Sales: how-to guide

IntraSync
November 21, 2026

Sales takes over an order once it is won in Estimating and gets it ready for production. You prep each line with a product, a piece mark and its make instructions, sync them to the production order, work through a readiness checklist, and then follow the order through production. Where your system switches them on, you also keep each project's addresses and sign off custom items. You can fill in your customers' billing details and contacts from QuickBooks or a spreadsheet. If your company keeps its orders in its own system, Sales reads them there and changes none of them. Salespeople and sales managers each have a board on the Sales Dashboard that shows what needs them.

Written for: Salesperson, Sales coordinator, Sales manager, Production planner, Plant manager.

In the pictures, a numbered red box marks where to click or type. Where a picture has more than one box, the numbers give the order.

In this guide

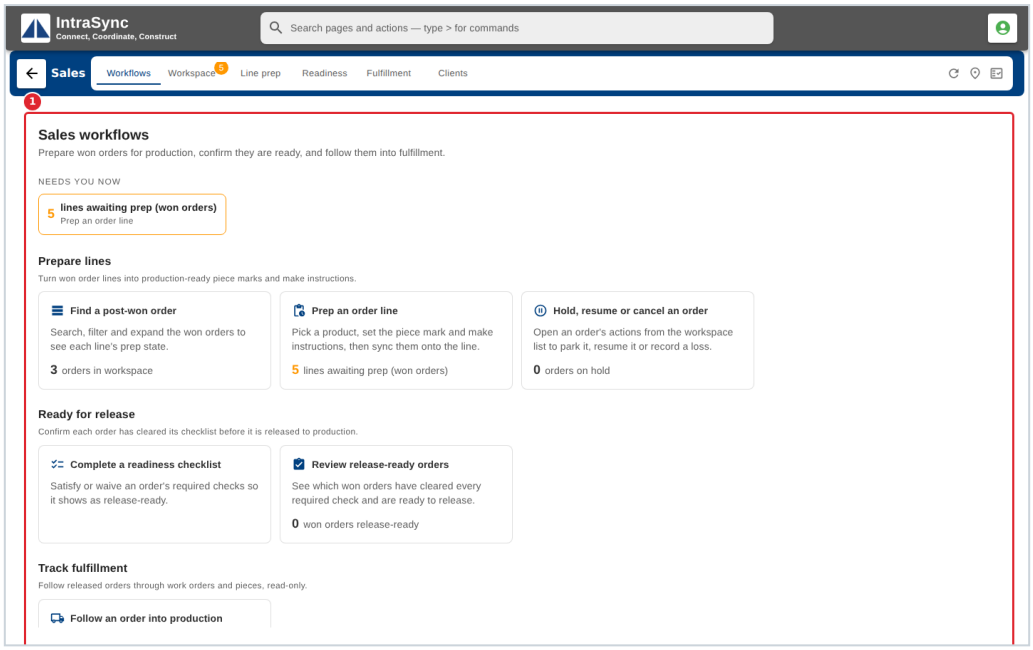
- 1. Find your way around the Sales hub
- 2. Start your day from your sales board
- 3. Find an order and see how far its lines are prepped
- 4. Fill in a project's addresses
- 5. Prep one order line
- 6. Add make instructions to a line
- 7. Sync a prepped line to the production order
- 8. Prep every line of an order in one pass
- 9. Sign off a custom item
- 10. Work through an order's readiness checklist
- 11. Add your own readiness check
- 12. Track what production has made against an order
- 13. Check what you can do with one line
- 14. Put an order on hold, and resume it
- 15. Look up a client and their orders
- 16. Fill in customer billing and contacts from QuickBooks or a spreadsheet
- 17. Work with orders your own system keeps
- 18. Watch the team's sales work on the manager board

1. Find your way around the Sales hub

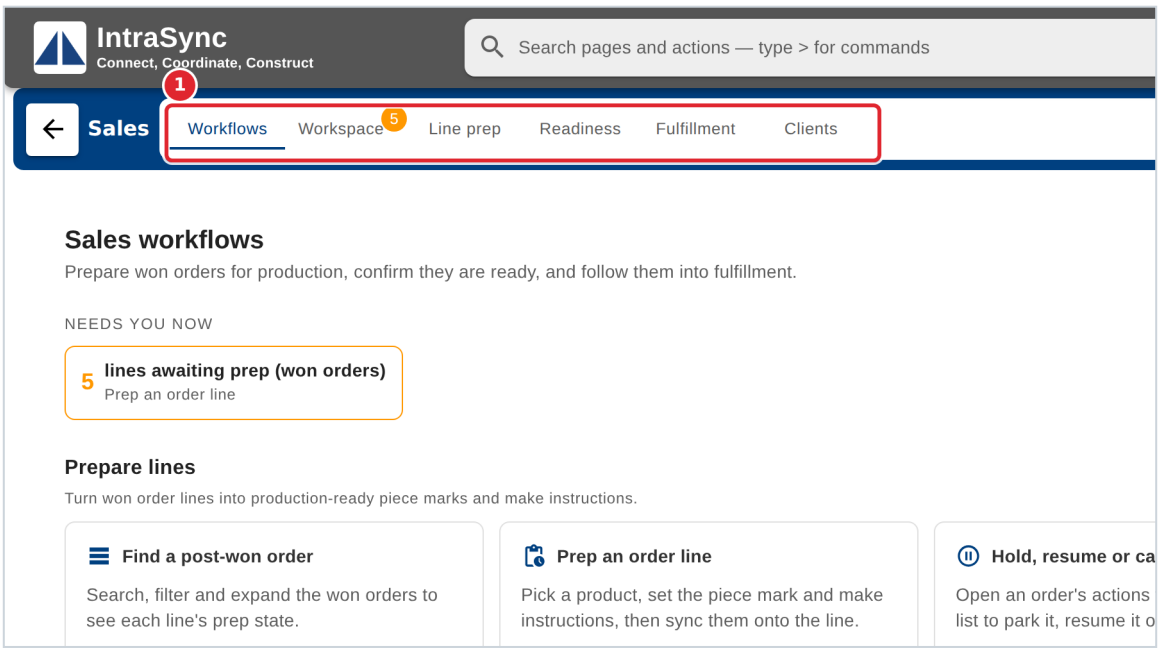
Know where each part of post-won order work lives, and see at a glance what is waiting for you.

Before you start:

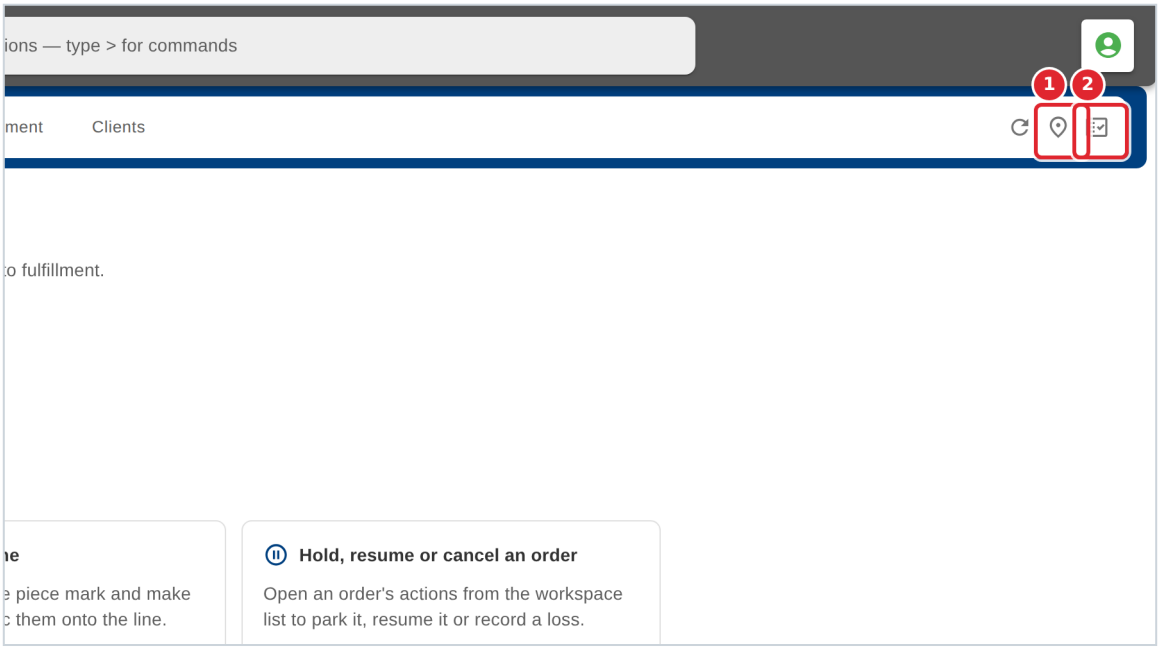
– You can open Sales from the main menu.



Step 1. Open Sales. The hub opens on Workflows, which lists the work waiting for you.



Step 2. Use the tabs to move between Workflows, Workspace, Line prep, Readiness, Fulfillment and Clients.



Step 3. At the top right, Project addresses opens the project form and Custom item approvals opens the approvals screen. Each is offered only when your system has it switched on.

– Step 4. Select the refresh button at the top right to reload what the current tab shows. Its tooltip names what it will reload.

Tips:

– Each card on Workflows opens the tab where that work is done, so it is the quickest way in when you are not sure where to start.

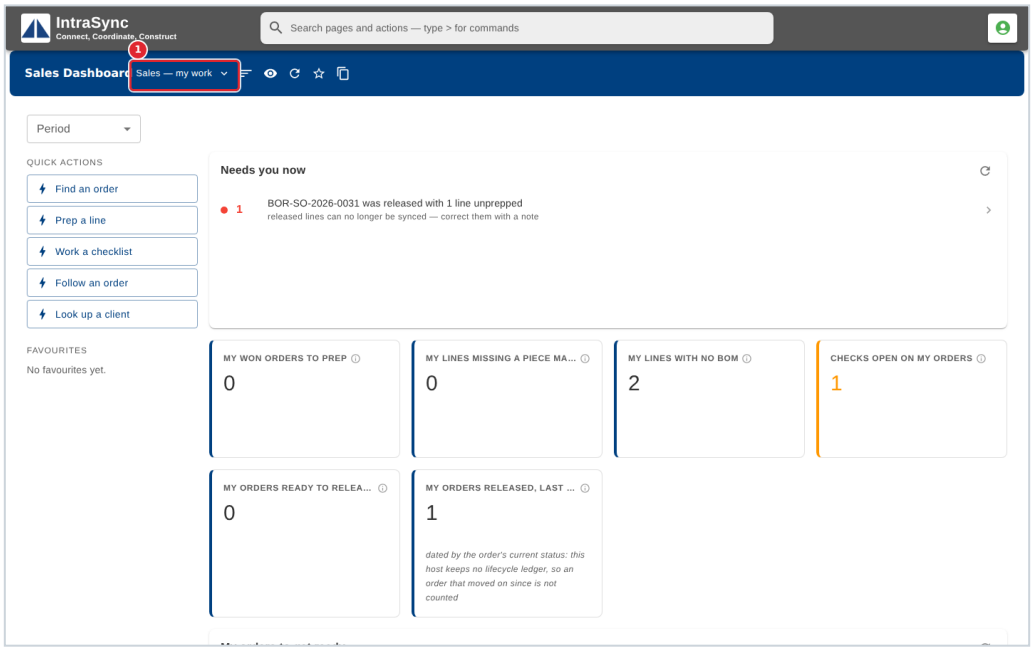
This is shown in the Sales video at 0:03.

2. Start your day from your sales board

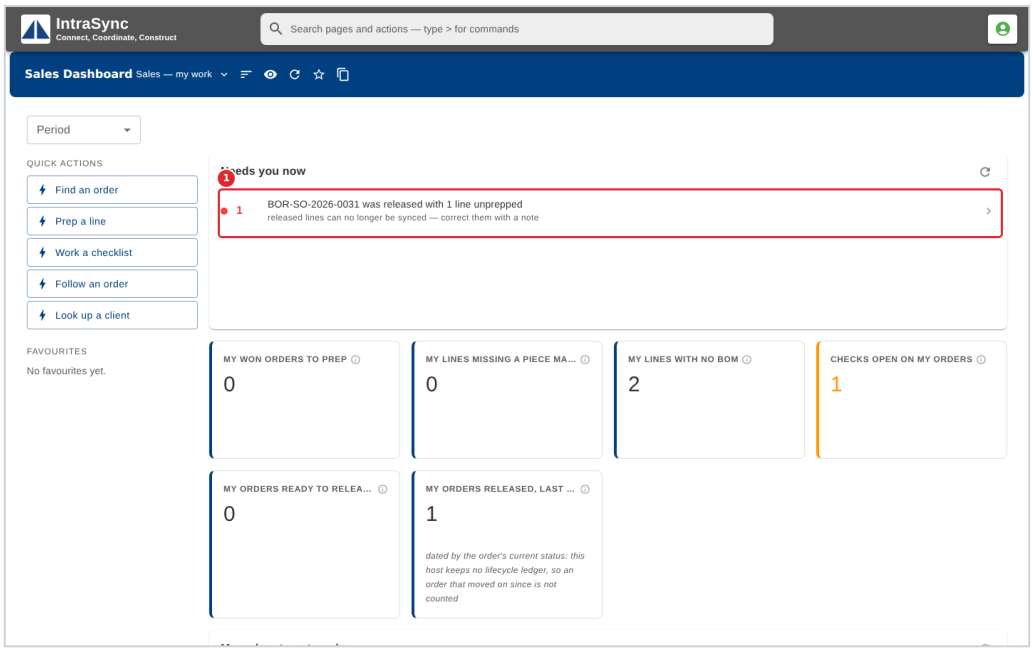
See what needs you on your own orders, and jump straight to the work, without searching the hub.

Before you start:

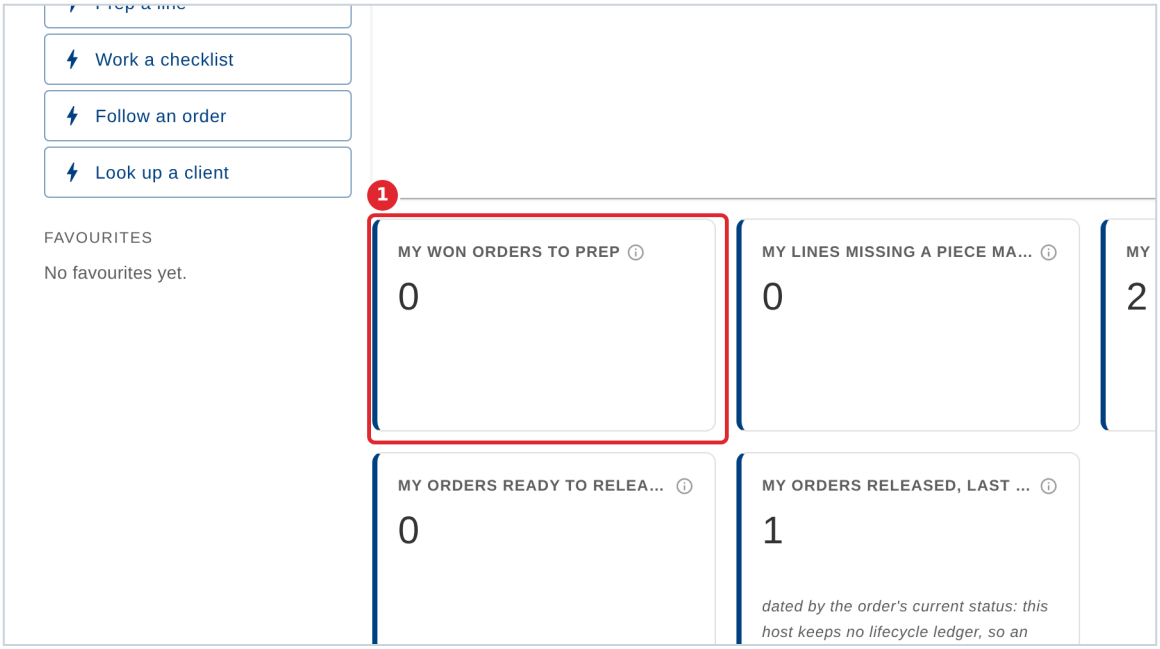
- Your company has the Sales Dashboard switched on.
- The figures on this board count your own orders: the ones where you are the salesperson.



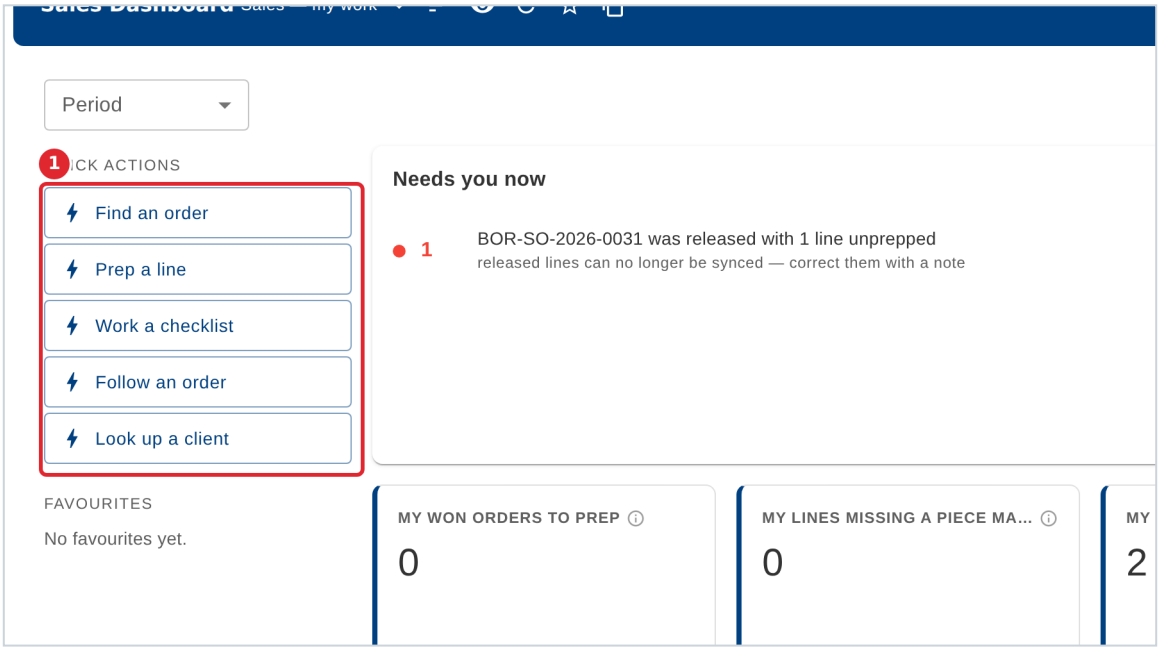
Step 1. Open the Sales Dashboard. A salesperson lands on their own board, Sales — my work.



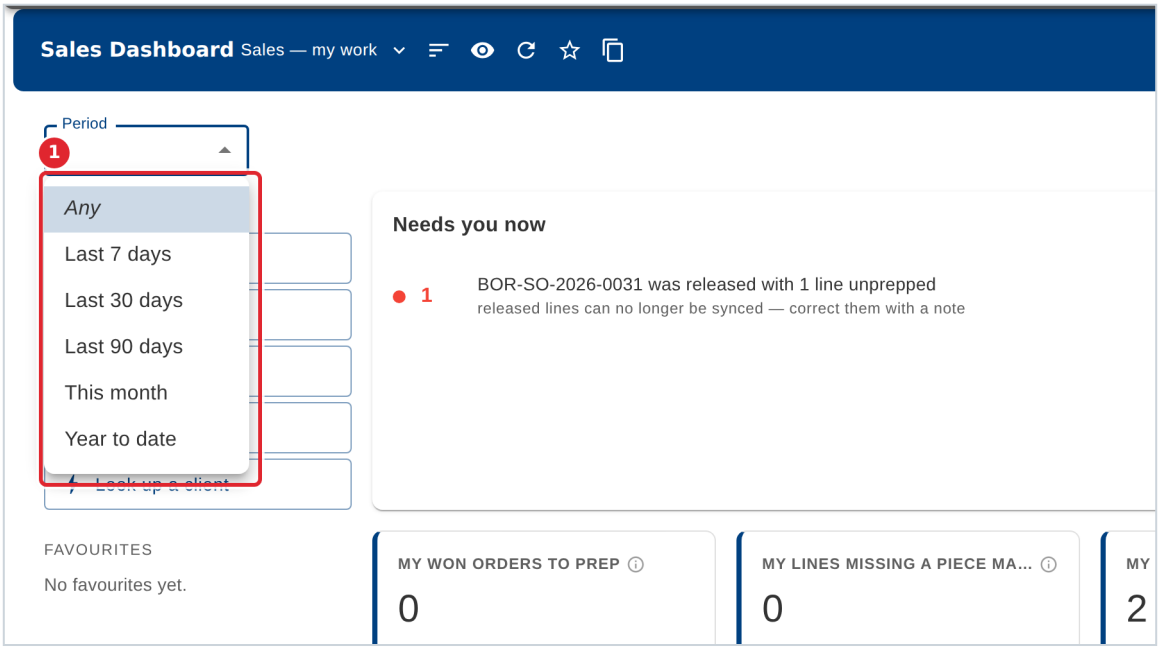
Step 2. Needs you now lists the most urgent things on your orders, and why each one needs you.



