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The Sale Module helps organise and manage sales made by the company. It adds the concept of a sale to Tryton and allows it to be tracked through its states from draft to done. It also oversees the creation of customer shipments and invoices for the sales, and allows reports to be generated that contain aggregated sales figures.
CHAPTER ONE

USAGE

Configuration, management, and reporting tasks relating to sales can be found under the [Sales] main menu item.

1.1 Listing customers

In Tryton, by definition, the Parties that have bought Products from your Company are its customers. The Sale Module lets you get a list of these from the [Party → Parties → Parties associated to Sales] main menu item.

Tip: For some companies it is important to know which parties are, or may eventually be, customers before they have bought anything. One way you can do this is to create a Customer Category, and add all the appropriate parties to it.

1.2 Making products salable

Before you can add a Product to a Sale it must be marked as salable. When you do this you will also be able to set some additional properties such as the Unit of Measure the product is normally sold in and how long it normally takes before the product can be delivered.

1.3 Finding sale prices and availability

Before making a Sale it is sometimes useful to know how much of a Product is available, and what the sale price will be.

You can get a list of this information for the salable products by using the [Sales → Salable Products] main menu item. The Sale Context allows you to adjust the various parameters that can effect stock availability and price, such as which Warehouse will be supplying the product, who the customer is and how much they want to buy.

Tip: As with all Tryton data you can export this list to a CSV (Comma Separated Value) file by using the form’s Export menu item.
1.4 Creating a sales order

Creating a new sales order is simply a matter of creating a new Sale and adding the lines that are required. Most of the fields are optional or have sensible default values.

Tip: The sale’s reference field is intended to be used to keep track of the customer’s reference for the sale. This can be filled in at any time even when the sale is done.

1.5 Changing a sales order

The Sale needs to be in a draft state in order to change the values in most of the fields.

There are also few fields, such as the Party and Currency, which become read-only when any lines are added to the order. In order to change these without needing to remove the sales lines you can use the Modify Header button to start the Modify Header wizard.

1.6 Shipping a sale

Any goods that were sold as part of the sale are sent to the customer using a Customer Shipment.

Depending on the shipment method chosen for the sale, the customer shipment may be created for you automatically.

Tip: The customer shipments that have been generated from the sale can be found using the sale’s Shipments link.

The Shipments and stock Moves related to a sale can also be found using the items in the sale’s Open related records menu.

1.6.1 Part shipments

In some cases you may want to send a sale to a customer in stages. If you want to do this then you just need to make sure that the shipment’s inventory moves are correct. Once the shipment is packed, or the sale is processed again, the sale will automatically create a new shipment that contains any remaining quantities. This new customer shipment, often referred to as a back-order, can then be shipped at a later date, split up further, or cancelled.

1.7 Invoicing a sale

The Sale’s invoice method determines whether the sale will automatically generate Invoices.

Tip: The invoices that have been generated from the sale can be found using the sale’s Invoices link or the Invoices item found in the sale’s Open related records menu.
1.8 Handling shipment and invoice exceptions

Sometimes you may have cancelled items from a Sale’s Shipment, or cancelled a sale’s Invoice, and need to recreate them. Other times you may have cancelled things because you no longer want to ship, or invoice, them. As Tryton does not know if a cancelled item needs to be recreated, or not, it shows this as an exception in the sale’s shipment or invoice state.

For sales that have a shipment or invoice exception you can use the Handle Shipment Exception or Handle Invoice Exception wizards to recreate the items that need recreating, and ignore the rest.

Tip: When using the wizard the moves and invoices to recreate will, by default, already be selected. This means you will need to deselect any that you do not want to recreate.

1.9 Finishing a sale

In Tryton once a Sale is being processed there is no button that moves the sale into a done state. This will happen automatically once the sale’s Shipments and Invoices are completed.

1.10 Cancelling sales

You can easily cancel Sales that are not yet confirmed using the Cancel button.

Confirmed sales cannot be cancelled, but you can put them back to a state where they can be cancelled. However, as soon as a confirmed sale starts to be processed it can no longer be cancelled. This may happen immediately when it is confirmed, or after a delay if one has been correctly Configured.

Once a sale has started to be processed, to effectively cancel the sale, you must cancel its Customer Shipments and Invoices. Once you have done this you must handle the exceptions this generates, ensuring that none of the moves or invoices are selected for recreation.

1.11 Handling customer returns

Sometimes a customer may decide to return a Sale, or part of a sale, to you. In Tryton this is represented by a sale that has negative quantities.

One way of creating a customer return is to use the Return Sale wizard. This creates a new draft sales return for the whole of the selected sale.

If the customer has only returned part of the sale, then the sales return can be altered as required. When it gets processed it will automatically create Credit Notes and Customer Return Shipments where required.
1.12 Getting sales data

You can analyse aggregated sales data using the items found under the [Sales → Reporting] main menu item. These Sales Reports allow you to view sales grouped by a range of different factors.

Note: The value of the sales in these reports are always shown in the Company’s Currency.

