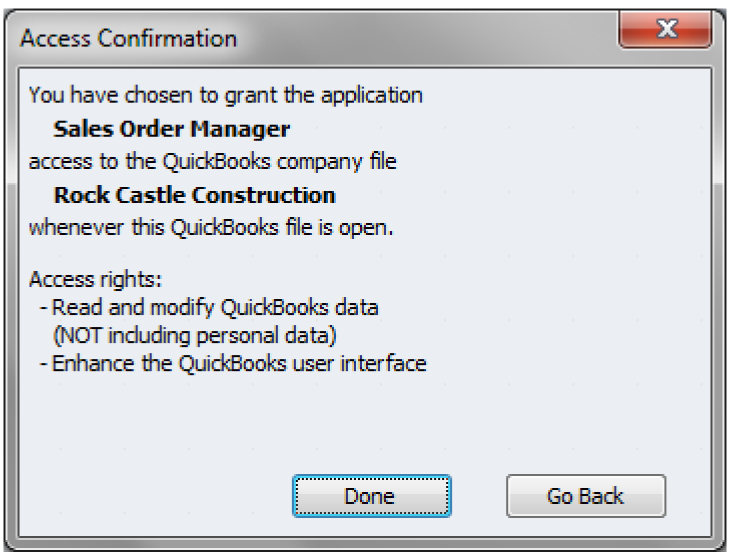


6. The first time you use the Sales Order Manager, QuickBooks will require you to grant permission to the utility to access data. Select “Yes, whenever this QuickBooks company file is open” and then click “Continue”.

7. A window will appear asking you to confirm, click "Yes".



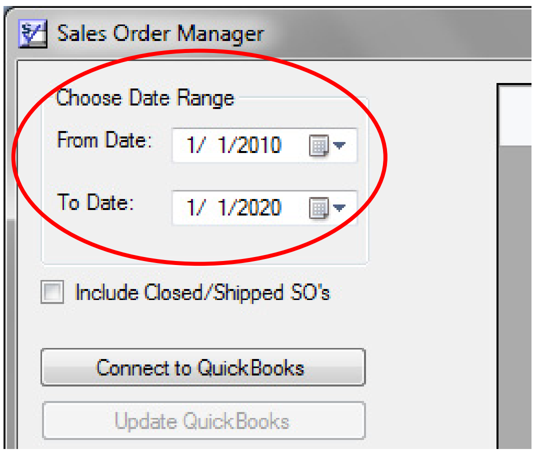
8. Access Confirmation window will appear, click "Done"



Selecting the Sales Orders to work with

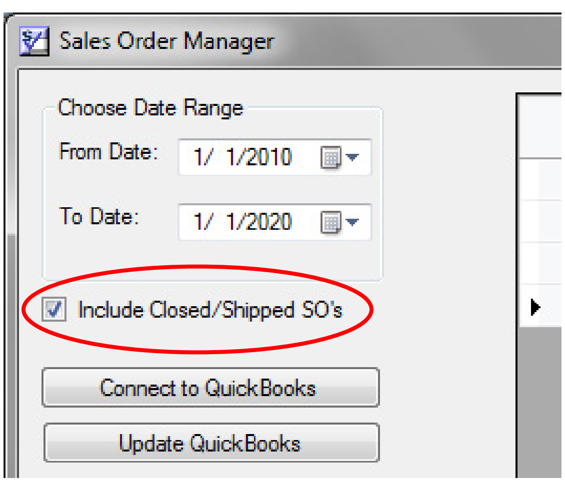
1. Entering a Date Range

Select the Date Range of the Sales Orders that you would like to work with by entering the dates in the "From Date" and "To Date" Sections



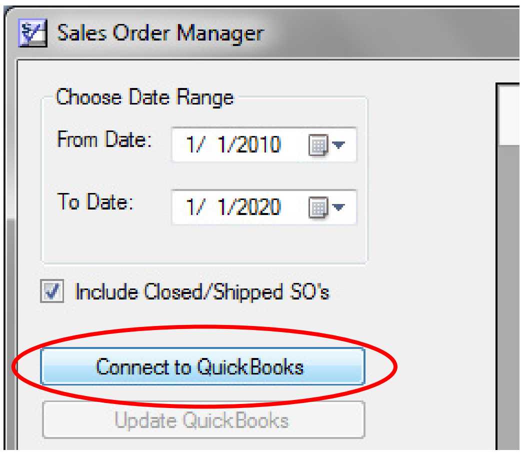
2. Include Closed and Shipped Sales Orders

If you would like to include Closed and Shipped Sales Orders as well as Open Sales Orders, check the box next to "Include Closed/Shipped SO's". If you do not want to include closed or fully shipped SO's do not check the box.