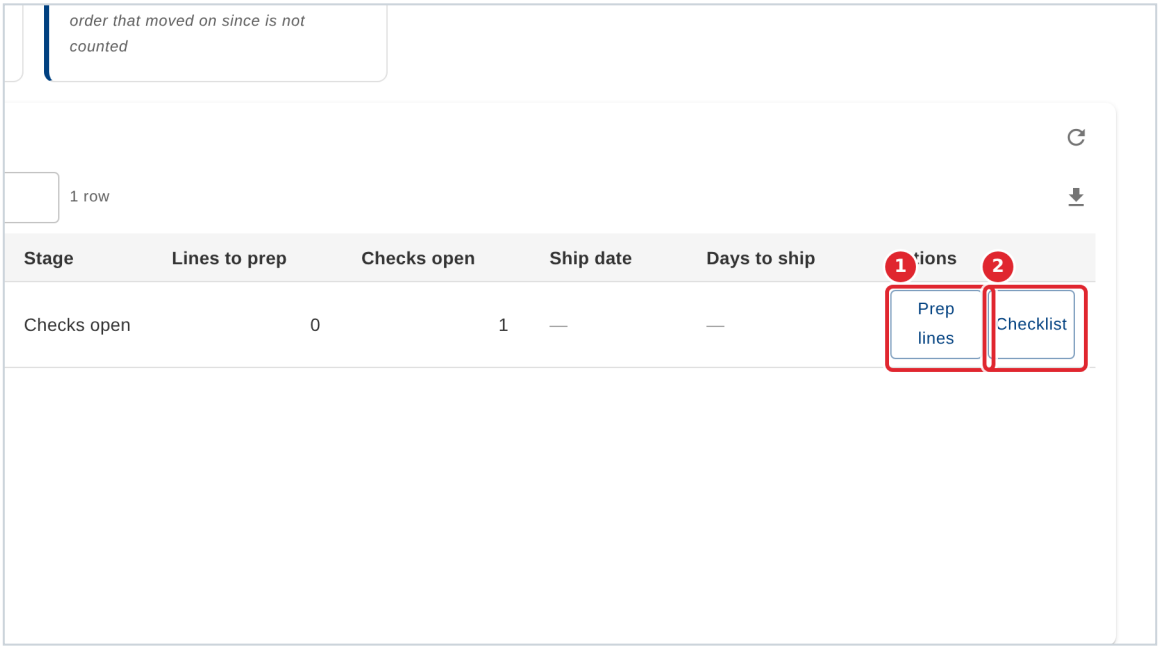
Step 3. Each tile counts one part of your own work. Point at the information icon beside a tile's title to see what it counts.



Step 4. Use Quick actions to go straight to a task in Sales: find an order, prep a line, work a checklist, follow an order or look up a client.



Step 5. Use Period to choose the window the figures cover, from the last week to the year so far.



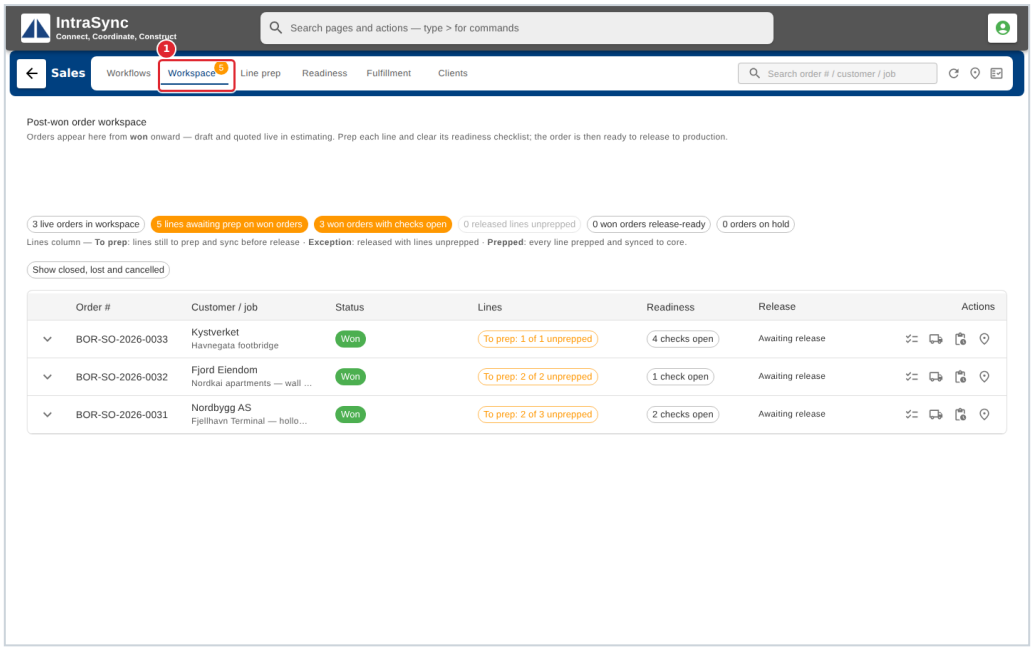
Step 6. My orders to get ready lists your orders still in prep. Select Prep lines or Checklist on a row to go straight to that work.

Tips:

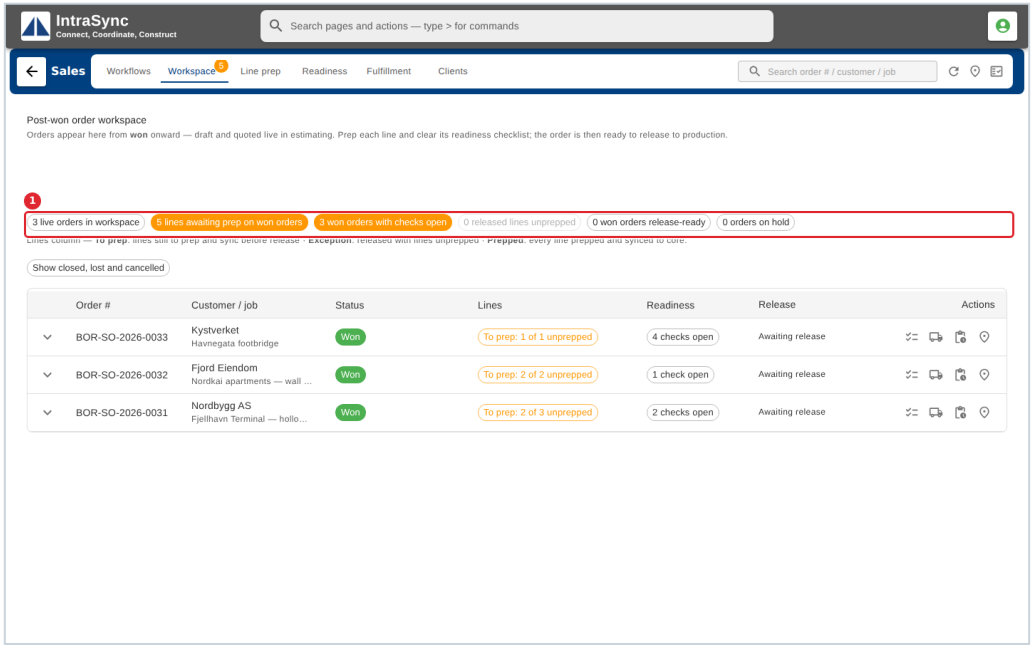
- Some tiles carry a note under the figure that says how it is counted. Read it before comparing a figure with another report.
- The star beside the board name makes this board the one you land on when you open the Sales Dashboard.

3. Find an order and see how far its lines are prepped

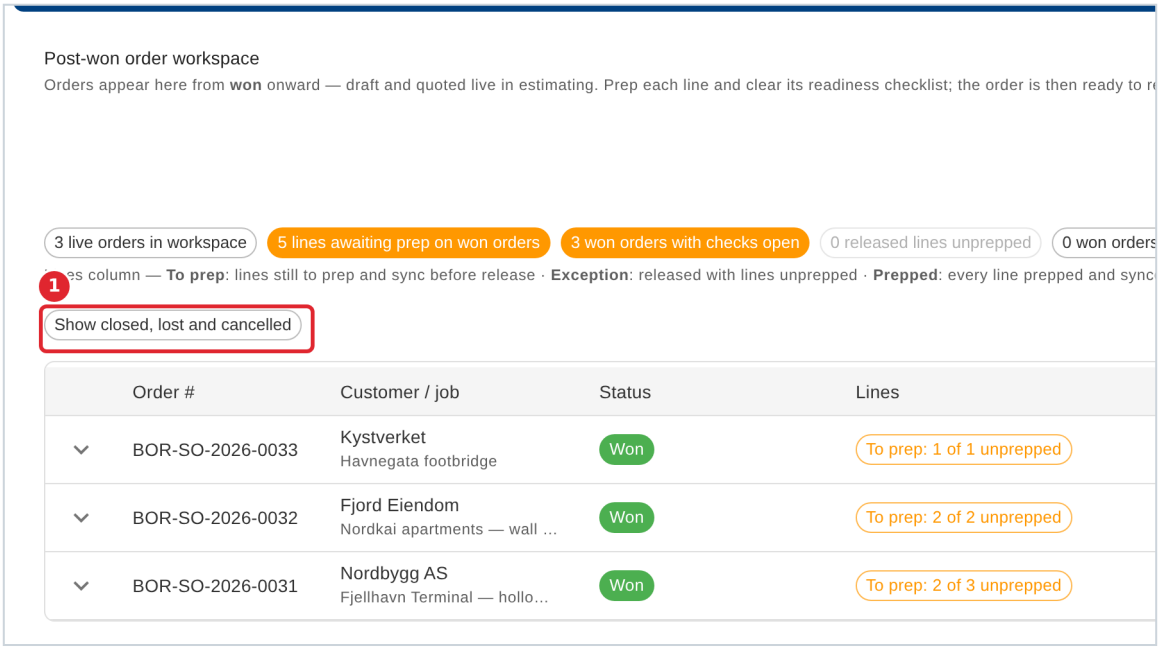
Every won order arrives in the Workspace. Find the one you need and check which of its lines still need prep.



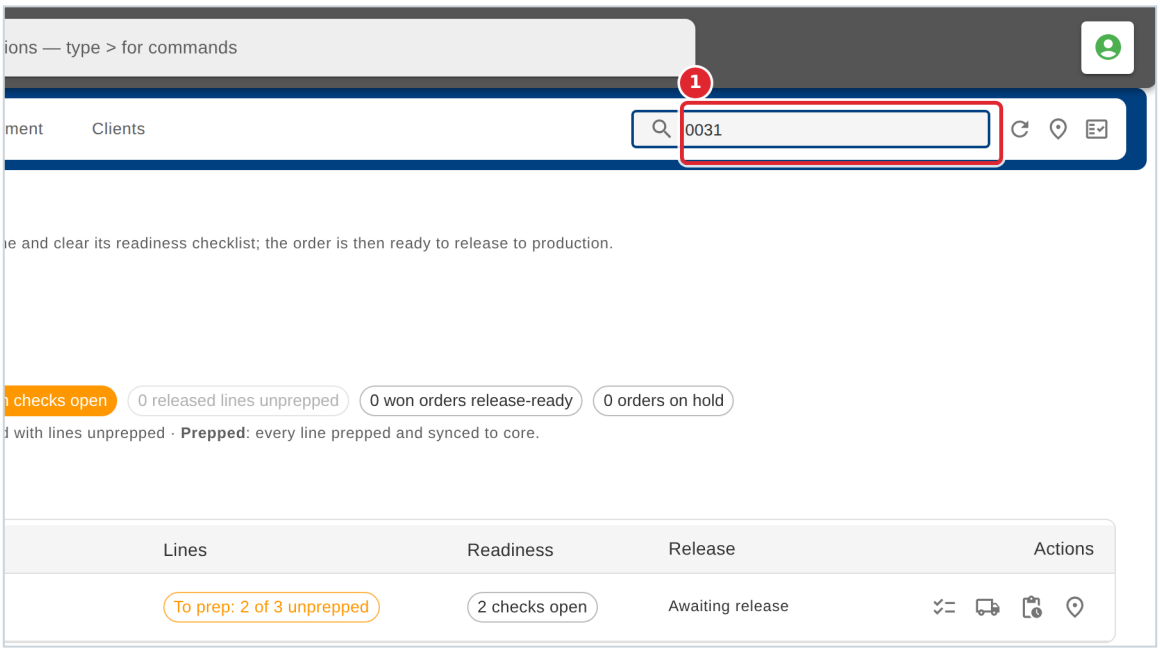
Step 1. Select Workspace.



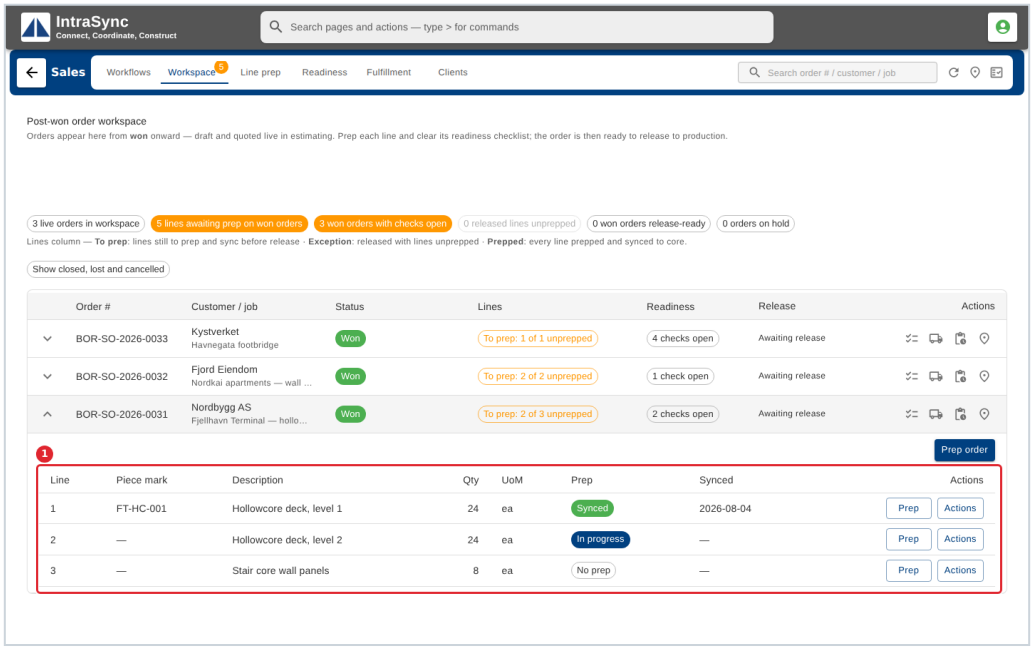
Step 2. Read the summary: how many orders are live, how many lines still need prep, and how many checks are open.



Step 3. Use the filter chips to narrow the list, or Show closed to include closed, lost and cancelled orders.



Step 4. Type part of an order number, a customer or a job in the search box.



Step 5. Select an order's row to expand it. Each line shows its piece mark and its prep status.

Tips:

- The list puts the most recently changed order first.
- Closed, lost and cancelled orders are hidden until you select Show closed.
- The Lines column leads with a word, To prep, Exception or Prepped, so you can read it without relying on colour.

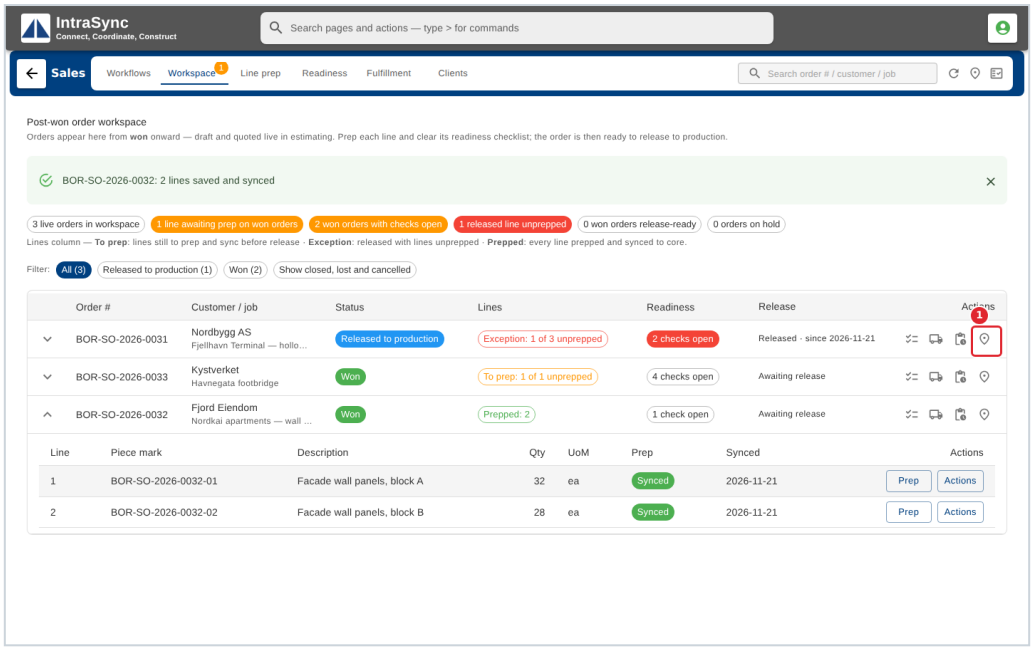
This is shown in the Sales video at 0:06.

4. Fill in a project's addresses

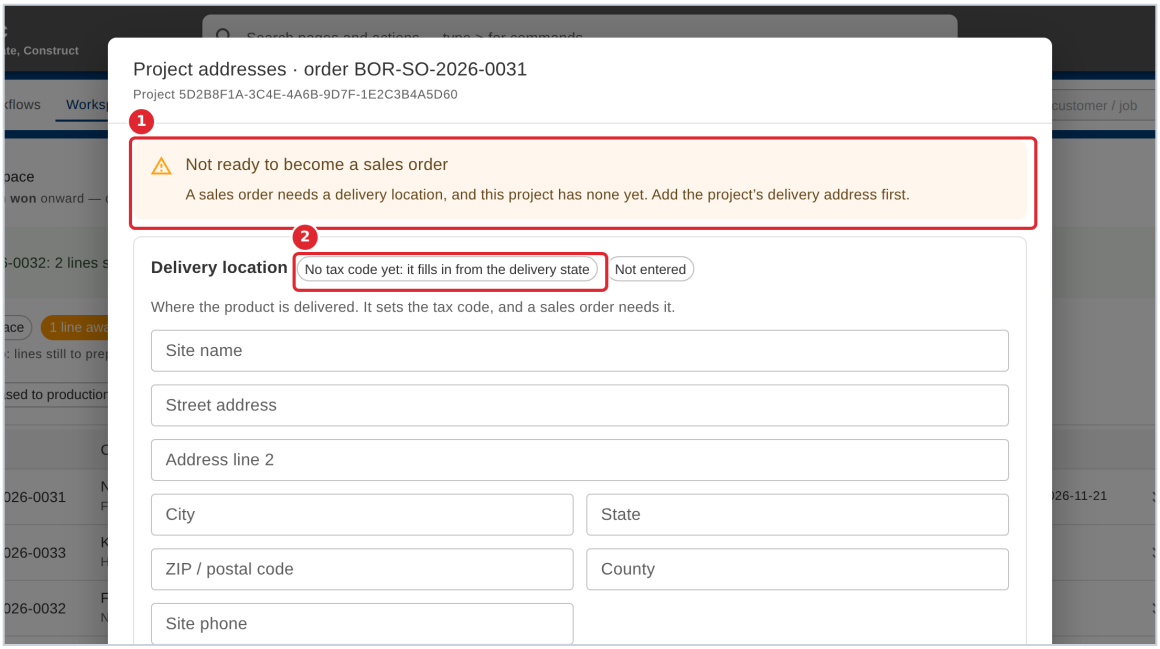
Record where a project's product is delivered, where its invoices go, and who receives its lien notice. The delivery location also sets the project's tax code.

Before you start:

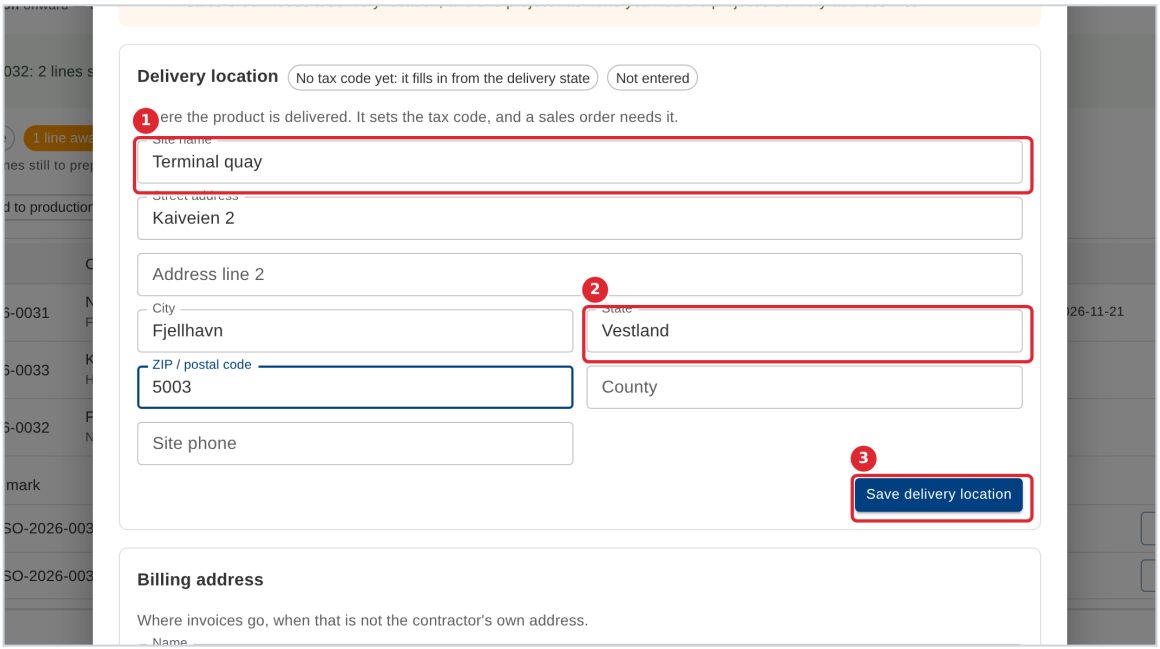
- Your system has project addresses switched on. Otherwise the Project addresses button is not shown.
- The order belongs to a project. An order with no project has no addresses of its own: open the form from Project addresses at the top right of the hub instead, and enter the project ID the estimate carries.



