Create sales despatch advice

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To create a sales despatch advice from sales order:

- click on the document icon found in the beginning of each document row in sales orders list view or
- click on the button **Create document** in sales order view.

To create despatch advice based on master data - your product and price info - click on the button **Create document** in sales despatch advices list view.
NB! This functionality is accessible only for companies who are additionally using the products Telema Product Data Management (Telema PDM) that allows to manage products, prices and partners in Telema.

Invoice creation view will be opened.

In case you have permits to create both invoice or despatch advice based on order, then choose the correct document type from the pop-up window.

At first only the tab Start is active. Other tabs are shown, but inactive, they will be activated as you go through the invoice creation process.
All mandatory fields are marked with *.

Start

Despatch advice no* - invoice number is generated automatically. You can overwrite the given number if needed.
Despatch advice date* - by default the invoice date will be set as today's date. In case required you can change the date by entering the date in format dd.mm.yyyy or choosing the suitable date from the pop-up calendar.

Document parties info (fields Billed to, Ship to, Orderer and Supplier) will be filled automatically with the companies data found from the order. You cannot change any of the data when you are creating it based on order. But when you are creating a new despatch advice, you have to choose the Supplier and shipping destination.

Currency* - choose the right currency. By default is the currency of your own Country or the currency type mentioned already in the previous order.

References - The source document - sales order - will be referenced. The reference to order (doc number and date) from which you are creating the document will be added automatically. This will only be visible when making sales despatch advice based on order. This field will not be visible, when you are creating a new sales despatch advice without a source document.

Delivery date* - the actual date of the delivery. Enter the date in format dd.mm.yyyy or choose the suitable one from the pop-up calendar.

Delivery date requested - delivery date that was chosen from the other party (buyer). This field will only appear when making a despatch advice based on order.

In case you would like to cancel creating the despatch advice, click on the button **CANCEL** in the end of the page. You are asked to confirm your action.

Choosing **YES**, will redirect you to the despatch advices list view.
Choosing **NO**, will leave you to the despatch advice creation view and you can proceed.
After entering all the necessary data, click on the button **NEXT**. You will be directed to the next tab **Add products** if you are using PDM or to **Confirm** tab, when you do not have your own product data.

Add products

NB! This functionality is accessible only for companies who are additionally using the service Product Data Management, which allows to manage products, prices and partners in Telema web.

Here you can choose the products to add to the despatch advice if you have uploaded the products' data to Telema.

Here you can add products by:

- Searching them by symbols from the product description, GTIN or product code.
- Searching them by opening product groups

To use the first possibility, enter at least 3 symbols in the search window and click either Enter on the keyboard or the Loop icon beside the search box. To get correct results, please make sure that you have chosen the right search parameter before searching.

Search results will be shown in the table below.

To search products from product groups, click on the group of interest. In case it contains additional subgroups choose required one until you will be shown the contents of the group below as a product list.

In both cases you will be shown the products included in the assortment for this buyer's branch for the delivery date in corresponding to the currency you chose on **Start** page.

You will see the following information about the products:

GTIN
Supplier product code
Product description
Qty
Unit
Price
Comments - you can enter comments or notes per each product line.

In case you supply goods that have information about lot numbers or best before dates, click on the button +**ADD DETAILS** to enter the required data.
An additional row with the following information will be shown:

Lot number - enter a valid lot number
Serial no - enter a serial number
Valid until - enter the valid until date by picking the date from a pop-up calendar or by entering the date in the format dd.mm.yyyy. Entering Lot quantity will be mandatory.
Best before - enter the best before date. Entering Lot quantity will be mandatory.
Lot qty - enter the products' quantity that were invoiced from this certain lot.
Unit

Add as many products as necessary.

If all the products are inserted, click **NEXT**.

Then you will be directed to the last tab **Confirm**, where you can overlook all the information added to the despatch advice.

Confirm

Here you will see the final view of the despatch advice to review all the data:

Despatch advice header:

Despatch advice no*
Despatch advice date*

Billed to – detailed information about the buyer company
Supplier
Orderer''
Ship to

Currency*

References
Delivery date *****
Delivery date requested **- delivery date requested by the buyer in the order**

Comments
Created by **– information about the person who created the despatch advice: username, name, email address**

    The detailed information given in document's header is hidden by default. To see the whole data, click on the labels (Billed to, Ship to, Supplier, References, Dates, Comments, Created by).
To add any comments to the despatch advice use the field Comments. Click on the label and write the comment into the textbox.

    If you would like to change the delivery date for example, go back to tab Start, make the changes and turn back to tab Confirm.

If you are creating a despatch advice based on order, all the available product and price data is copied from order document.

    The despatched quantities are left empty, but you can easily copy them from order as well by clicking on the button **COPY ORDER QUANTITIES**.

    It is also possible to add and additional product row from blank if required, meaning that all the product details (product codes, description, etc) has be added manually. To add a product row from blank, click on the button +**ADD PRODUCT** in the end of the product rows. After that a row with blank fields will be inserted below the existing product rows.

    When all the mandatory field are filled and products added you can issue the despatch advice. To do that click on the button **SEND**. You will be notified about the successful sending by the message Successfully sent.

    Finally you will be directed to the list view of sent despatch advices (menu **DESPATCH ADVICES** tab Sent).