Create a Sales Order

How to Create a Sales Order in Muhasib ERP

Overview

This guide will help you record a customer order with the correct items, promised quantities, terms, and status.

Muhasib creates an order for dashboard/inquiry and later delivery/invoice conversion. Whether it reserves stock or posts accounts requires confirmation.

Who can do this

You need access to Sales Order and Sales Order Add plus supporting customer/item rights.

Before you start

Create customer, items, status, payment terms, addresses, prices/taxes, and promised date; confirm stock/reservation policy.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Sales & Customers → New Sale Order.

Create a Sales Order

Step 1: Start a new Sales Order

Step 2: Select customer/contact/delivery address

Step 3: Enter order/promised dates, reference, terms, and default status

Step 4: Add item/variant/unit quantities

Step 5: Review price, discount, tax, and totals

Step 6: Save once

Check your work

Find the order in Sales Order Dashboard/Inquiry and compare customer, lines, dates, status, totals, availability, and no unintended sale/payment.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Do not recreate after timeout; check inquiry.
- Do not promise stock based solely on on-hand when reservations/forecast apply.

Related guides

- Deliver or Convert a Sales Order
- Create a Direct Delivery
- Review the Sales Order Dashboard

What to do next

> **Deliver or Convert a Sales Order**.

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