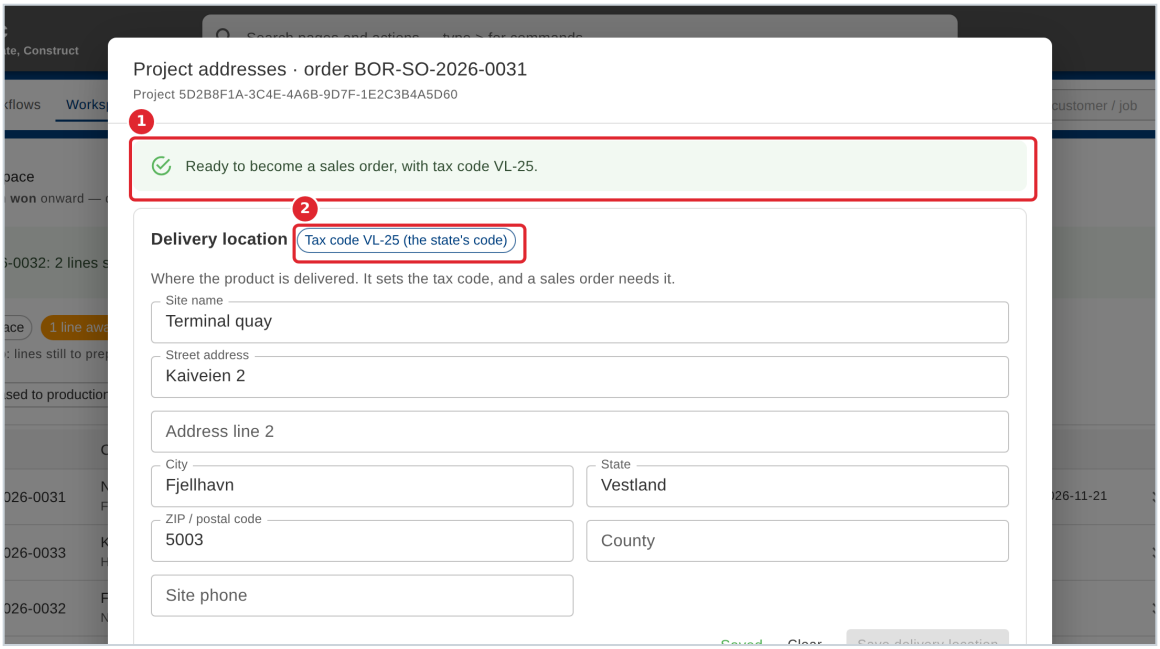
Step 1. On the order's row, select Project addresses.



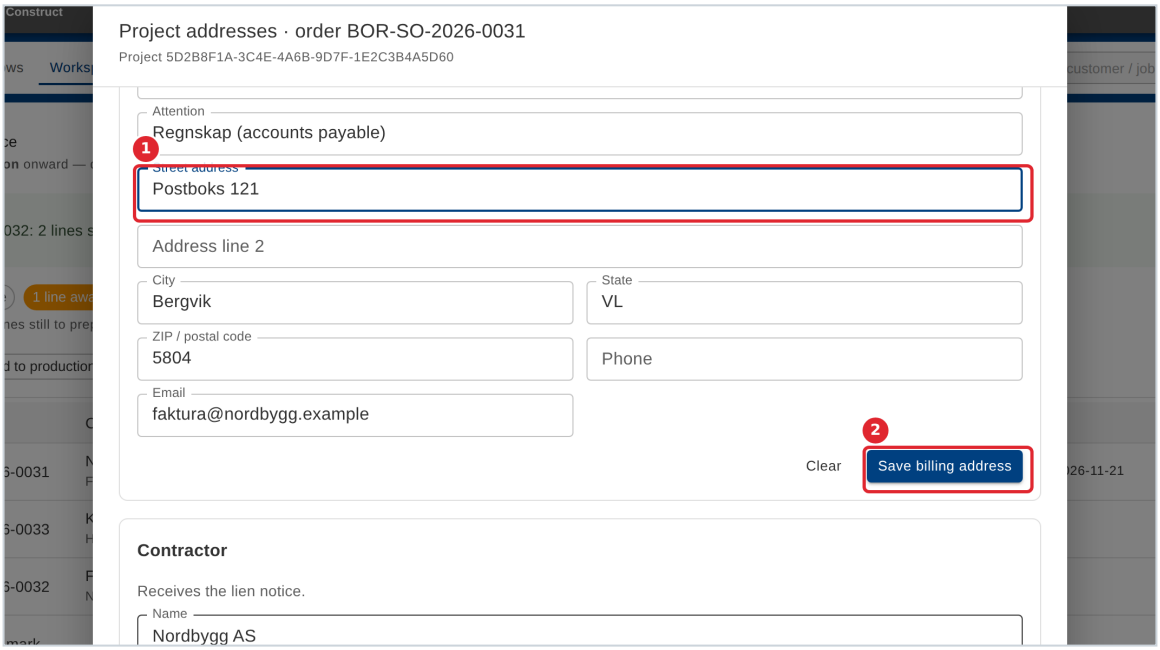
Step 2. The project form opens on the order's project. When the project cannot become a sales order yet, the warning at the top says why.



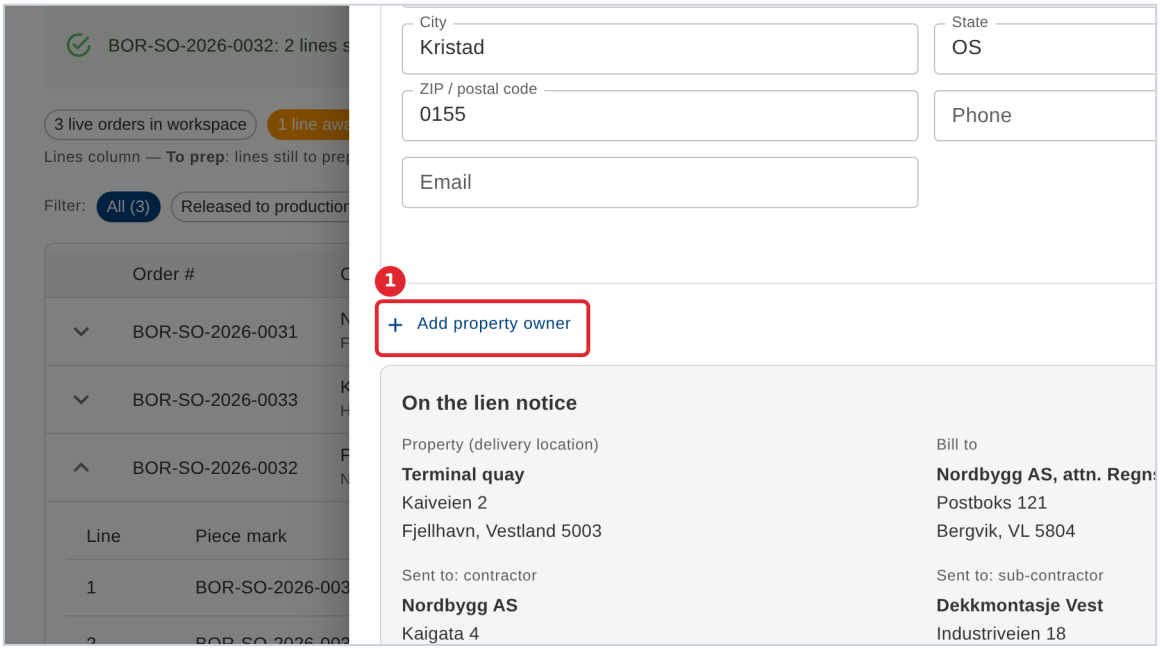
Step 3. Under Delivery location, enter the site name, street address, city, state and ZIP or postal code, then select Save delivery location.



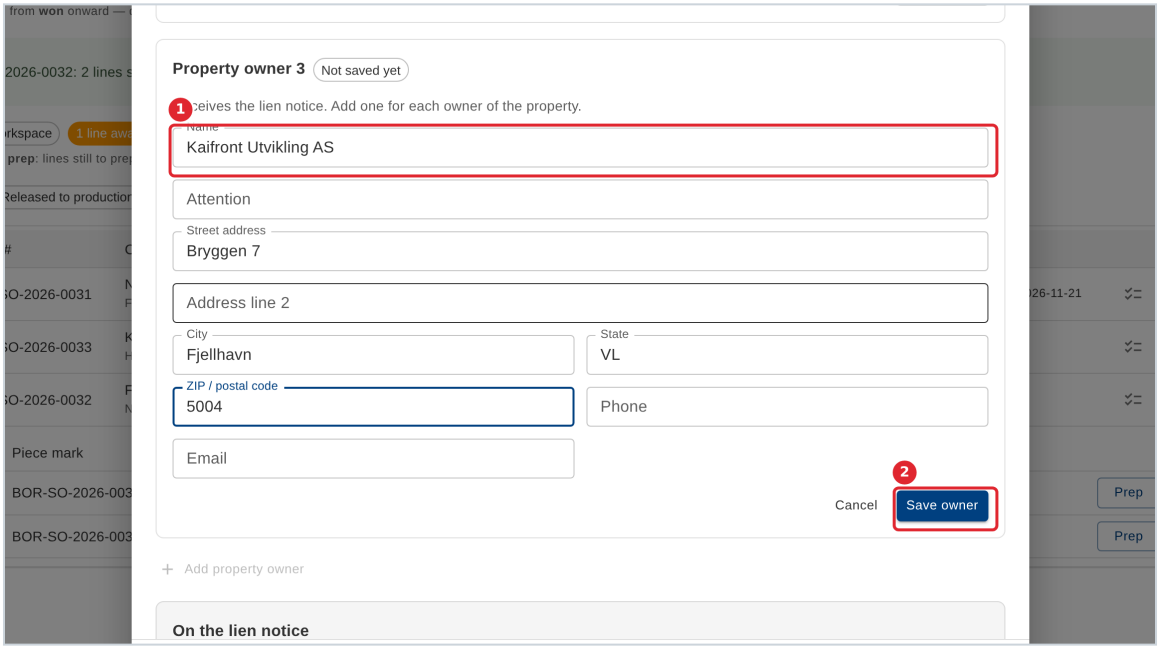
Step 4. The tax code fills in from the delivery address, and the message at the top now says the project is ready to become a sales order.



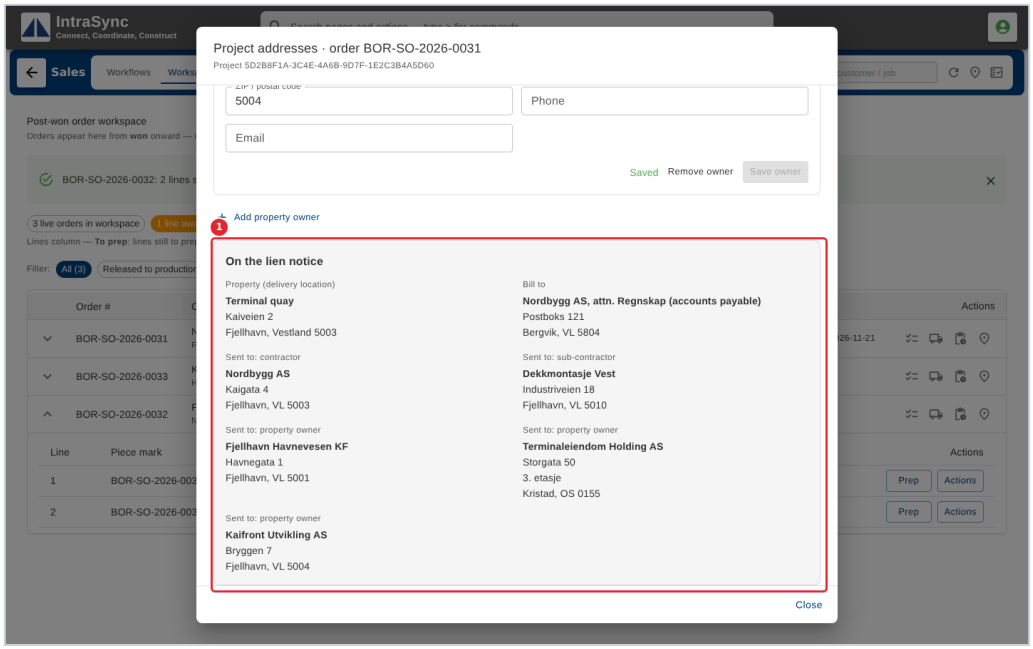
Step 5. Each card saves on its own. Change the billing address, then select Save billing address. The contractor's address is not changed.



Step 6. To add a property owner, select Add property owner. Add one for each owner of the property.



Step 7. Enter the owner's name and address, then select Save owner.



Step 8. Under the cards, On the lien notice shows the addresses the notice is filled in from: the property, the bill-to, and everyone it is sent to.

Tips:

- When your system asks for a delivery location before a sales order, a project without one is not ready to become a sales order, and the message at the top of the form says what is missing.
- You never type the tax code. It fills in from the delivery address when you save it. If your system does not set tax codes, the form says so.
- Fill in the billing address only when invoices go somewhere other than the contractor's own address.
- The lien notice is sent to the contractor, the sub-contractor and every property owner. If one of their addresses is incomplete, On the lien notice says what is missing.
- A card cannot be saved while one of its fields has a problem, such as an email address with no @ in it. The card says what to fix.
- Clear empties a saved card, and Remove owner takes a property owner off the project.

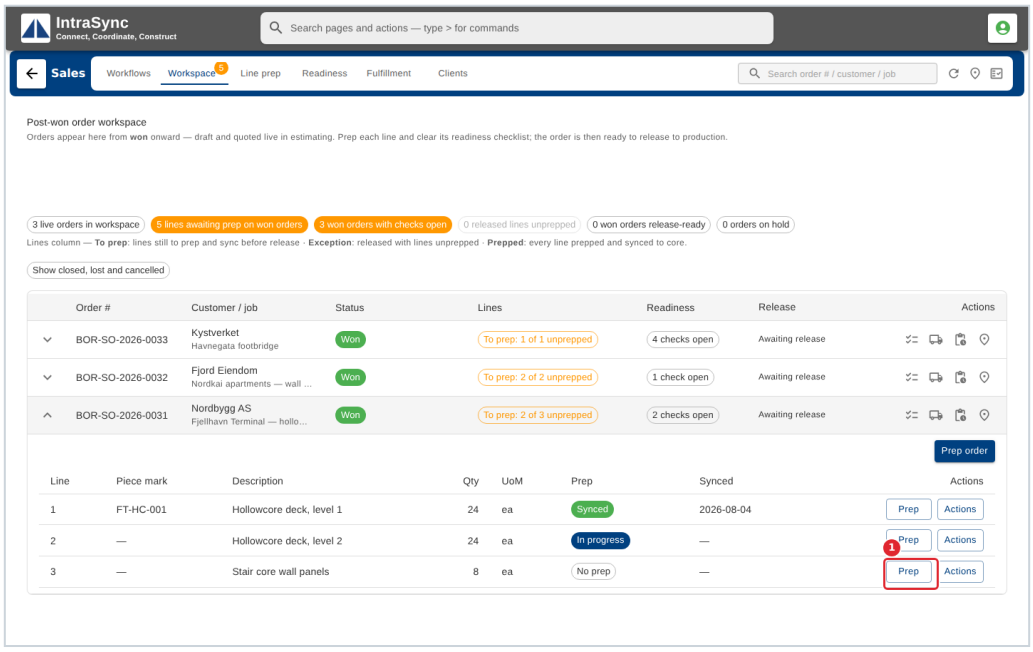
This is shown in the Sales video at 2:32.

5. Prep one order line

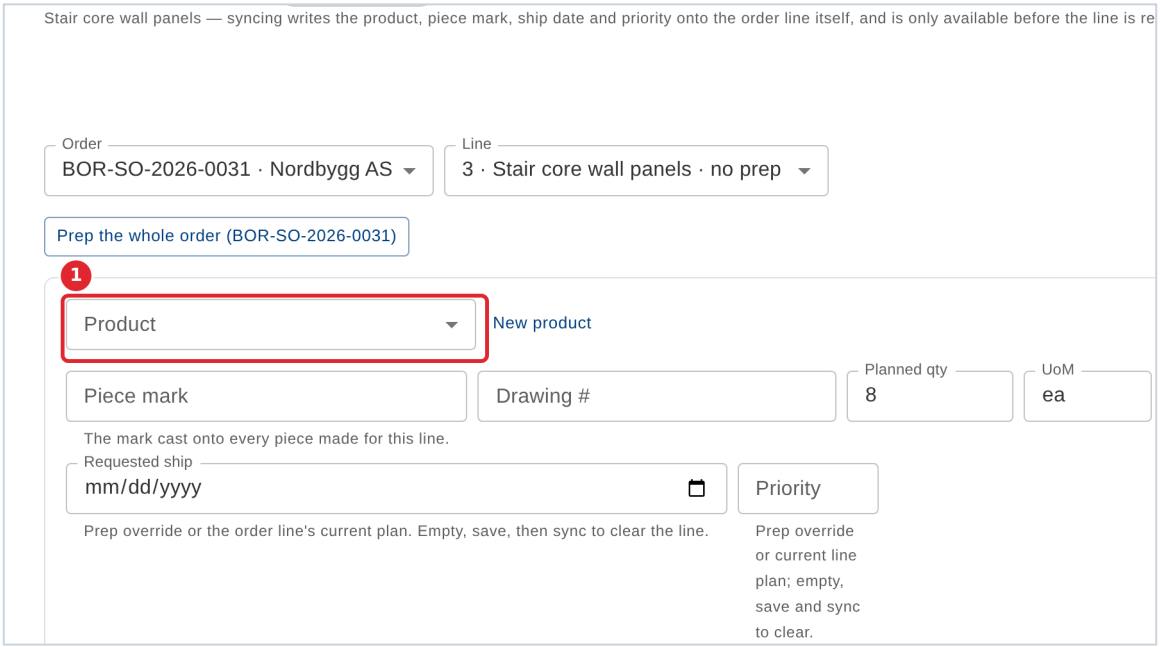
Give a won line what production needs to make it: a catalog product, a piece mark and a definition status, and a note for anyone who works on the line after you.

Before you start:

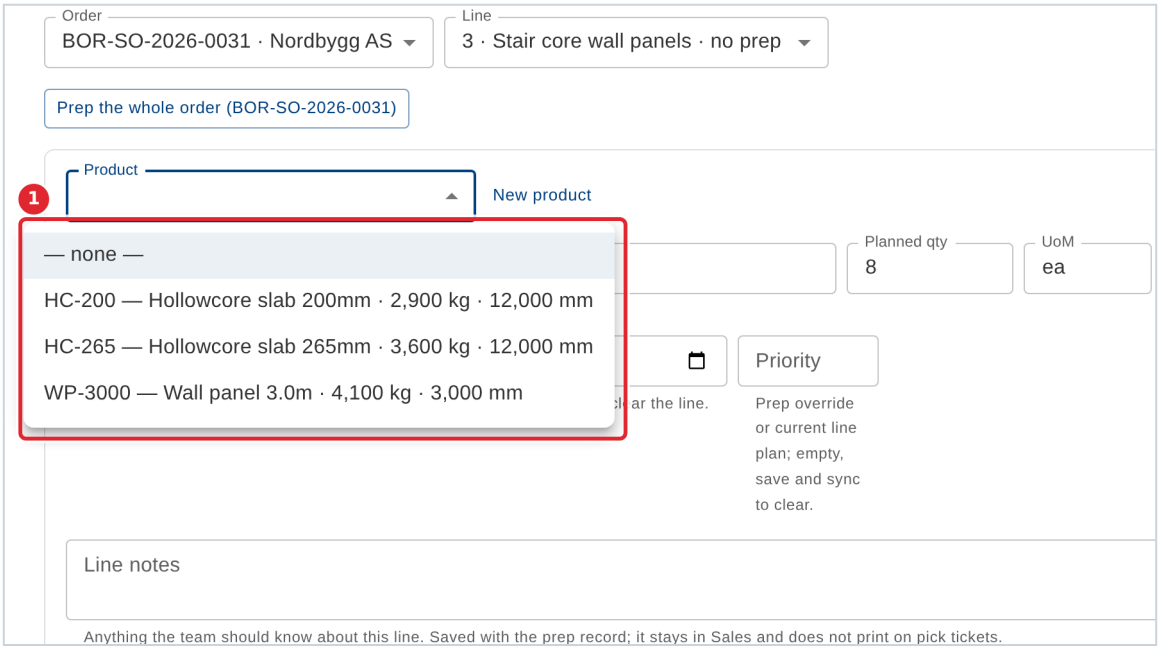
– The order is won and appears in the Workspace.