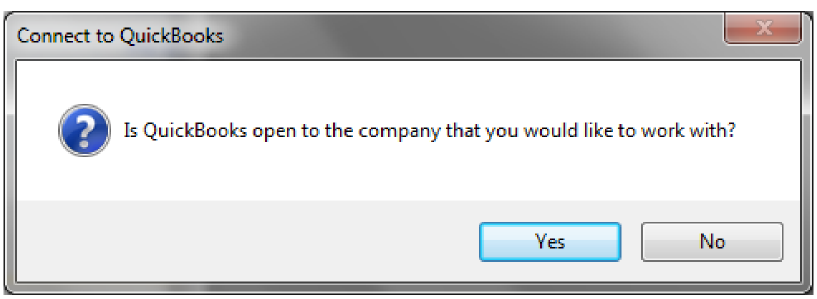


3. Connecting to QuickBooks

To load the Sales Orders that meet the parameters you have set in steps one and two, click “Connect to QuickBooks”



4. Ensure that QuickBooks is opened to the company file you would like to work with and click “Yes”

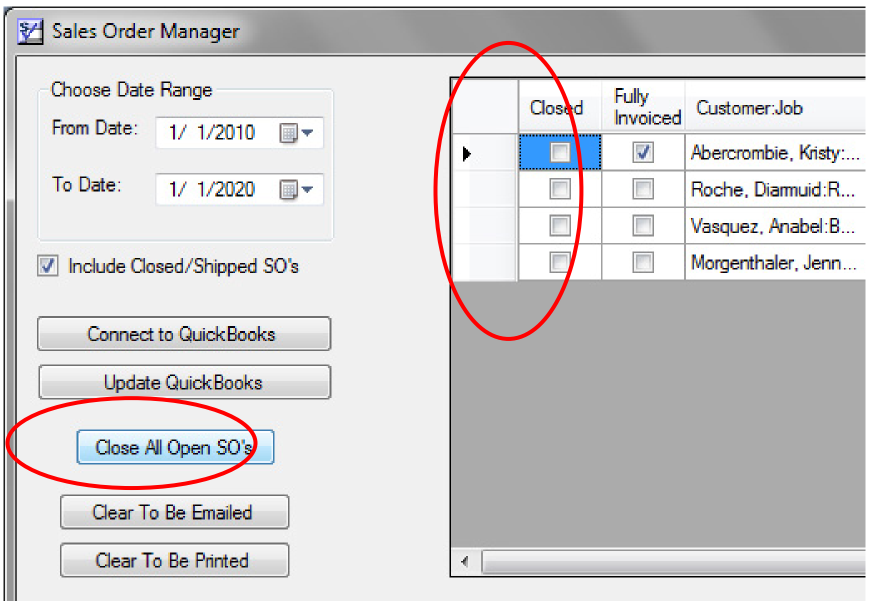


Working with Sales Orders

Close/Open Sales Orders

If you selected “Include Closed/Shipped SO’s then you will see both open, manually closed, and fully shipped SO’s in your date range.

1. Use the check boxes under the column “Closed” to close a Sales Order. To close all of the Sales Orders in the list, click the box that says “Close All Open SO’s”.

