

# End User Guide (View Order to Cash)

Createch 365

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## Revision history

Version	Date	Revision Description	Prepared by
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## Objective User guide

The objective of this user guide is to present the report **View Order to Cash** to facilitate the research of the status of a sale order from its creation to the payment of the invoice. The report presents the Sales Order with quantity not transfer to an invoice.

1. Access the **View Order to Cash**
2. Analyze the information of the report and use the Drill Down function to access a specific document
  - Sales Order
  - Purchase Orders
  - Sales Shipments
  - Sales Invoices
  - Payments

## 1. Access the report View Order to Cash

This section describes the steps to access the report.

The report is located in the **Home page (Sales Order Processor Rolecenter)** of the user, under the Insights section. You can also search for the page "Order to Cash". The starting point of the report is the Sales Order No.

Each time a transaction is processed, the View Order to Cash updates the information so the user can have a quick overlook of the status of the sales order. When all the items of the Sales Order are attached to an invoice, the Sales Order No. will disappear from the report and the user will have to use a different process to analyze the information.

The user can follow all the transaction documents that are related to the Sales Order No.

- Purchase Order (by using the Drop Shipment process)
- Sales Shipments
- Sales Invoices
- Payments

## 2. Analyze the information of the report and access a specific document

On the View Order to Cash, all documents from the Sales Order to the Payments can be drilled down to see the document information. You will be able to see the number of posted documents related to the released sales order.

Order to Cash						...
NO.	SELL-TO CUSTOMER NAME	SALES SHIPMENTS	SALES INVOICE	PURCHASE ORDER	PREPAYME..	
S-ORD101008	...	School of Fine Art	1	2	1	
S-ORD101012		Adatum Corporation	0	0	1	

Once you select what documents you would like to see, click on the number and a list of documents will be on the next page. You will then be able to select the document you would like to view if you choose to do so.