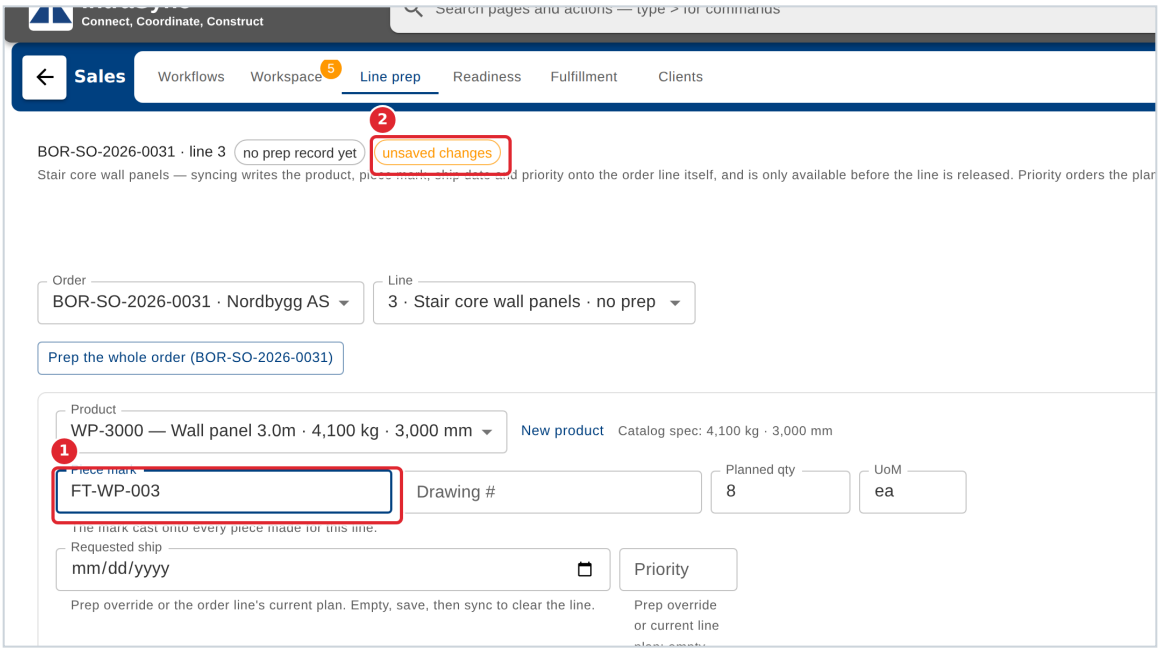
Step 1. On a line marked No prep, select Prep.



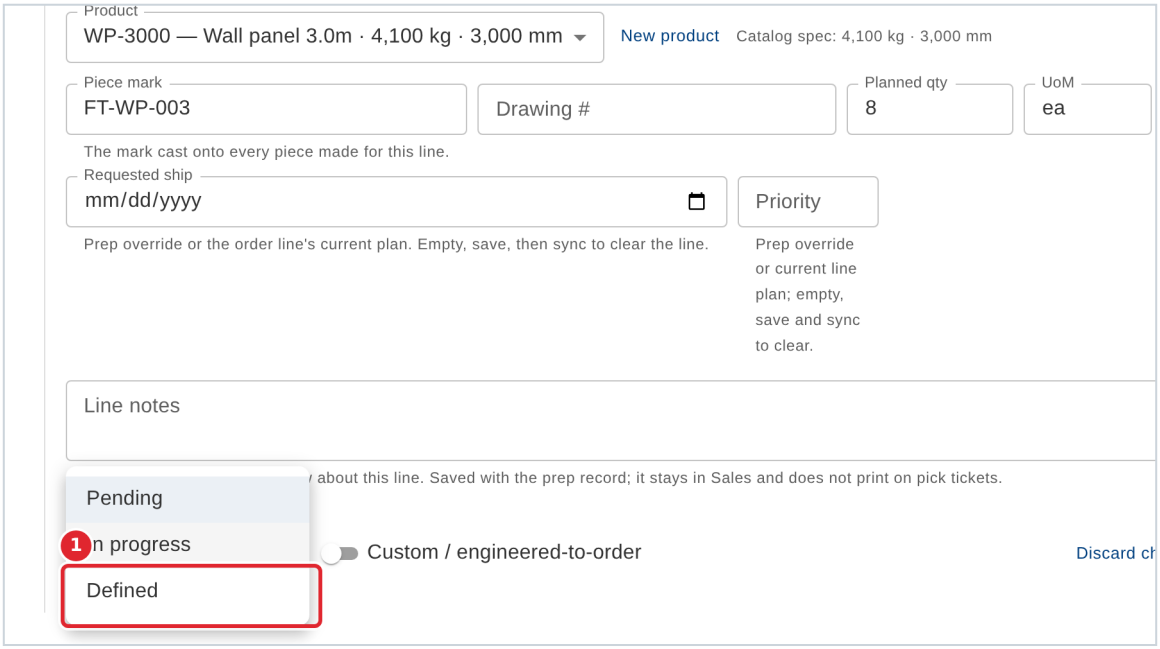
Step 2. Line prep opens on that line. Select the Product list.



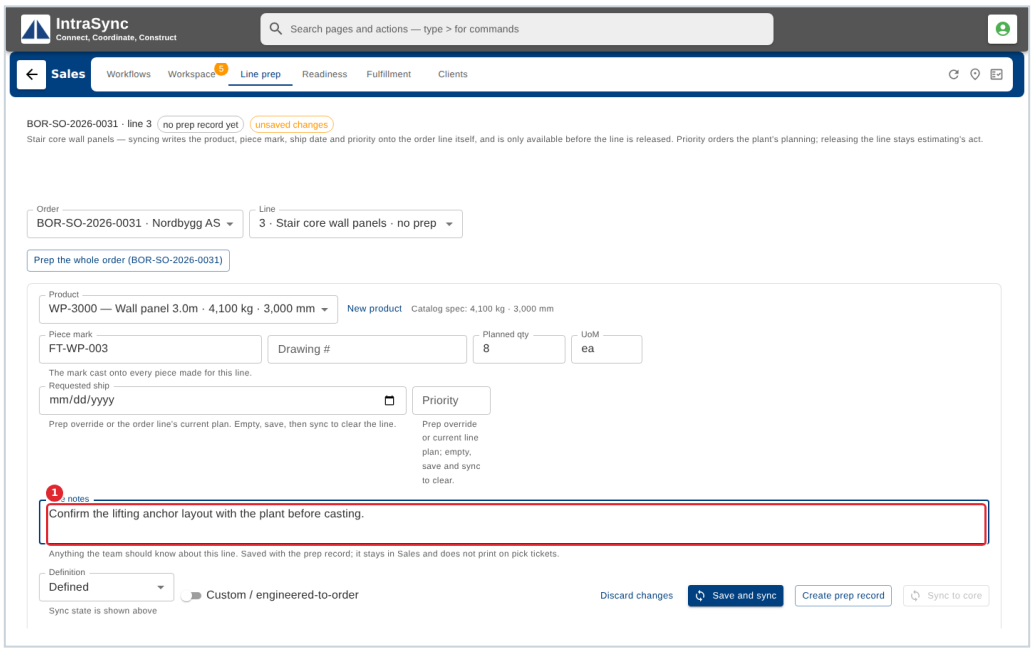
Step 3. Choose the catalog product. Its standard size and weight are shown beside the list.



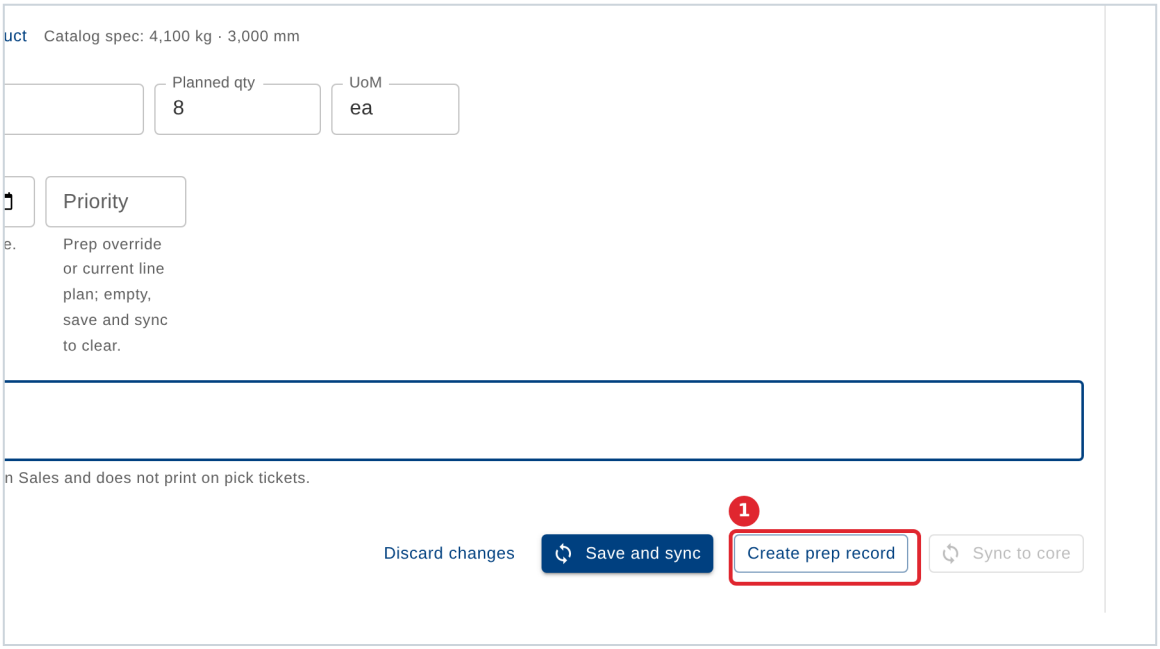
Step 4. Enter the piece mark. Unsaved changes are flagged until you save.



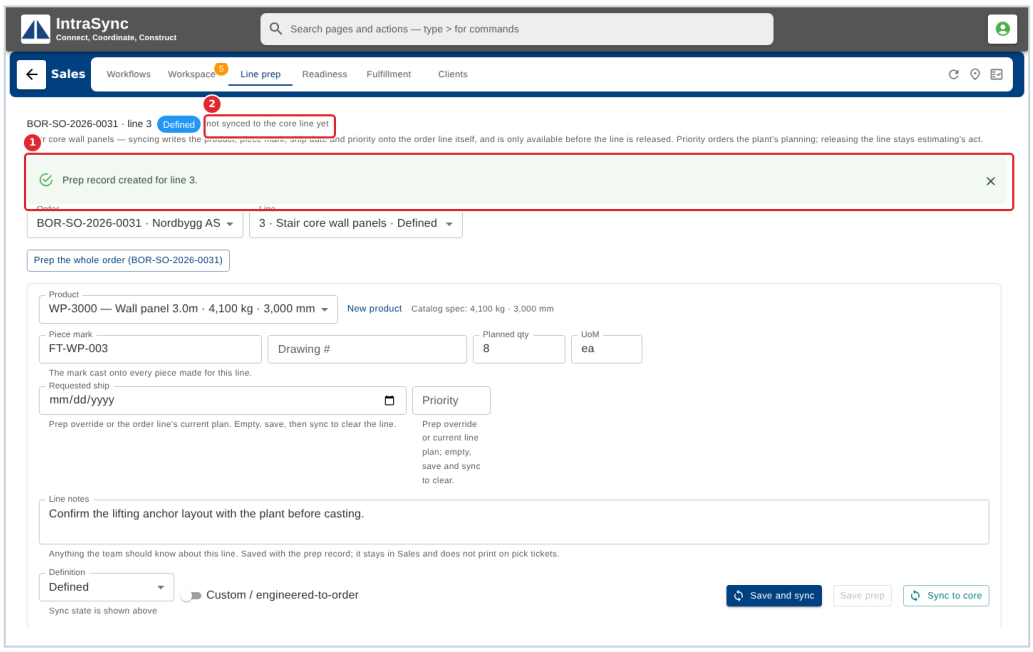
Step 5. Set Definition to Defined when the line is fully specified.



Step 6. Type anything the team should know about this line in Line notes. The note is saved with the prep record.



Step 7. Select Create prep record.



Step 8. A confirmation appears, and the panel says the line is not synced yet.

Tips:

- The piece mark is how production and billing match a cast piece back to this line. Give every line one.
- A line note stays in Sales. Sync to core does not copy it to the production order line, and it does not print on pick tickets. Changing only the note on a synced line keeps the line synced.
- If someone else saves a different note on the line while you have it open, your save does not overwrite theirs. Your text stays in Line notes and their note is shown in a yellow box under it. Combine the two, then save again, or select Discard changes to keep theirs.
- If you switch to another line with unsaved changes, Line prep asks before it discards them.
- Creating the prep record does not change the production order yet. That happens when you sync.

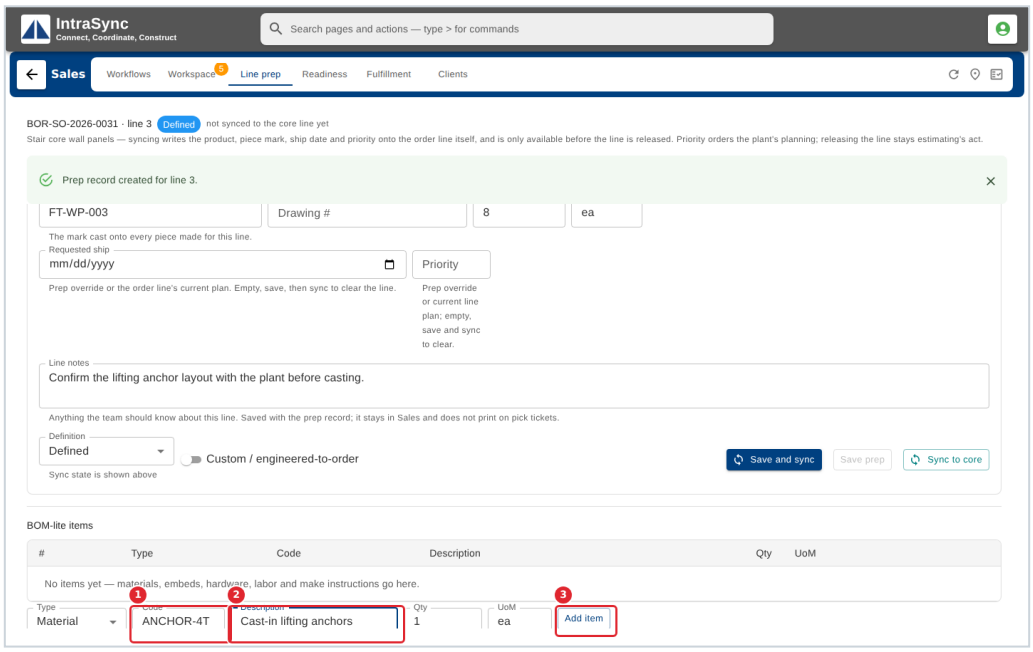
This is shown in the Sales video at 0:17.

6. Add make instructions to a line

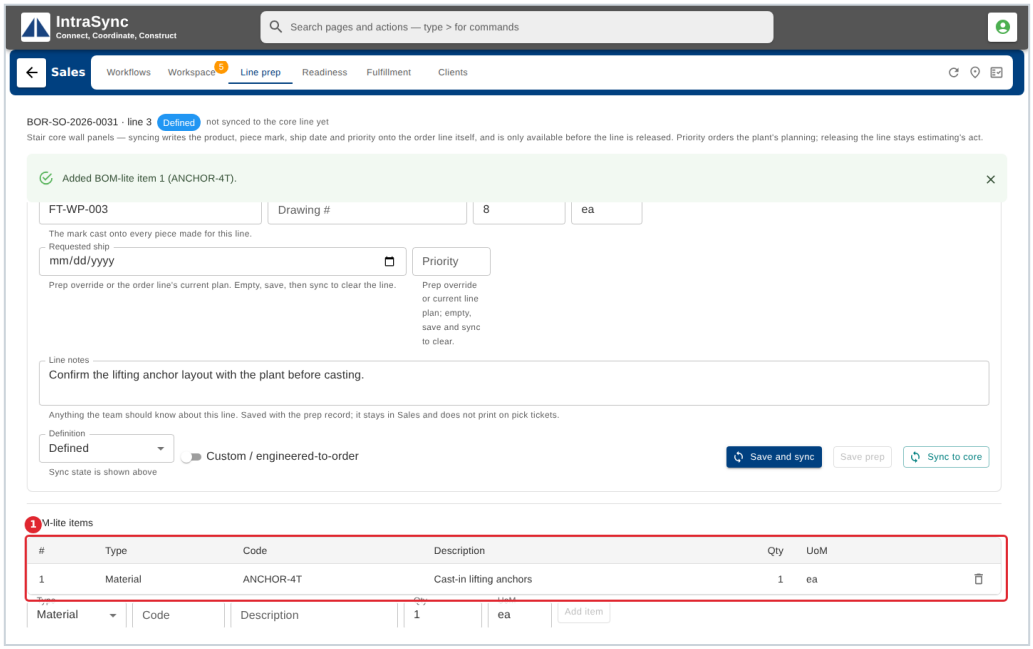
List the materials, embeds, hardware and labour a piece needs, so the plant has them in front of them.

Before you start:

- The line has a prep record.



Step 1. Under make instructions, enter a code and a description, then select Add item.



Step 2. The item is added to the line's list.

Tips:

– Add item stays unavailable until the item has a code or a description, so a blank row cannot be saved.

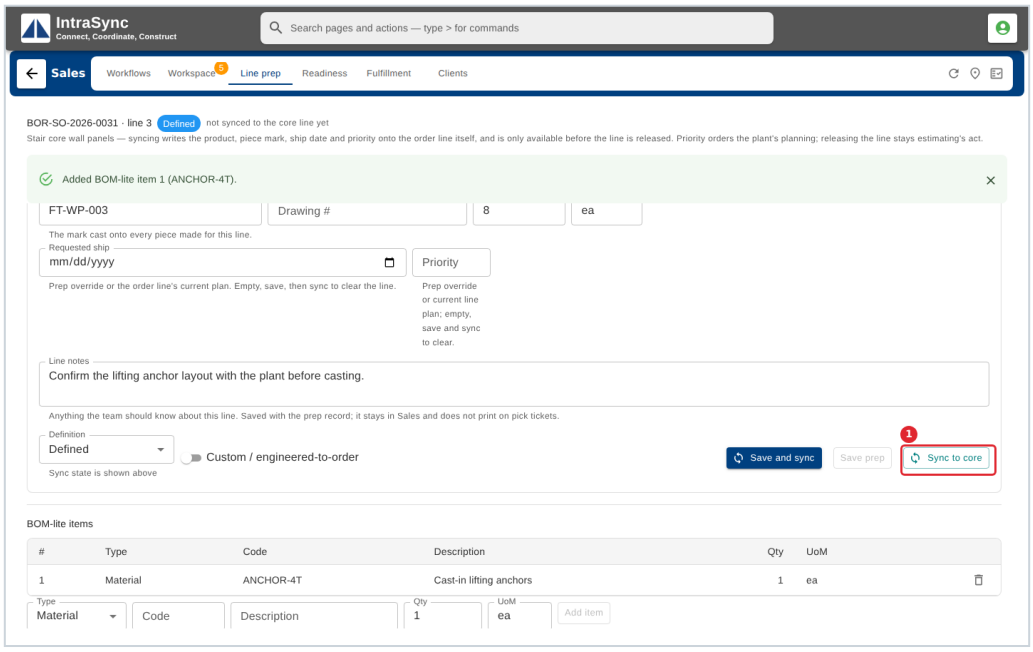
This is shown in the Sales video at 0:31.

7. Sync a prepped line to the production order

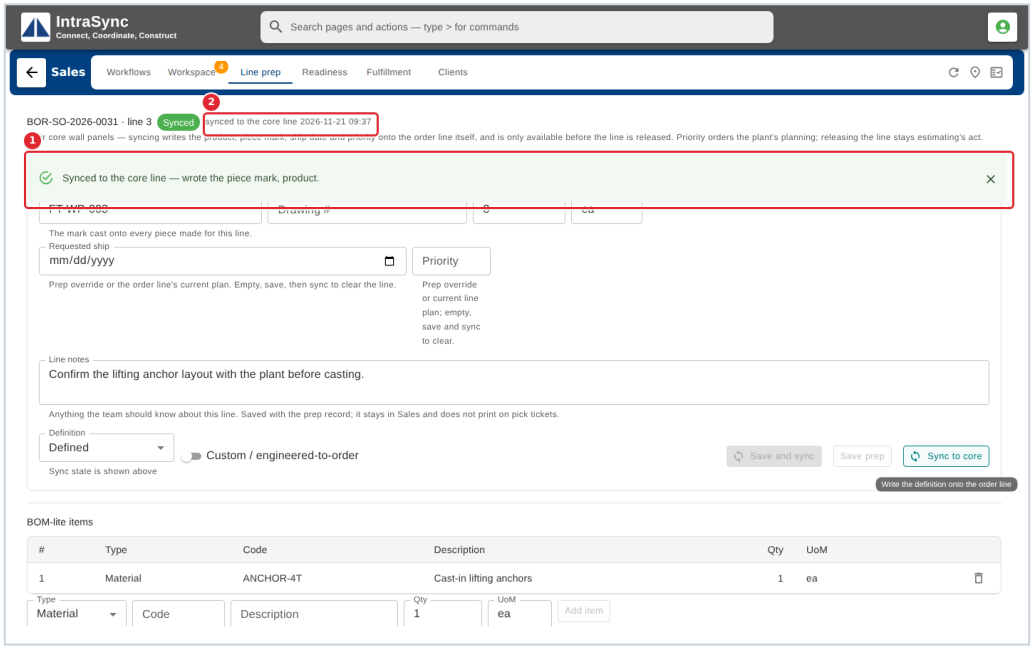
Write the line's product, piece mark, requested ship date and priority onto the production order line, where the plant's planning reads them.