To ensure the values that are shown are correct you must ensure that you have correctly set the currency exchange rates for any currencies that you use, including for the company’s currency.
The *Sale Module* introduces the concepts that are required to manage sales. It also extends existing concepts so sales become an fully integrated part of the system.

### 2.1 Sale

The *Sale* concept is used to manage the selling process. Each sale, at any time, can be in one of several different states. A sale progress though these states until it is either done or gets cancelled. When some of these state changes happen the Employee that triggered the state change is also recorded.

Each sale contains details of the Party that the sale is made to, including details such as the party’s preferred Contact Method, and what Addresses the shipments and invoices must be sent to.

A sale is identified by a unique number that is generated automatically from the configured Sequence. It also has other general information like a sale date, description, and reference used by the customer.

The sale is made up from one, or more, sales lines. These lines can be arranged into a particular order, if required. Normally most sales lines provide information about which Products or items are included in the sale. Extra lines can be added for things like titles, comments or subtotals.

The total, untaxed, and tax amounts for a sale are derived from the amounts, prices and Taxes of the sale’s lines.

For sales of physical items, such as goods or assets, the Warehouse the items are dispatched from is required. The sale’s shipment method determines whether Customer Shipments are automatically created for the sale, and when during the process this happens. If customer shipments do get created then the Stock Moves on these shipments are linked to the sale lines and must be recreated or ignored if they get cancelled.

**Invoices** can be generated automatically at the correct time based on the invoice method. These invoices are created from data taken from the sale, and when invoicing based on shipment they also use the quantities from the shipments. The invoices are tracked by the sale, and if they are cancelled they must either be recreated or ignored.

**See also:**

Sales are found by opening the main menu item:

*Sales → Sales*
2.1.1 Reports

Sale Report

The Sale Report is a document that can be printed out that contains all the relevant information about each sale, including the lines which have been sold.

2.1.2 Wizards

Handle Shipment Exception

The Handle Shipment Exception wizard helps the user ensure each sale has the correct Stock Moves associated with it. For stock moves that have been cancelled, it lets the user decide which should be re-created, and which should be ignored.

Handle Invoice Exception

The Handle Invoice Exception wizard helps the user make sure each sale only has the appropriate Invoices associated with it. If any of the sale’s invoices get cancelled this wizard provides the user with the option to re-create or ignore the cancelled invoice.

Modify Header

Some fields on a draft sale become read-only when lines are added to it. The Modify Header wizard allows the values in these fields to be safely updated.

Return Sale

The Return Sale wizard is used when a customer returns all or part of a sale. It creates new draft sales that match any selected sales, but with all the quantities negated.

2.2 Sale Context

The Sale Context allows the user to set a context in which a Product’s properties are then calculated.

This is used when showing a list of salable products. It allows the user to select a customer and some other properties, and then get a list of products that are available along with their prices in the selected Currency.

See also:

The Sale Context is used to provide context in the main menu item:

\[ Sales \rightarrow Salable Products \]
2.3 Sale Reporting

Each of the different Sale Reporting concepts are based on either an Abstract sales report, or an AbstractTimeseries. There is also a base Context that is inherited and used to specify things such as the date range that is used by the report.

The Abstract provides the basic properties that makes up a sales report including the number of sales and revenue. The AbstractTimeseries is used to extend this with a date. This is used in sales reports that cover multiple periods of time. These are combined together with additional specific properties to create the different sales reports.

See also:

Sales reports can be accessed from the main menu item:

Sales → Reporting → Sales

2.3.1 By Customer

The sales reporting that is done By Customer splits the sales up based on what each Customer bought. This is done in two separate parts. One that shows the sales, in total, for the selected period from the Context. Another that breaks them down by date into smaller chunks.

2.3.2 By Product

Sales reporting that is done By Product splits up the sales based on the Product that was sold. This is structured as two parts. One that shows the total sales for the selected period of time, and another that shows how the sales were distributed over time.

2.3.3 By Category

The By Category sales reporting shows the sales based on the Category that a product is in. This works in the same way as the By Product sales reporting, but there is also an additional report that shows the categories in their natural tree structure.

2.3.4 By Region

The sales reporting that is done By Region shows sales based on where the customer is located. This is done by combining together in a tree structure the sales By Country below which are the sales By Subdivision.

By Country

The By Country concept groups sales based on the Country in which the customer is located. This is done in two parts, one for total sales and one showing how the sales were distributed over time.
**By Subdivision**

The *By Subdivision* concept groups sales based on which *Subdivision* of a country a customer is located. This is done in two parts, one for total sales and one showing how the sales were distributed over time.

**Wizards**

**Open Region**

The *Open Region* wizard ensures that the correct type of time series gets opened. This may be a time series for either a country, or subdivision, depending on what line from the *By Region* was opened.

### 2.4 Configuration

The *Sale Configuration* concept is used for the settings that affect the general behaviour and default values for sales related activities.

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**Note:** Some of the sales configuration options have no effect unless the *Task Queue* has been setup and some workers are running.

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**See also:**

Sales configuration settings are found by opening the main menu item:

\[ Sales \rightarrow Configuration \rightarrow Sales Configuration \]