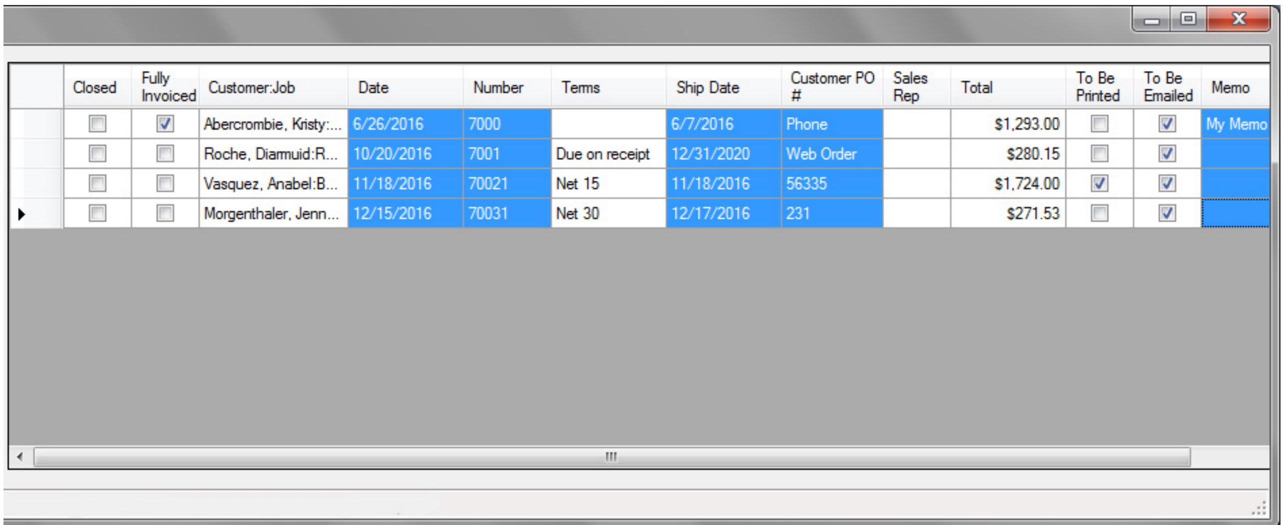


2. To open all of the Closed Sales Orders in the list, click the box that says “Open Closed SO’s”

NOTE: The button will toggle between “Close All Open SO’s” and “Open All SO’s” depending on whether the Sales Orders in your list are already closed or opened. You cannot open a SO that is fully shipped in QuickBooks.

Editing Sales Order Information

3. To edit Sales Order Information, simply click on the field that you would like to edit (Date, Number, Ship Date, Customer PO #, or Memo) and make the necessary changes.



Closed	Fully Invoiced	Customer:Job	Date	Number	Terms	Ship Date	Customer PO #	Sales Rep	Total	To Be Printed	To Be Emailed	Memo
☐	☑	Abercrombie, Kristy:...	6/26/2016	7000		6/7/2016	Phone		$1,293.00	☐	☑	My Memo
☐	☐	Roche, Diarmuid:R...	10/20/2016	7001	Due on receipt	12/31/2020	Web Order		$280.15	☐	☑	
☐	☐	Vasquez, Anabel:B...	11/18/2016	70021	Net 15	11/18/2016	56335		$1,724.00	☑	☑	
☐	☐	Morgenthaler, Jenn...	12/15/2016	70031	Net 30	12/17/2016	231		$271.53	☐	☑	

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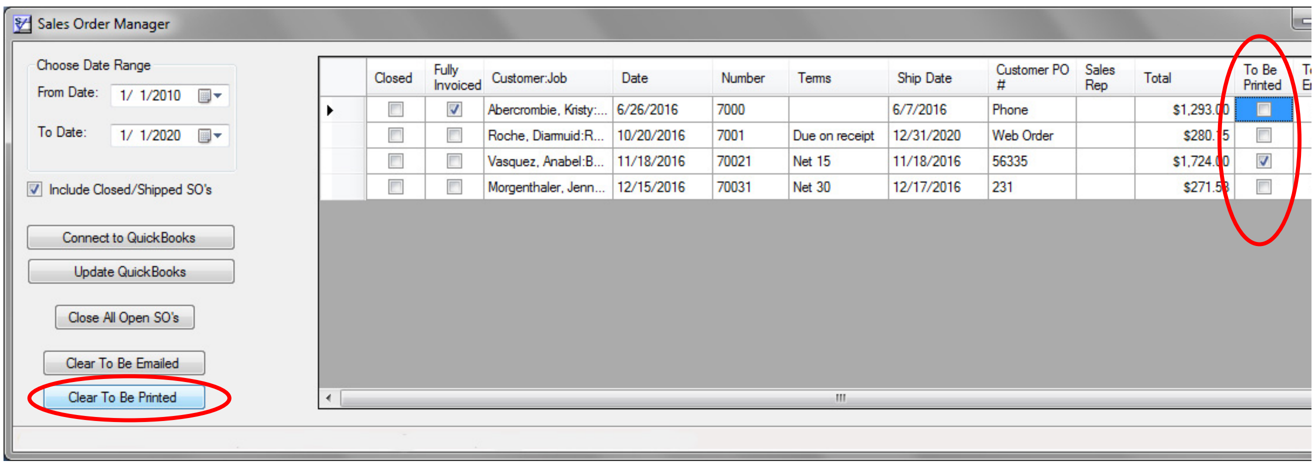
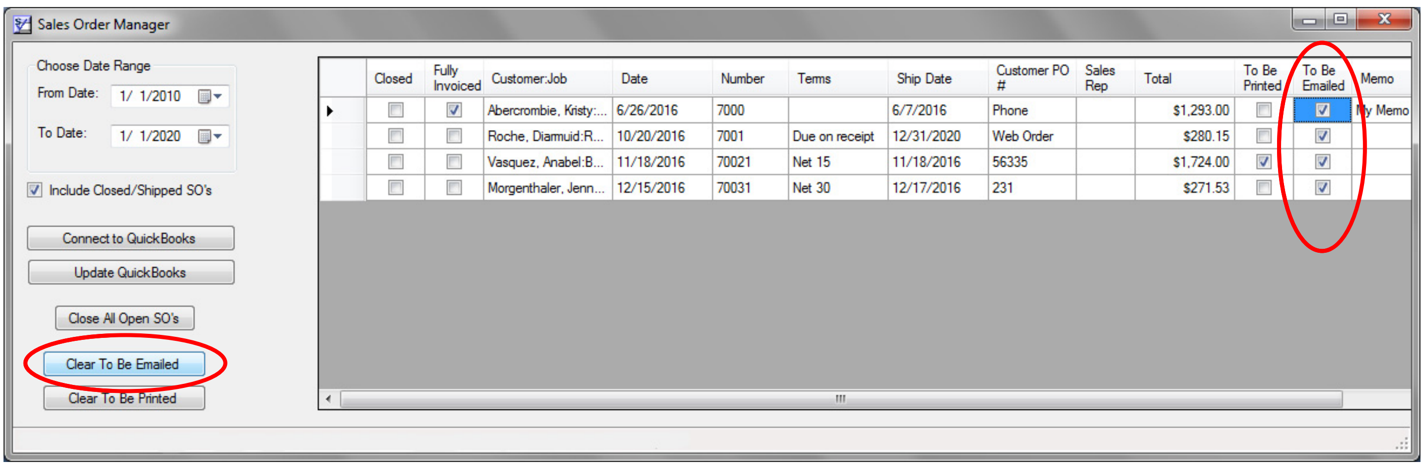
Changing “To Be Printed” Status