Before you start:

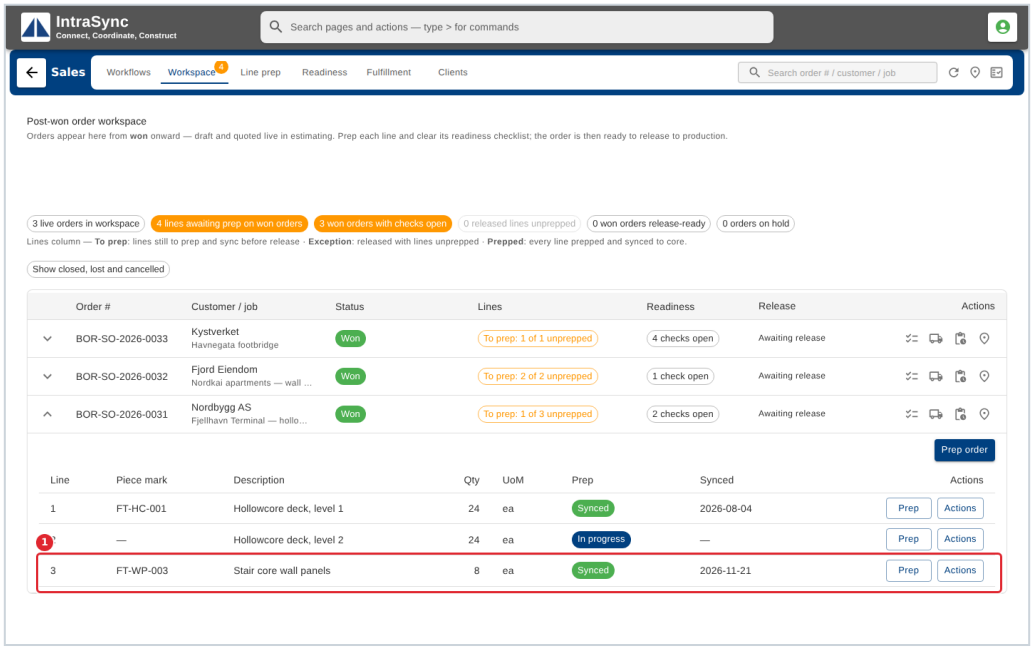
– The line has a saved prep record.



Step 1. Select Sync to core to write the product and piece mark onto the production order line.



Step 2. The confirmation names what was written, and the panel now reads synced.



Step 3. Back on Workspace, the line already shows Synced. No refresh is needed.

Tips:

– Syncing never changes an order's status or its prices. It only fills in the line's product, piece mark, requested ship date and priority.

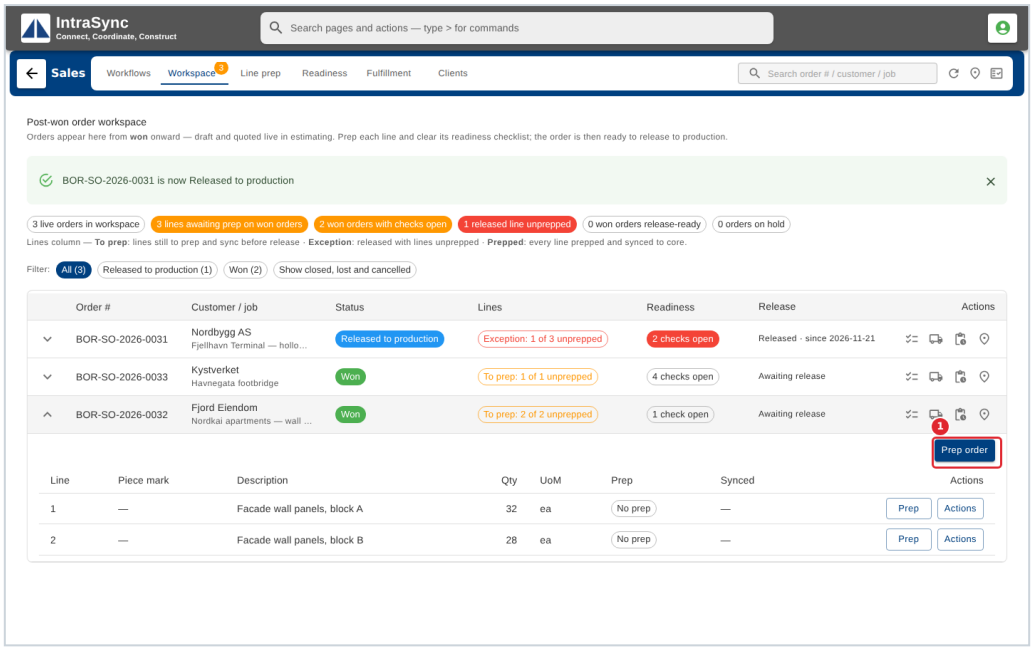
This is shown in the Sales video at 0:39.

8. Prep every line of an order in one pass

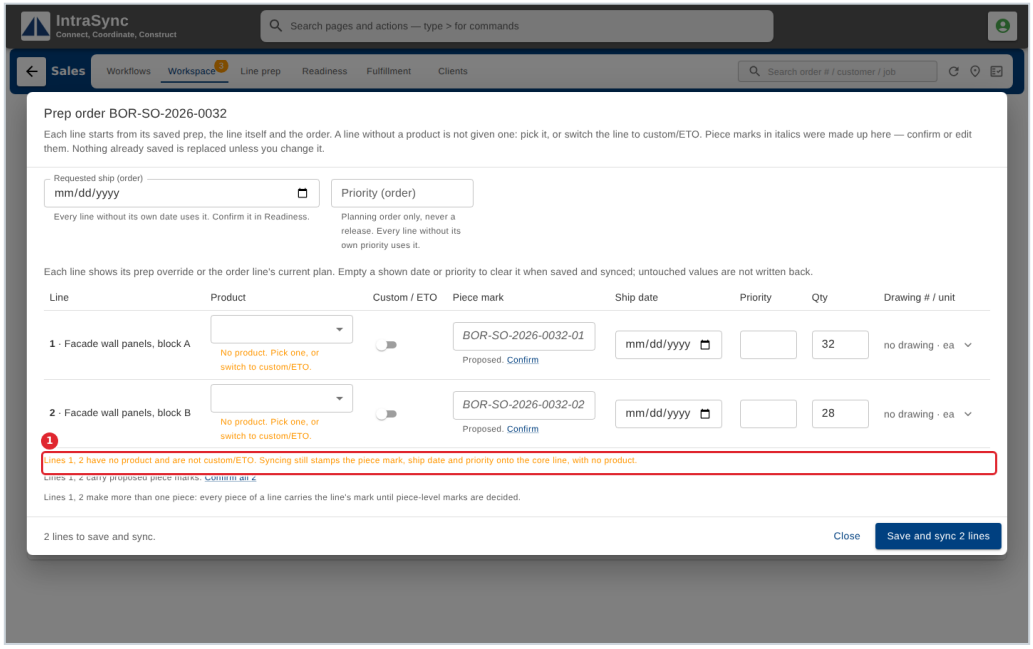
For an order with several unprepped lines, save and sync them all at once instead of one by one.

Before you start:

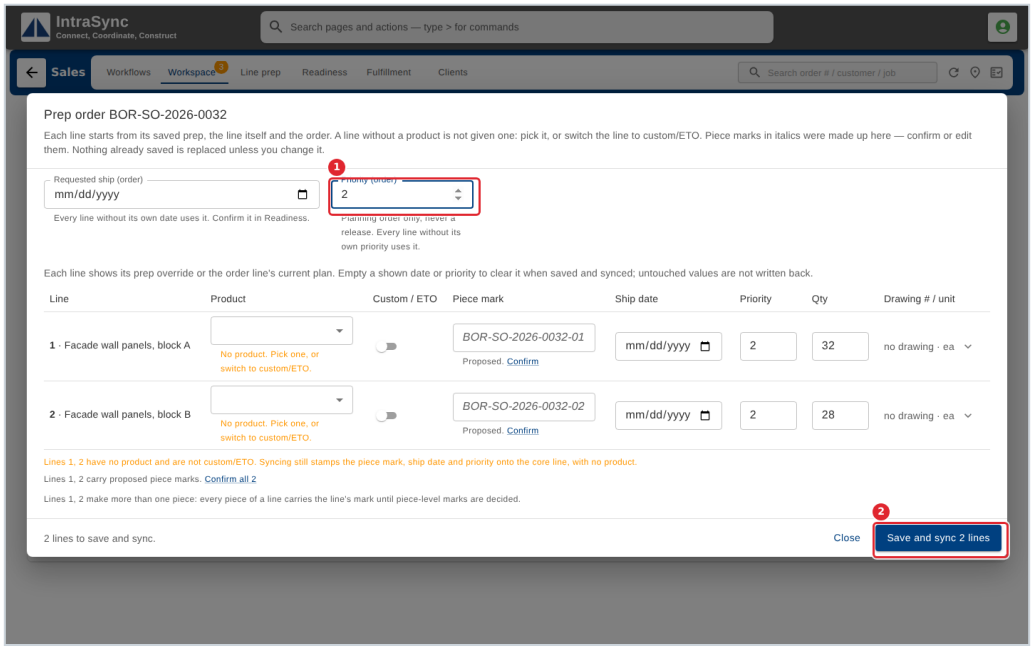
– The order is won and has lines without prep.



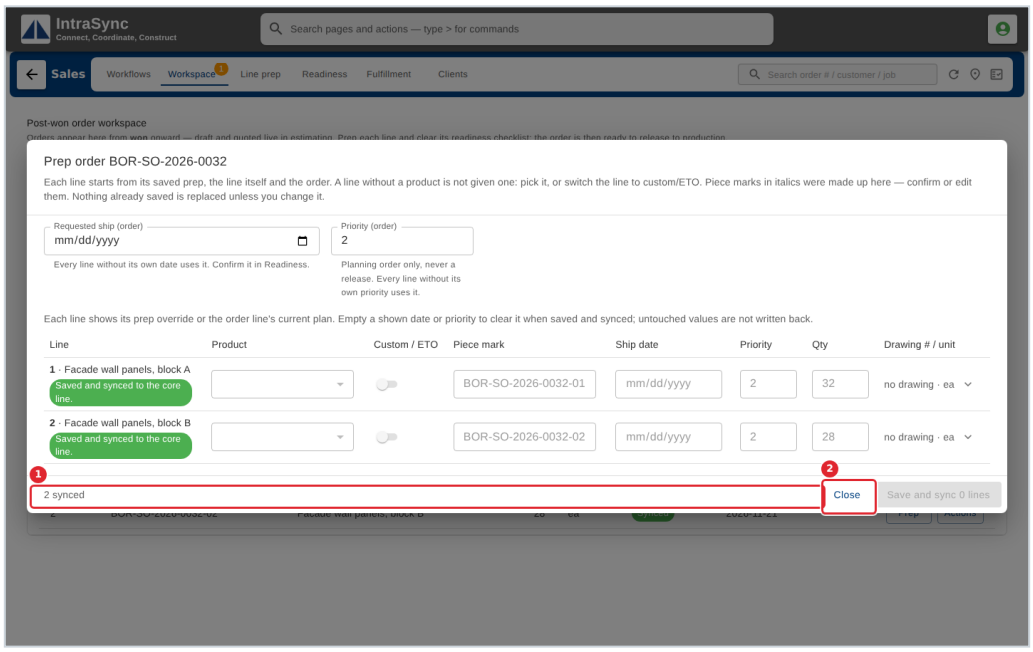
Step 1. To prep every line of an order at once, expand the order and select Prep order.



Step 2. Every line is listed with a proposed piece mark. A line with no product is flagged: pick one, or switch the line to custom or engineered-to-order.



Step 3. Set an order-level priority or ship date to fill every line that has none, then select Save and sync.



Step 4. Each line reports its result. Select Close when you are done.

Tips:

- Proposed piece marks are shown in italics. Confirm them, or type your own, before you save.
- A line with no product is still saved and synced, with a warning. Pick a product first if production needs one.
- The order-level priority is for planning only. It never releases anything.
- A ship date or priority you cleared on a line stays cleared. The order-level values only fill lines that never had one of their own.

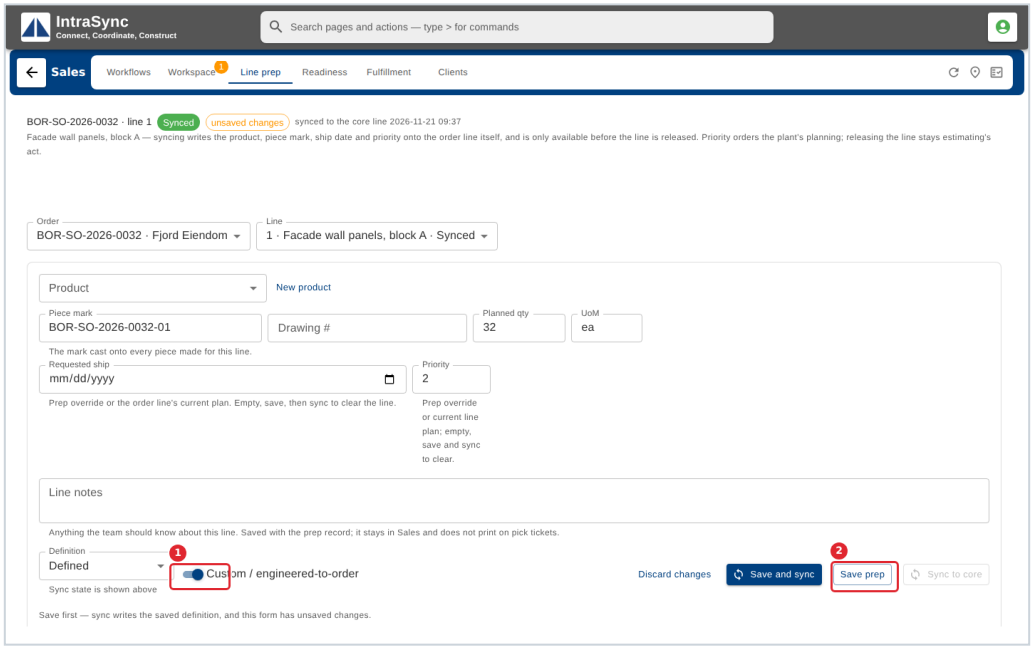
This is shown in the Sales video at 2:12.

9. Sign off a custom item

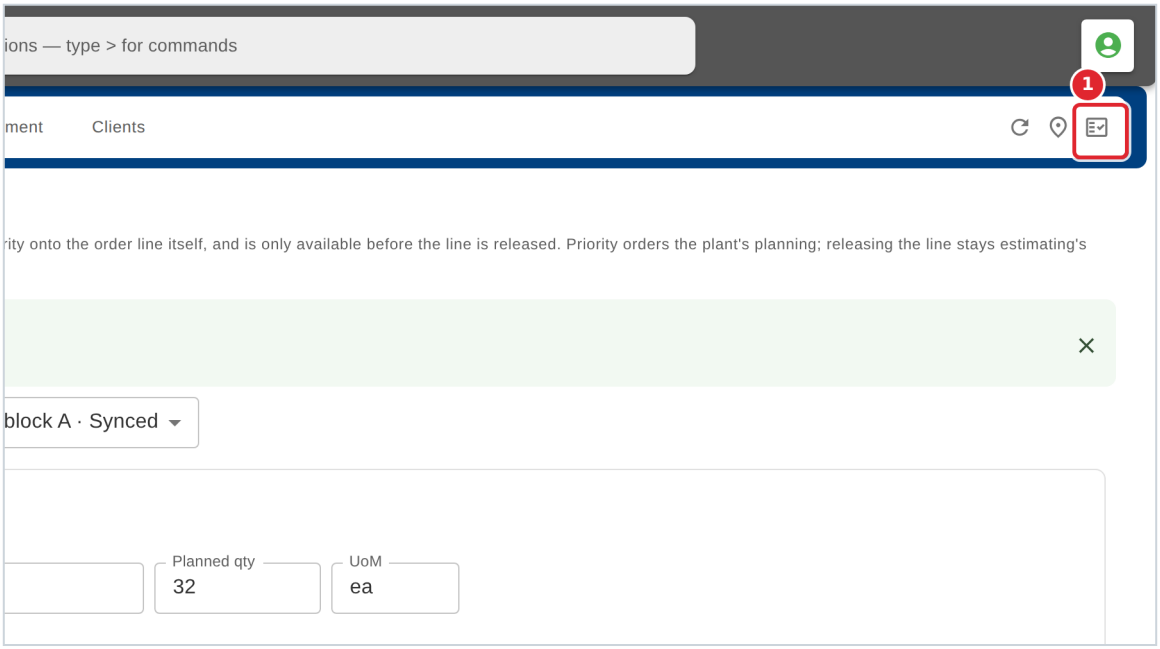
A custom or engineered-to-order line waits on a chain of sign-offs, such as the drawing approval and the salesperson's check, before it is approved for production. See where each item is waiting, and sign the steps that are yours.

Before you start:

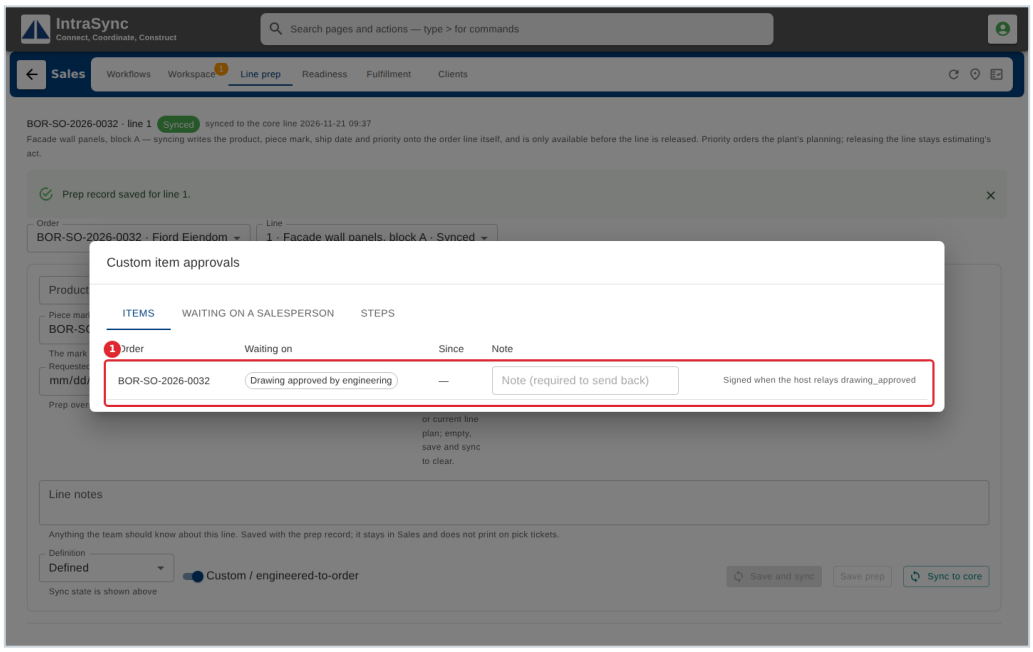
- Your system has approval chains switched on. Otherwise the Custom item approvals button is not shown.
- The line is marked Custom / engineered-to-order in Line prep.



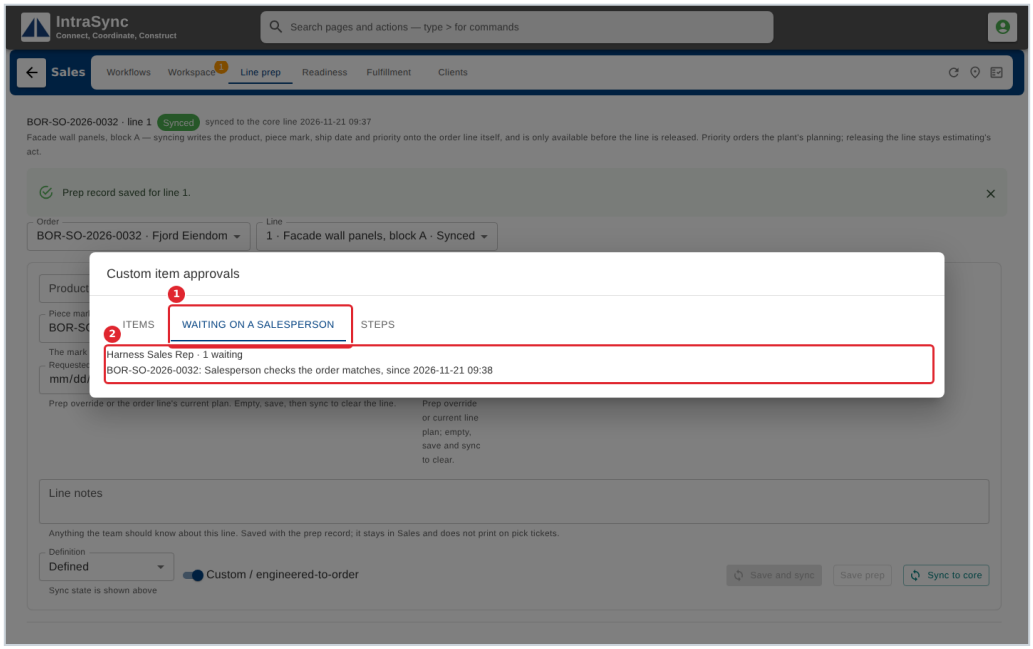
Step 1. To make a line a custom item, open it in Line prep, switch on Custom / engineered-to-order, and select Save prep.



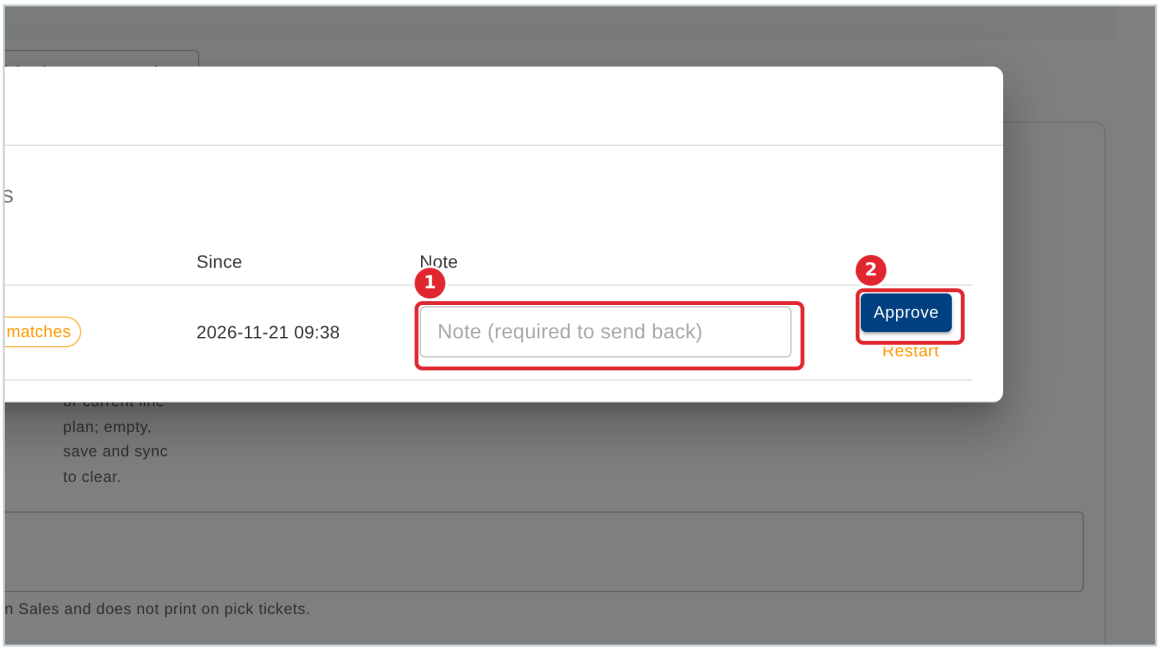
Step 2. Select Custom item approvals at the top right of the hub.



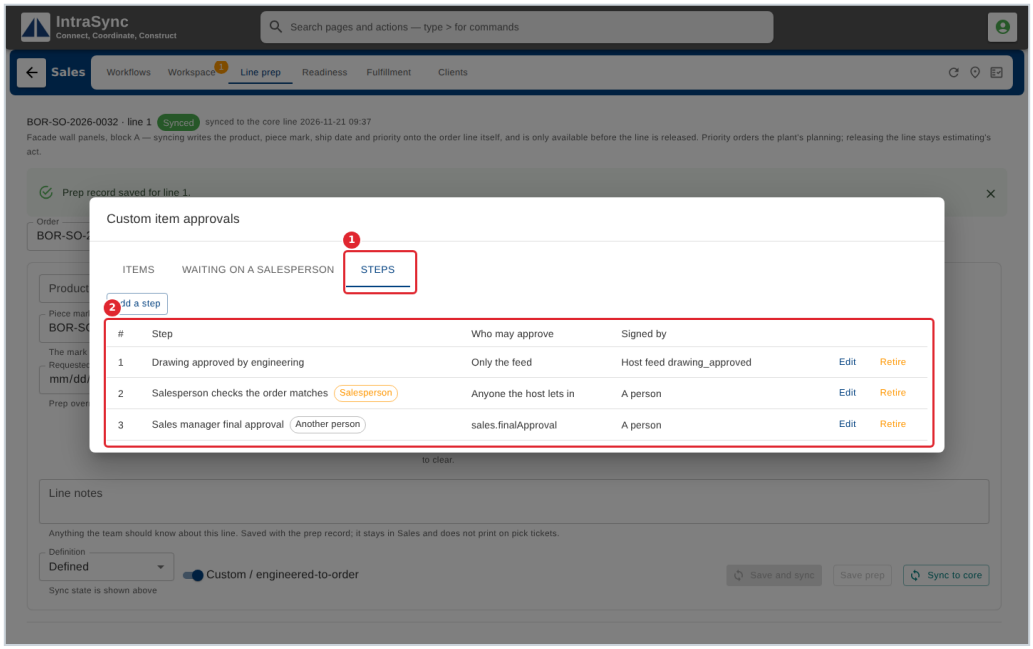
Step 3. Items lists every custom item, the step it is waiting on and since when. A step signed by a host feed, such as engineering's drawing approval, has no Approve button: it is signed when the host relays it.



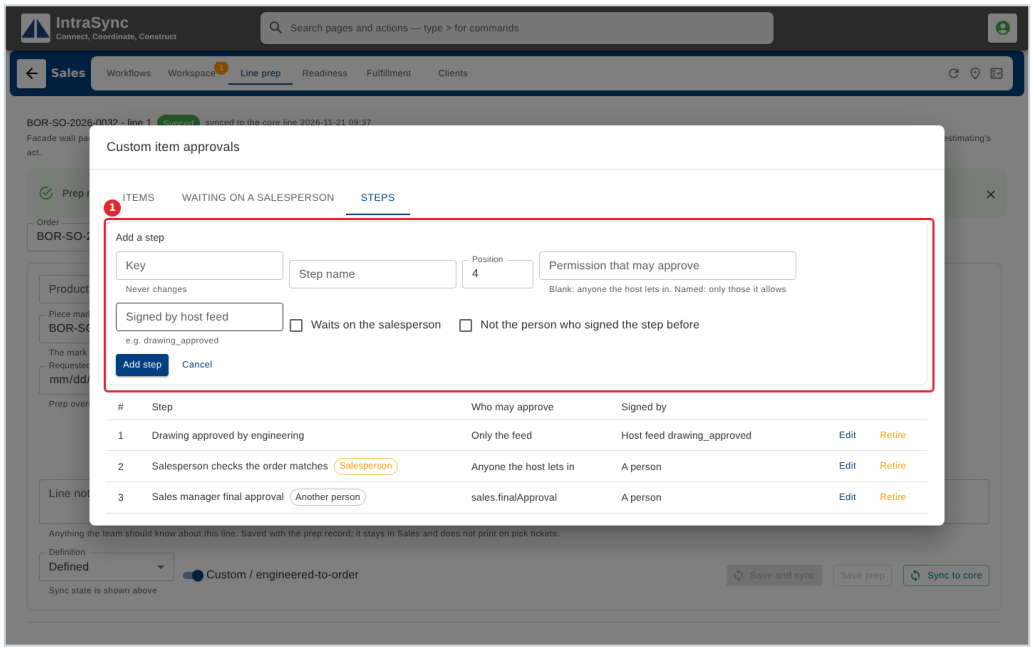
Step 4. Select Waiting on a salesperson to see the items each salesperson still has to check, grouped by salesperson.



Step 5. On Items, when the waiting step is yours to sign, select Approve on the item's row. To send an item back, type a note and select Send back.



Step 6. Select Steps to see your company's approval chain: each step in order, who may approve it, and whether a person or a host feed signs it.



Step 7. To add a step, select Add a step, fill in the form, and select Add step. To change a step, select Edit on its row; to take it out of the chain, select Retire.

Tips:

- Each step is signed only by the people it allows. A salesperson's check is signed by the order's own salesperson. If anyone else selects Approve, the approval is refused and the item's row says why.
- Send back needs a note saying why. It is offered once the first step is signed, and never sends an item back onto a step that a host feed signs.
- Restart sends an item back to the first step, for example when a new drawing replaces the old one. It asks you to confirm first.
- A new step needs a key, a name and a position. The key uses lower-case letters, digits and underscores, starts with a letter, and never changes once the step is added. The position is a whole number.
- A retired step stays in the list, greyed out, and Restore puts it back in the chain.
- If you are not allowed to change the approval chain, saving a step is refused and the reason is shown.
- The approvals screen has no Close button. Press Esc, or select anywhere outside it, to close it.

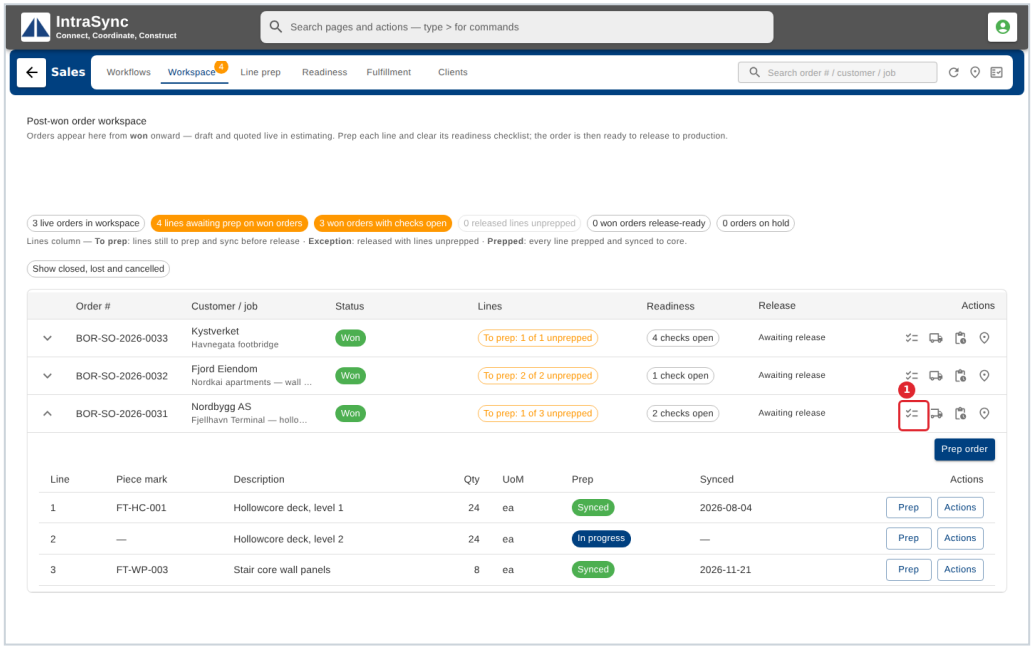
This is shown in the Sales video at 3:04.

10. Work through an order's readiness checklist

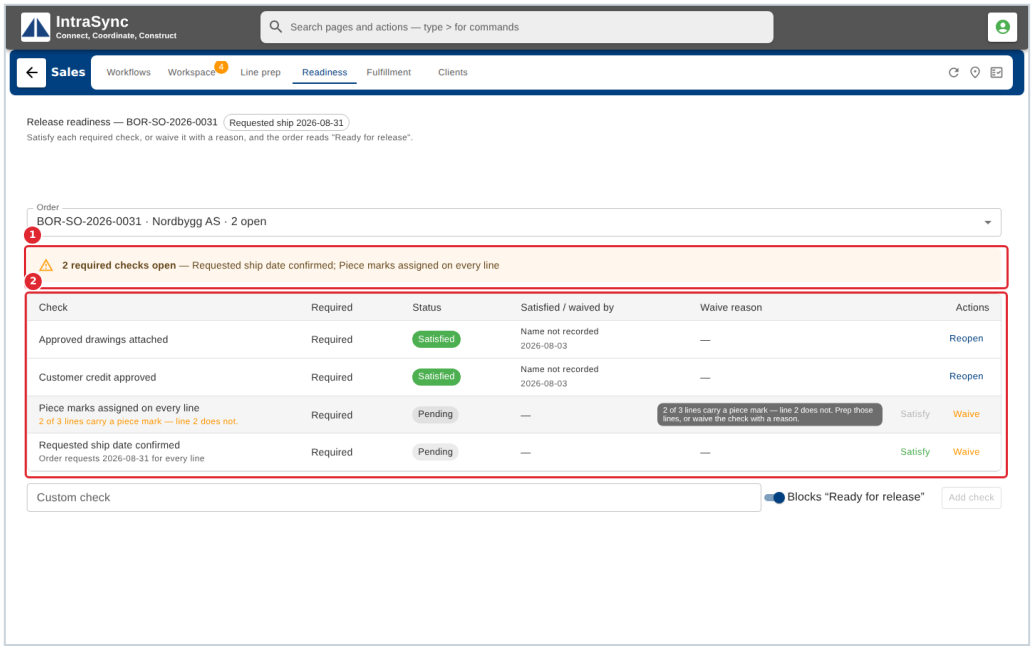
Confirm an order is ready before it is released to production: drawings, credit, piece marks, ship date and anything else your plant checks.

Before you start:

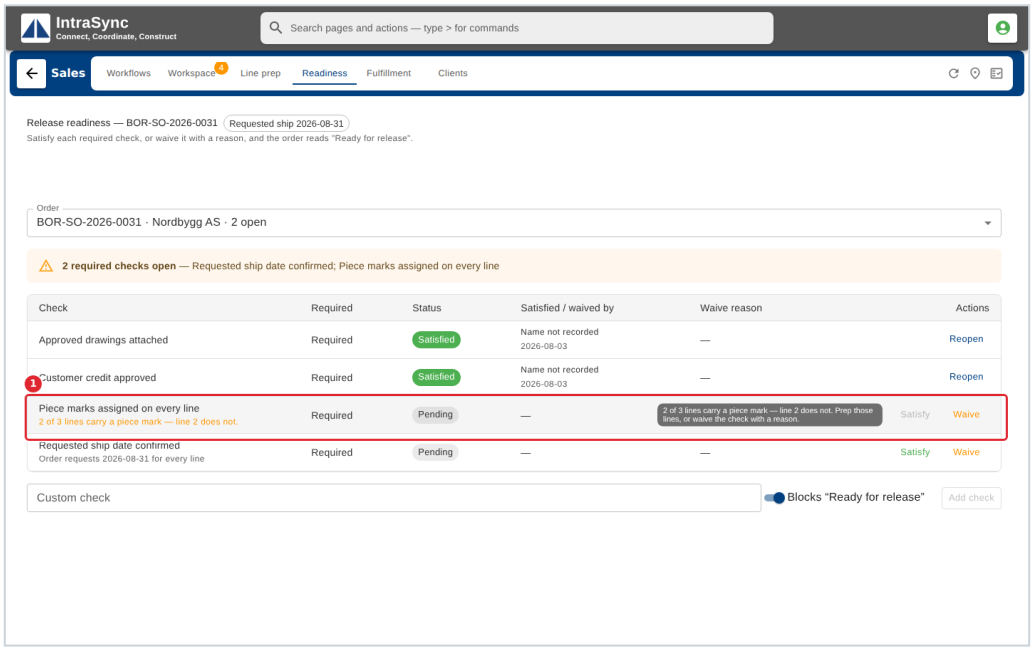
- The order is won.



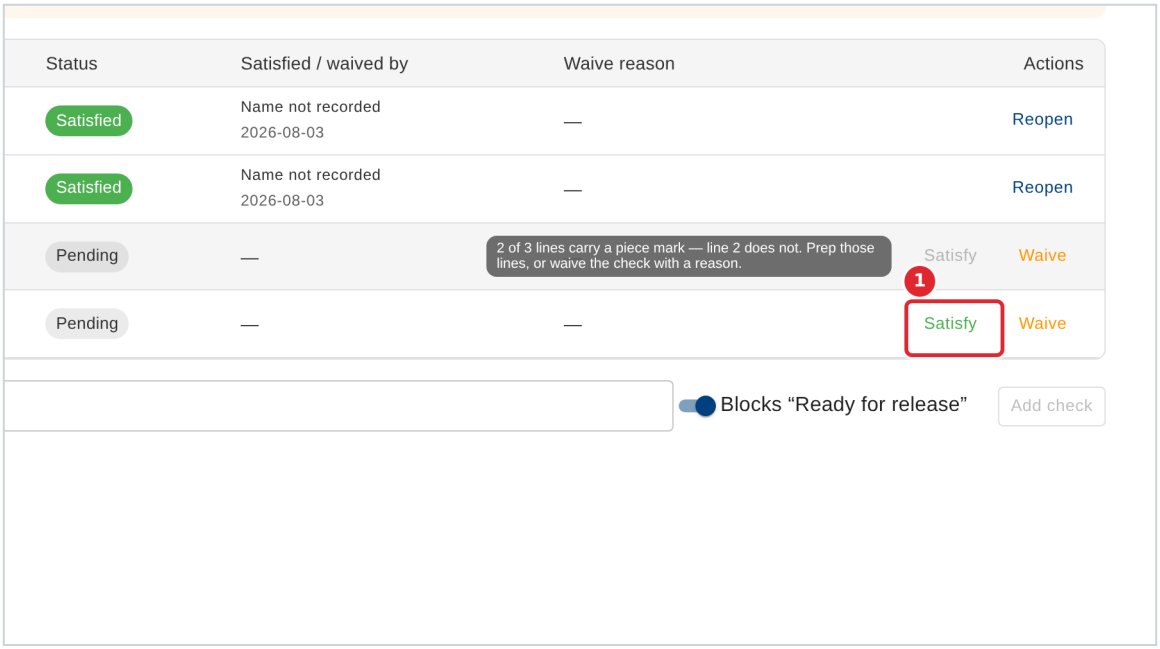
Step 1. On the order's row, select Readiness.



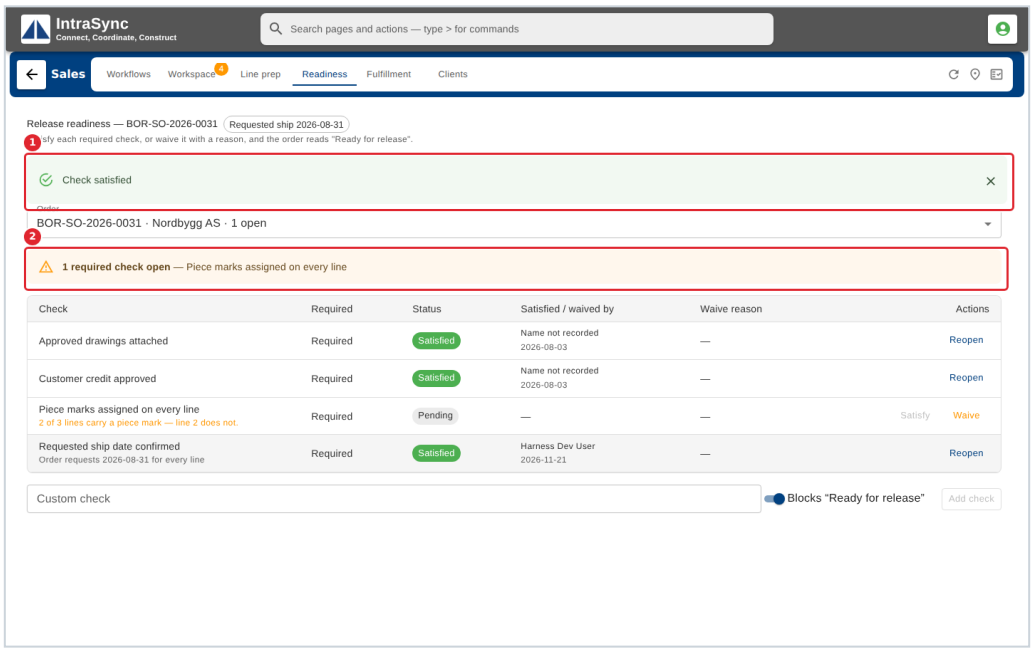
Step 2. The banner says how many required checks are still open. The list shows each check, and who satisfied it and when.



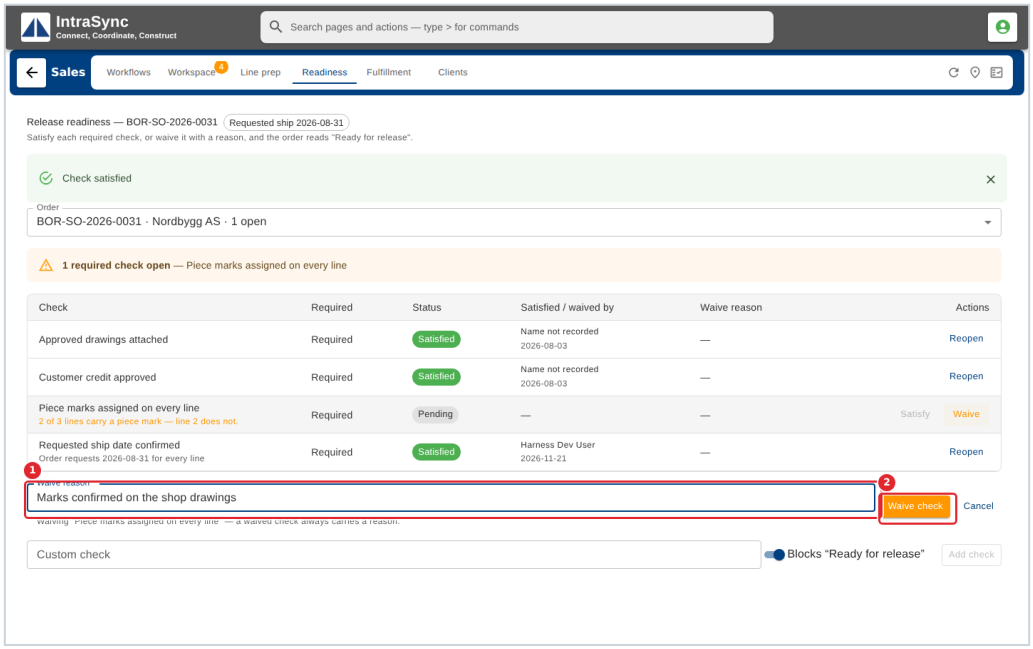
Step 3. A check the module measures cannot be satisfied by hand while it is false. Its evidence is shown under it.



Step 4. For a check that needs a person's judgement, select Satisfy.



Step 5. The check is recorded as satisfied, and the banner updates.



Step 6. To accept a check without satisfying it, select Waive, enter a reason, and select Waive check. A waived check always keeps its reason.

Tips:

- The checklist is advice, not a lock. Releasing with open checks is allowed, and the order then shows those checks as exceptions to follow up.
- Reopen puts a satisfied or waived check back to open.
- A waived check always keeps its reason, so the next person can see why it was accepted.