4. Use the check boxes in the column “To Be Printed” to select whether Sales Order should be marked for printing in QuickBooks. You can also click the box “Clear To Be Printed” to uncheck all of the boxes.



Changing "To Be Emailed" Status

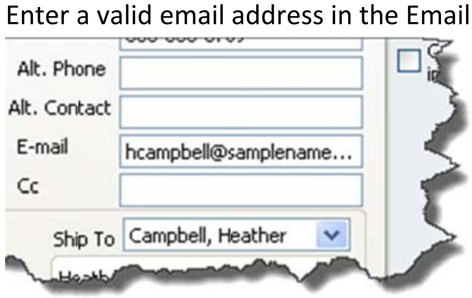
5. Use the check boxes in the column "To Be Emailed" to select whether Sales Order should be marked for emailing from QuickBooks. You can also click the box "Clear To Be Emailed" to uncheck all of the boxes.



NOTE: A Customer's email address must be on file in QuickBooks or you will not be able to use Sales Order Manger to mark a SO as To Be Emailed. Sales Orders marked To Be Emailed without a valid email address on file will be skipped when updating QuickBooks.

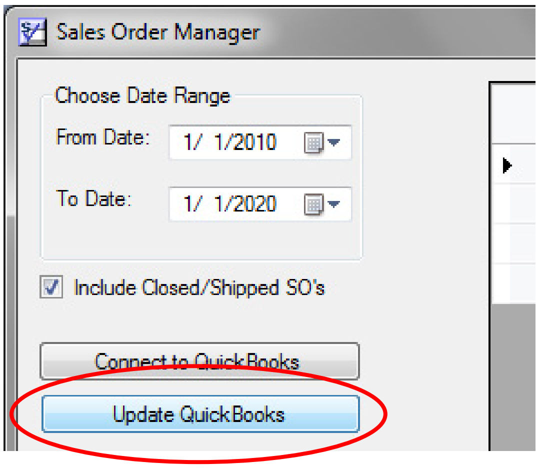
To update the Customer's email address in QuickBooks:

1. In QuickBooks click "Customers" and select Edit Customer for the customer that you would like to update.
2. Enter a valid email address in the Email field



Updating QuickBooks

1. To save your changes to QuickBooks, click “Update QuickBooks” .



NOTE: To clear any changes you have made without updating QuickBooks, Click “Connect to QuickBooks” to refresh the list of Sales Orders from QuickBooks.

For information or help with Sales Order Manager please visit our website at www.QButility.com, or email us support@qbutility.com.

Thank you for using Sales Order Manager!