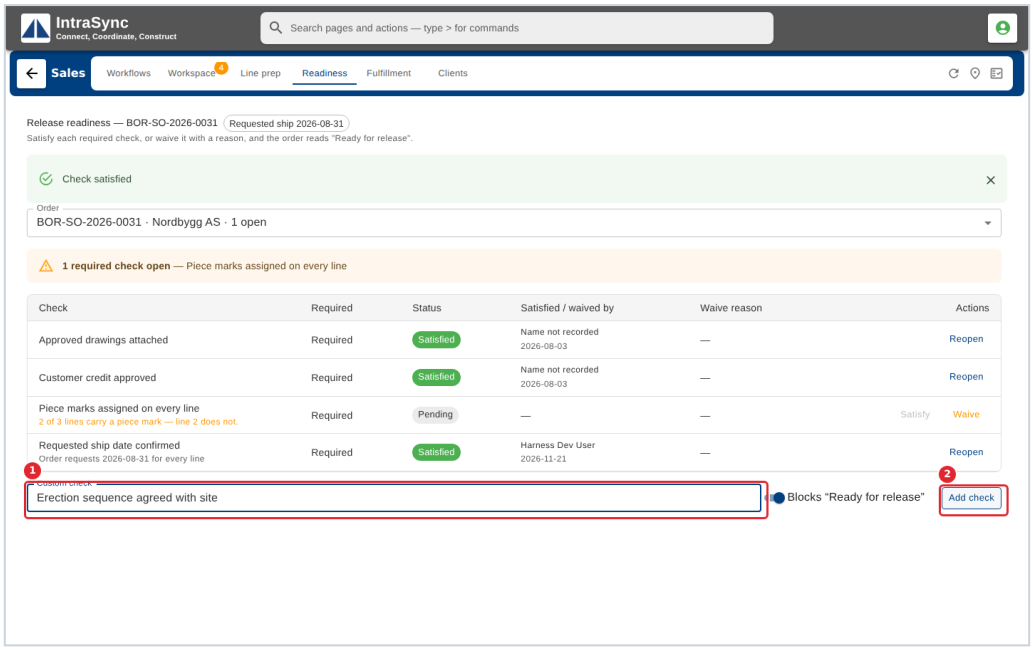
This is shown in the Sales video at 0:54.

11. Add your own readiness check

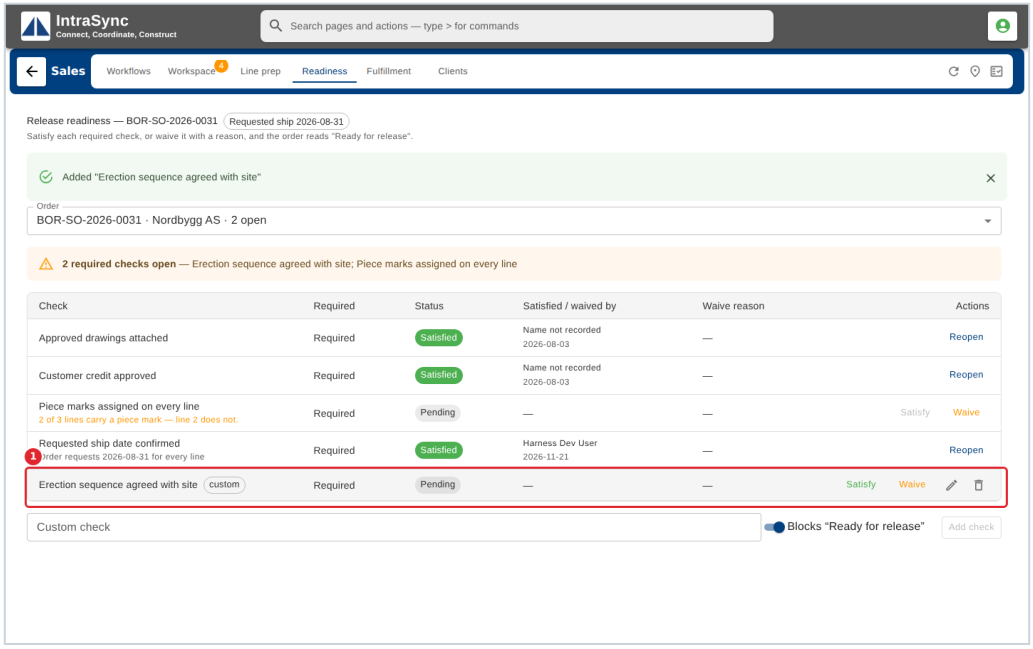
Track something your plant needs before release that the standard checklist does not cover.

Before you start:

– The order is open on the Readiness tab.



Step 1. To add a check of your own, type it under the list and select Add check.



Step 2. Your check is added at the end, marked custom. Use its edit and remove buttons to change or delete it.

Tips:

- Turn off Blocks "Ready for release" before adding a check that should be tracked but should not hold the order back.
- Only your own checks can be removed. The standard checks are the same for every order.

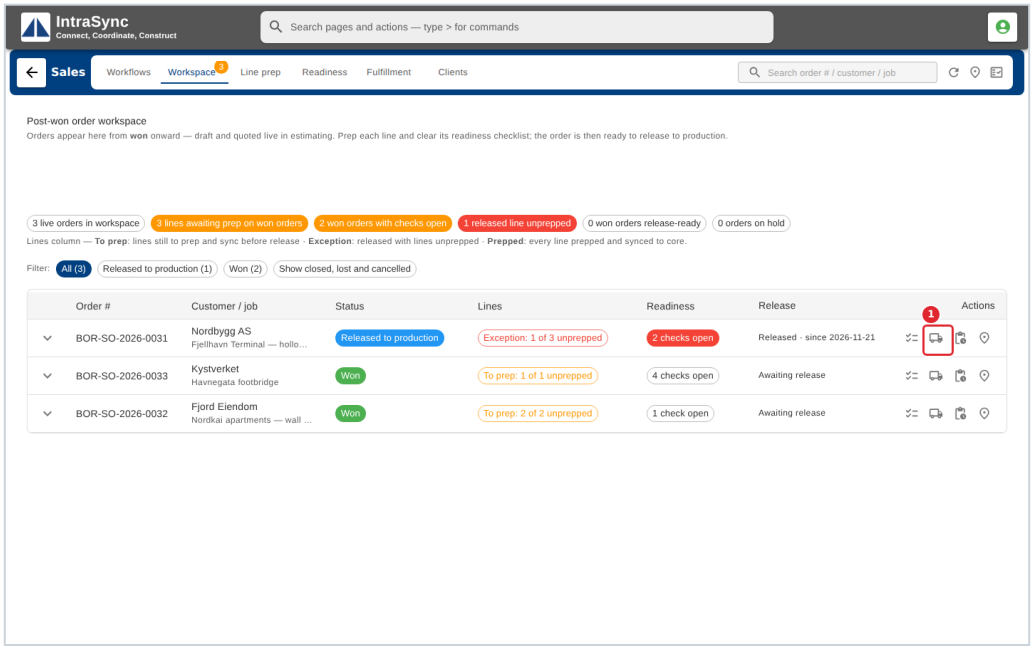
This is shown in the Sales video at 1:11.

12. Track what production has made against an order

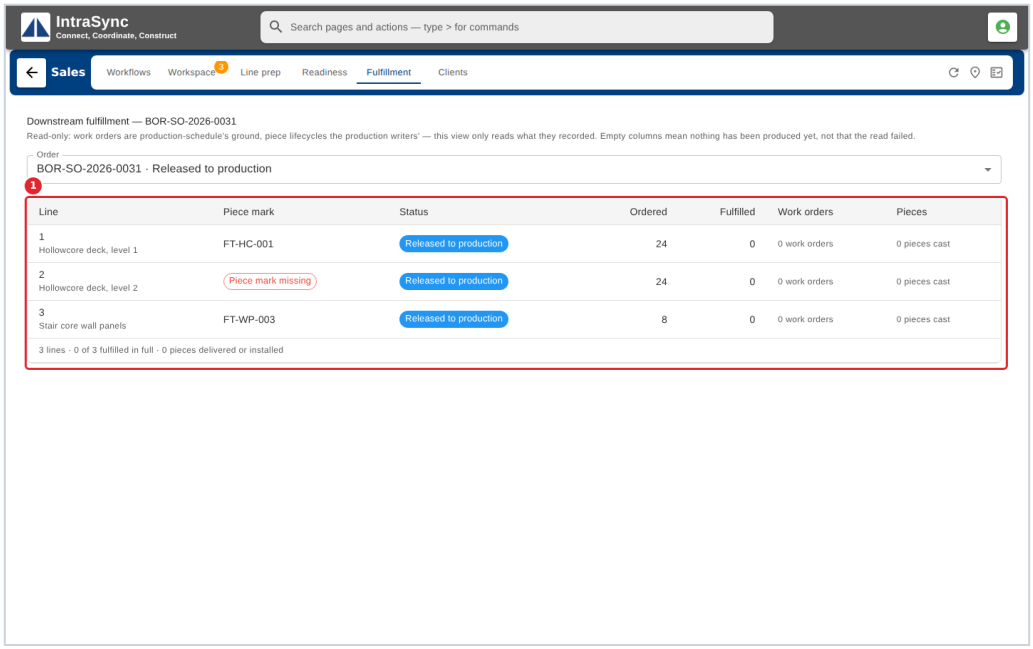
Answer "where is my order?" once it has been released: what was ordered, what is fulfilled, and what has been cast.

Before you start:

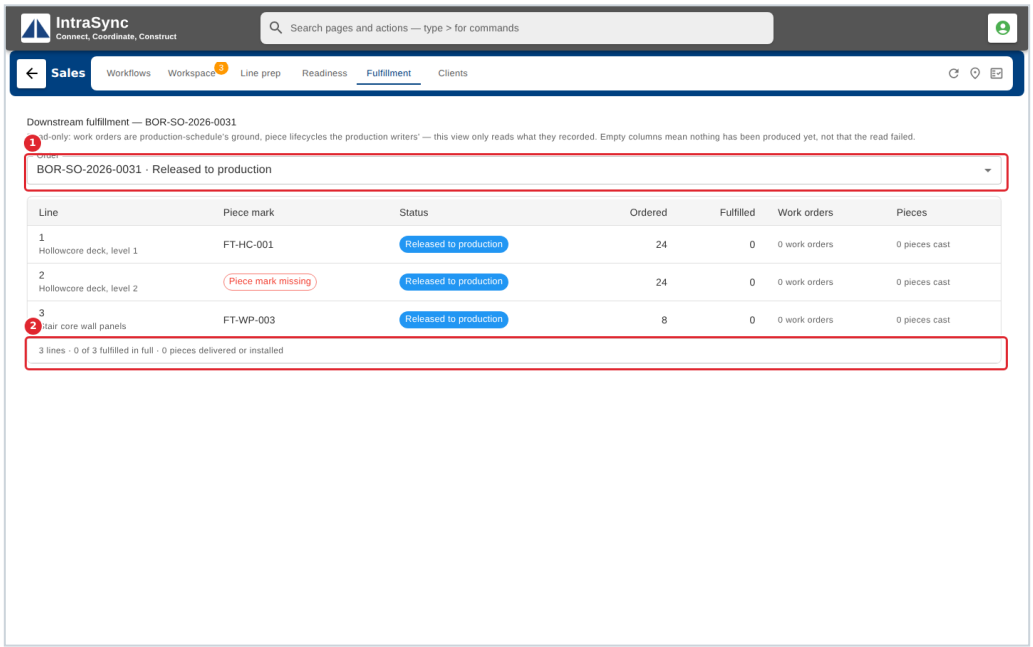
- The order has been released to production. Release is done in Estimating, not in Sales.



Step 1. Once an order is released to production, select Fulfillment on its row.



Step 2. Each line shows what was ordered, what has been fulfilled, and the work orders and pieces cast against it.



Step 3. Use the order picker to look at another order, and the totals row for the whole order.

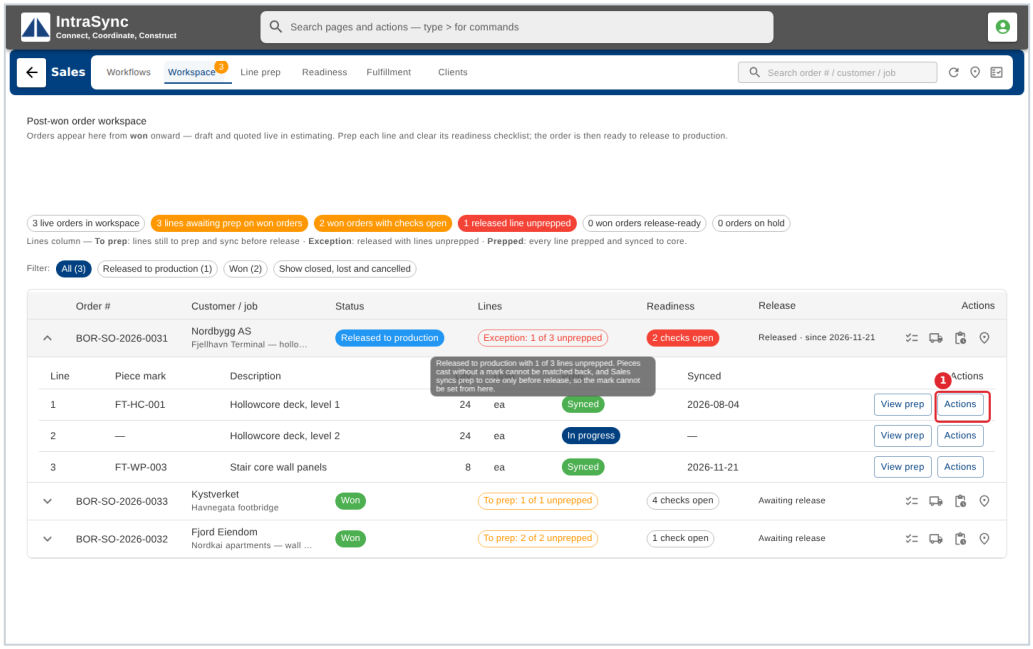
Tips:

– A line released without a piece mark is flagged here, because nothing cast for it can be matched back to the line.

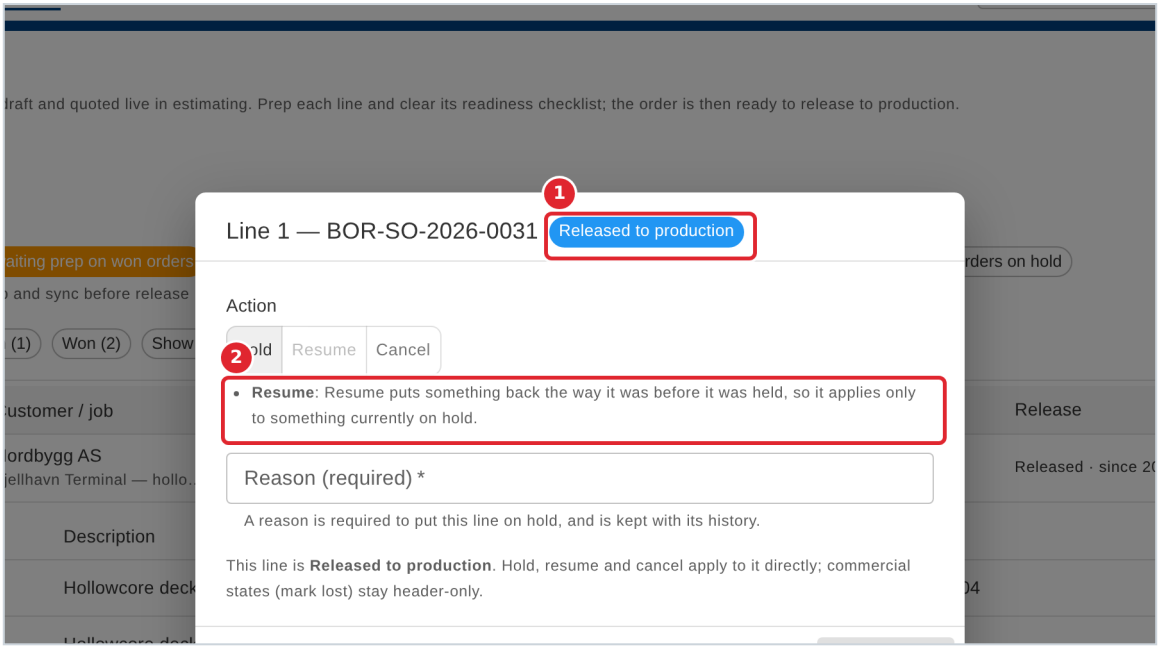
This is shown in the Sales video at 1:30.

13. Check what you can do with one line

See a single line's current status and which actions it allows before you try one.



Step 1. To see what you can do with one line, select Actions on that line.



Step 2. The dialog shows the line's current status, and says which actions it does not allow, and why.

Tips:

– Mark lost is offered on a whole order only, never on a single line.

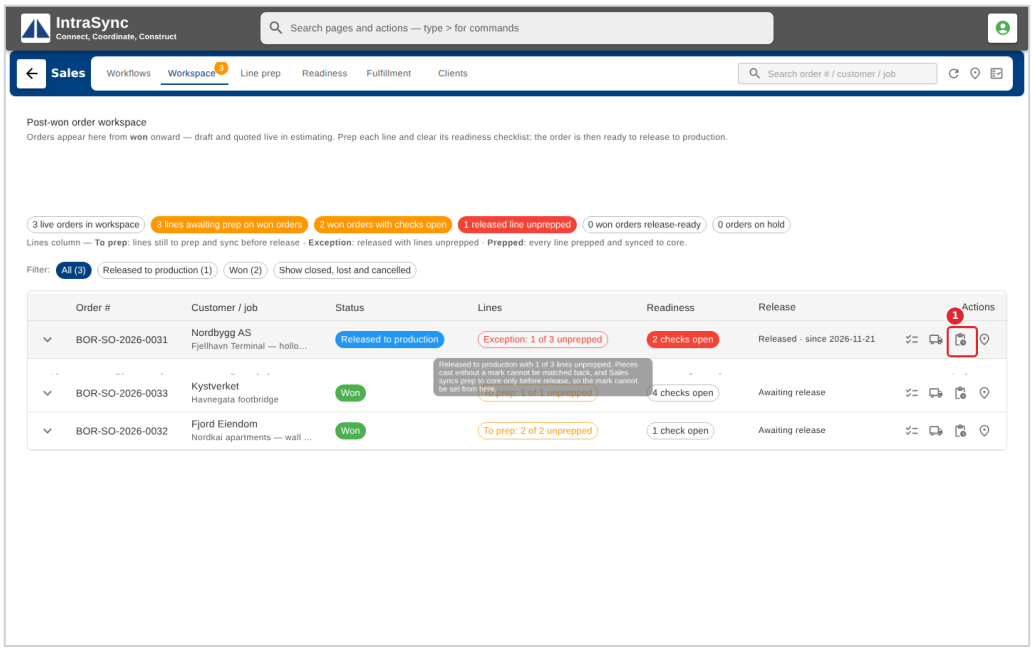
This is shown in the Sales video at 1:39.

14. Put an order on hold, and resume it

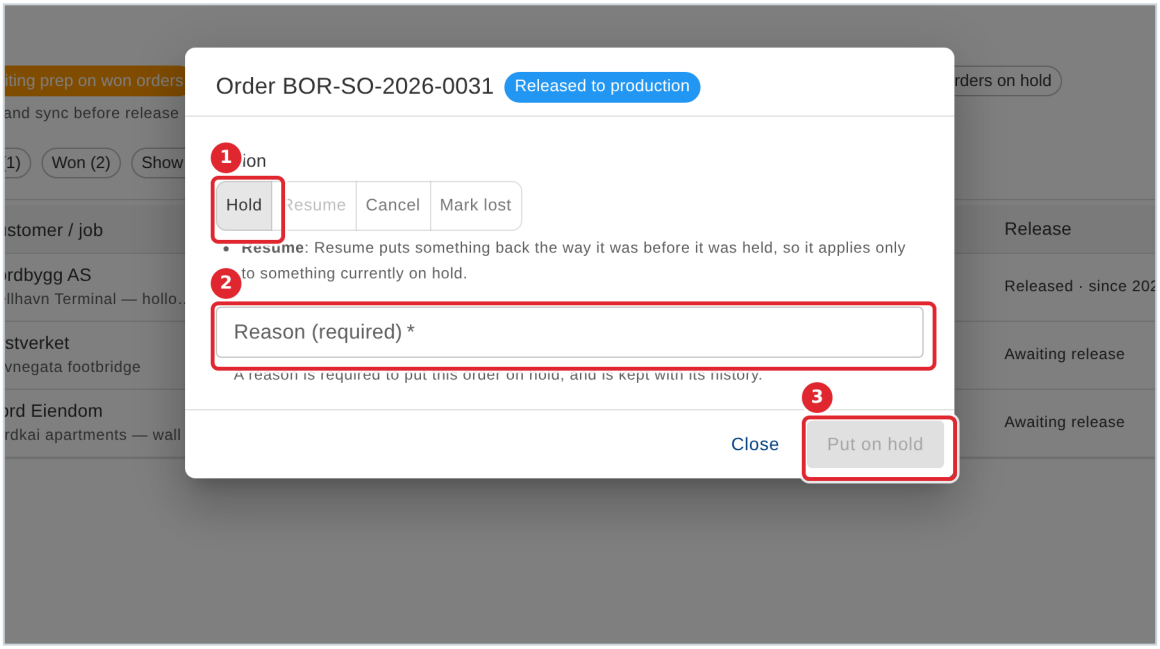
Pause an order, for example while a customer revises a schedule, and bring it back to exactly where it was.

Before you start:

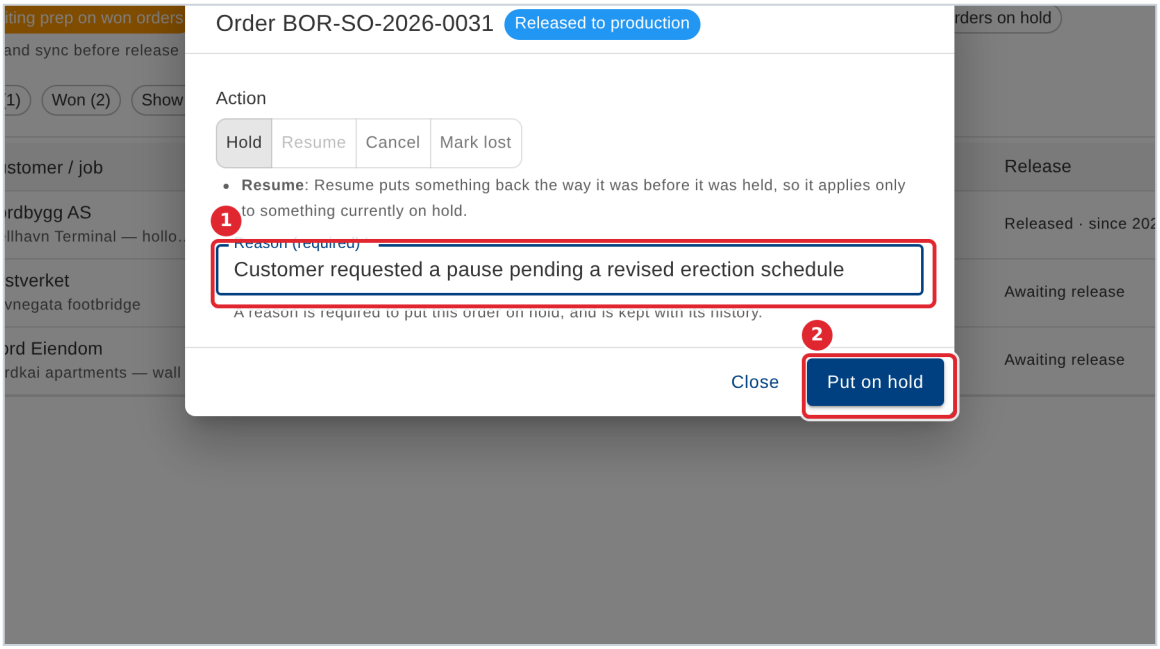
– You know why the order is being held: the reason is required and is kept with the order.



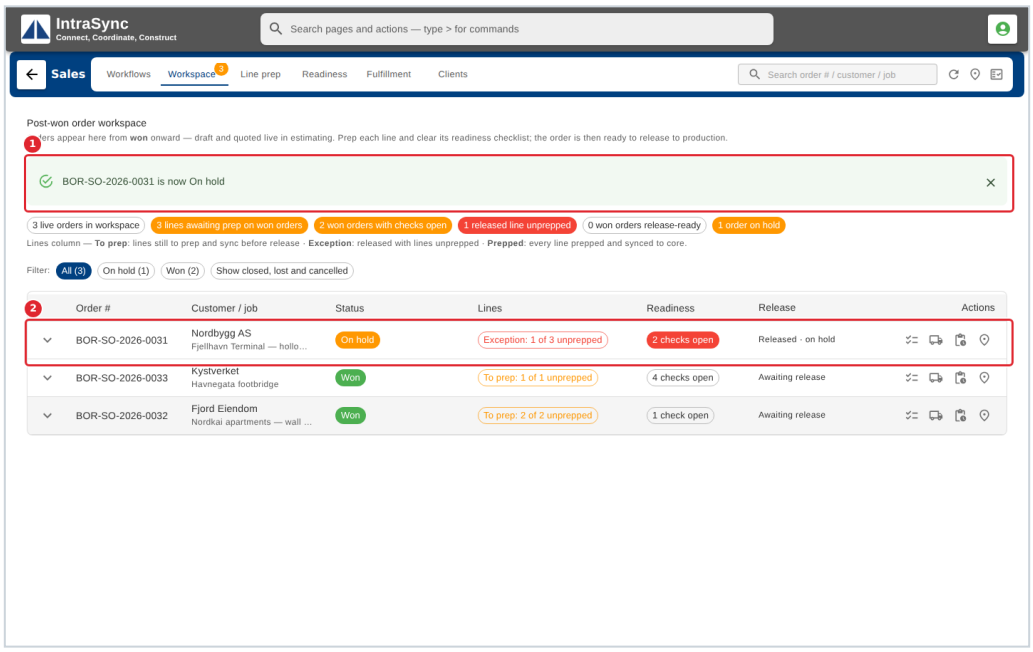
Step 1. To pause an order, select Actions on the order's row.



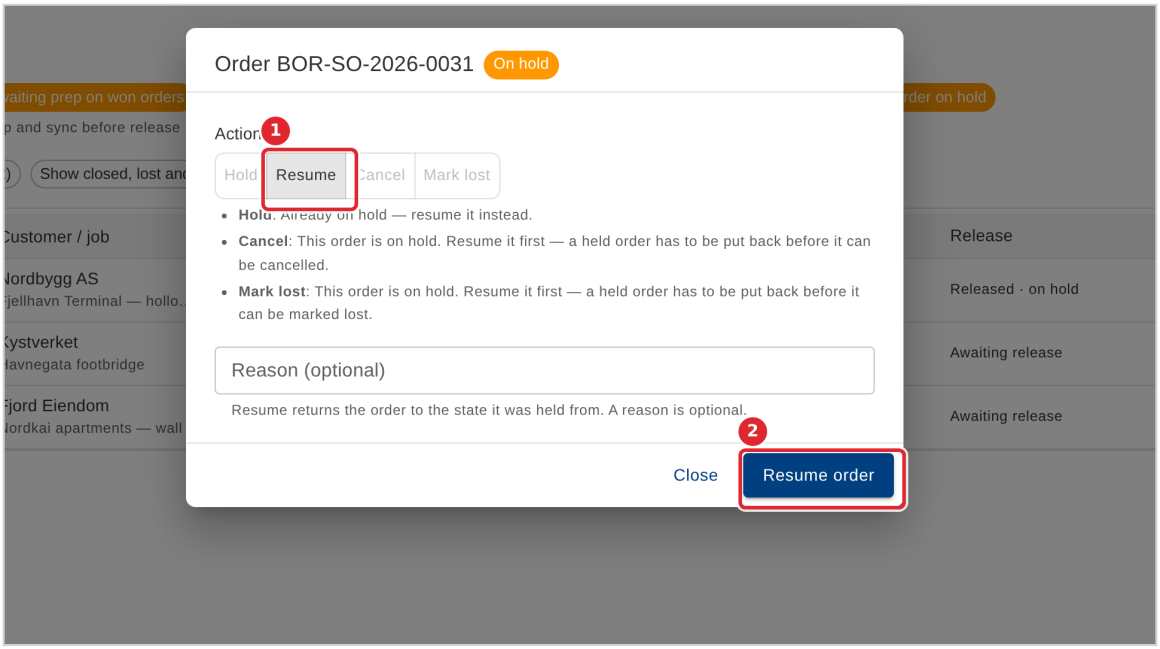
Step 2. Select Hold. The reason is required, and Put on hold stays off until you enter one.



Step 3. Enter the reason, then select Put on hold.



Step 4. The order shows On hold, and the banner names the order.



Step 5. To resume, open Actions again, select Resume, and select Resume order. The order returns to the state it was held from.

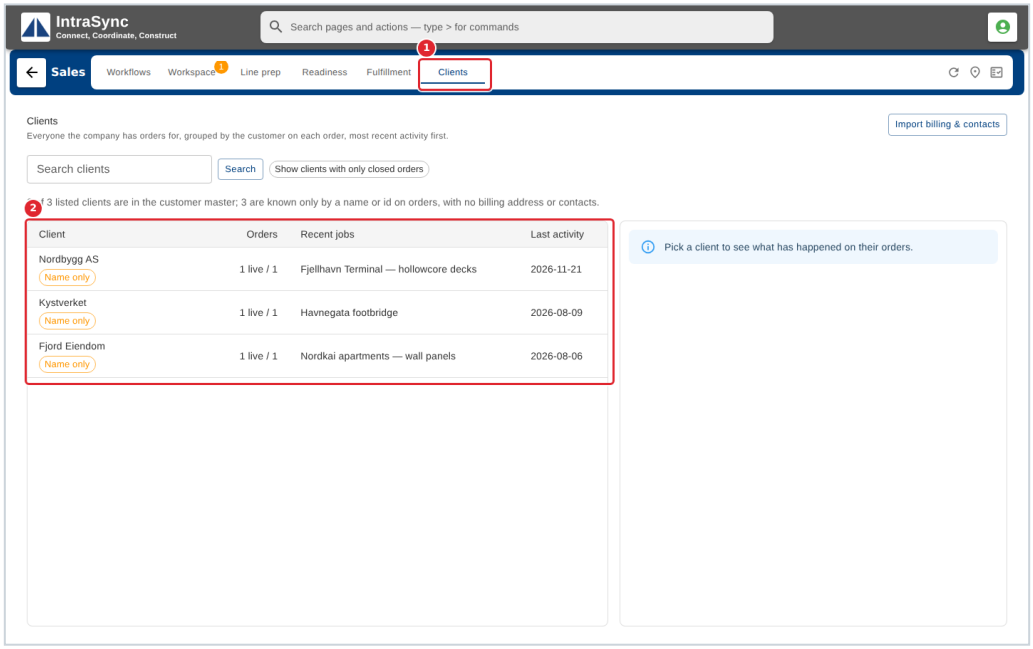
Tips:

- The same dialog cancels an order or marks it lost. On an order already released, a cancellation is recorded as cancelled, and the dialog says so before you confirm.
- Opening the actions dialog clears the previous confirmation banner, so the banner always describes the latest change.

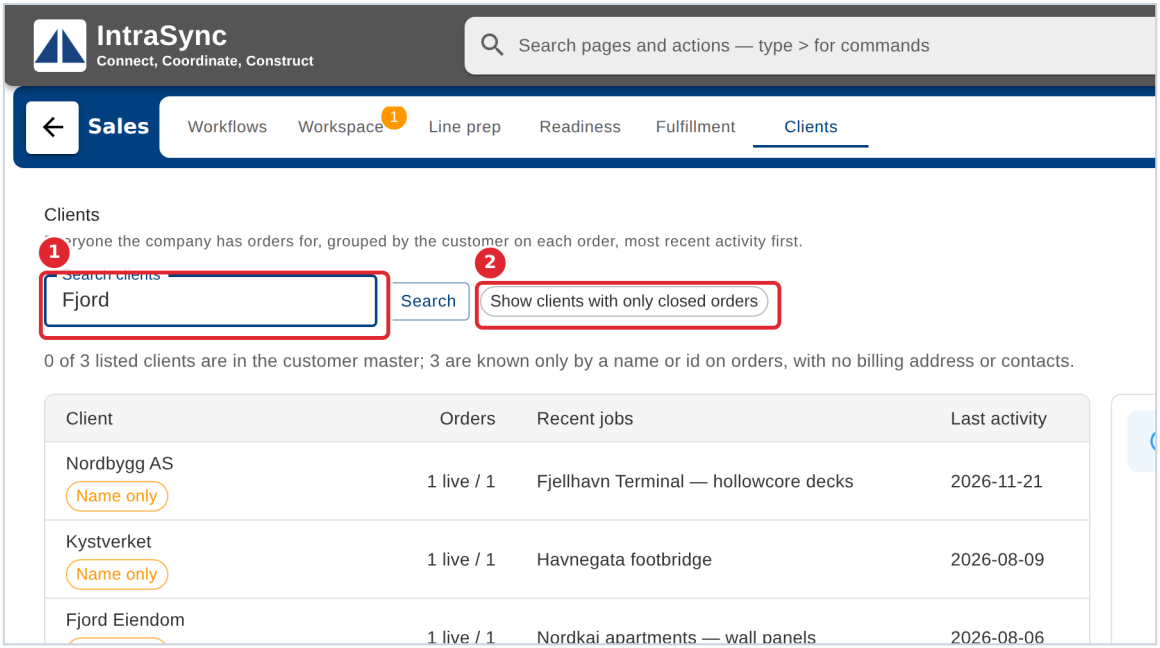
This is shown in the Sales video at 1:48.

15. Look up a client and their orders

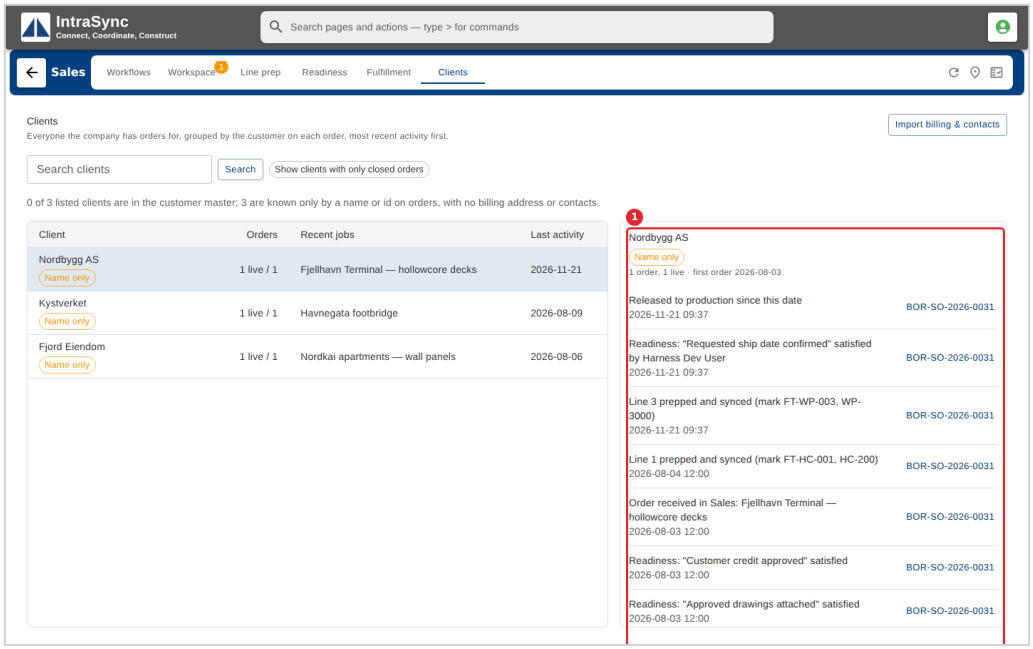
See every order a client has with you, and open any of them in the Workspace.



Step 1. Select Clients. Every client with an order is listed.



Step 2. Search by name, customer id or job. Show clients with only closed orders adds those too.



Step 3. Select a client to see their order activity. Open an order to go straight to it in the Workspace.

Tips:

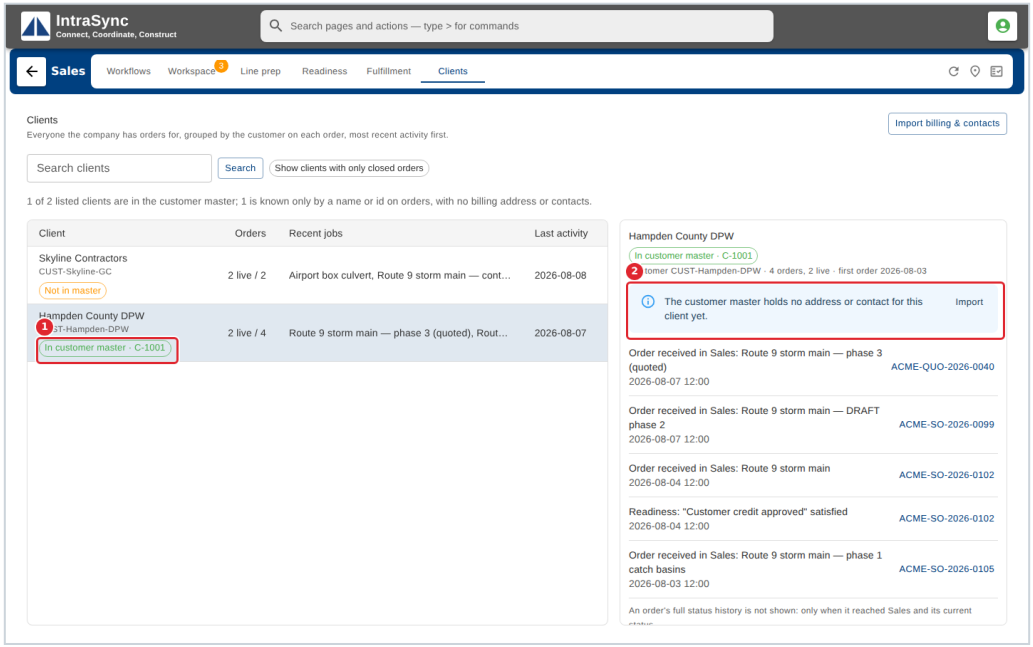
- A client appears here with their first order. Clients are listed from the orders, so there is no client to create on this tab.
- The label under a client says whether its orders point at a record in the customer master. Name only means the orders carry just a name, so there is no billing address or contact for that client. Point at the label to read what it means.

16. Fill in customer billing and contacts from QuickBooks or a spreadsheet

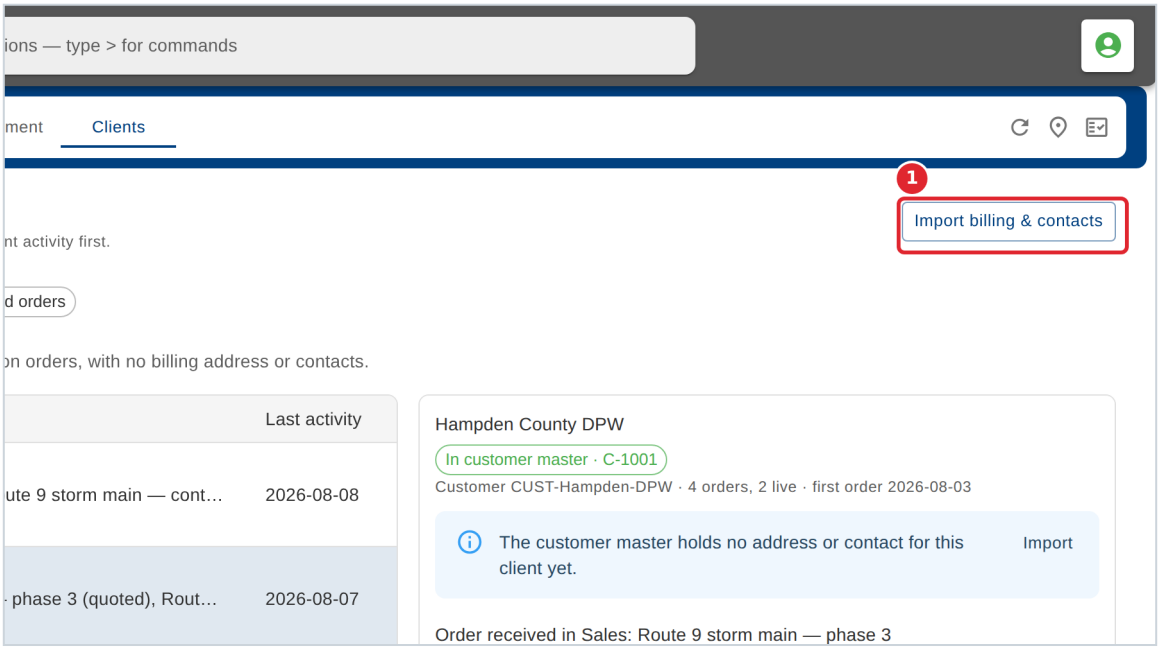
Bring the billing and shipping addresses, email, phone and contacts your company already keeps in QuickBooks or a spreadsheet into the customer master, so every order for that customer has them.

Before you start:

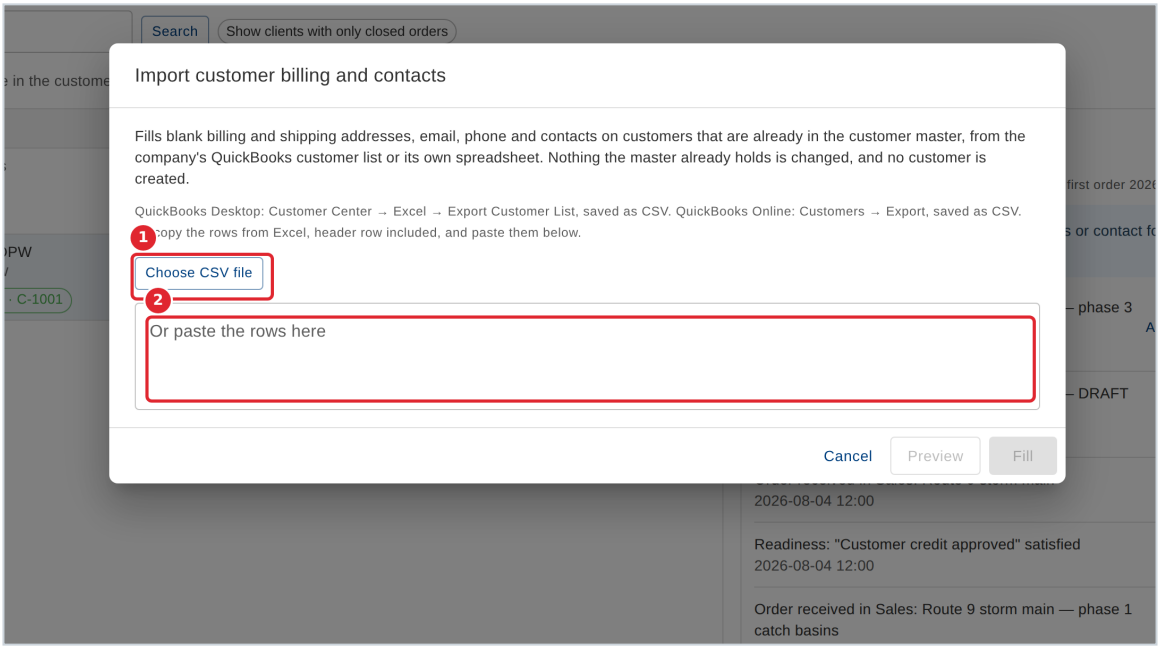
- Your system has the customer import switched on. Otherwise the Import billing & contacts button is not shown on Clients.
- The customers are already in the customer master. The import fills in blank details only. It creates no customer.
- Your customer list is saved as a CSV file, or open in Excel so you can copy its rows.



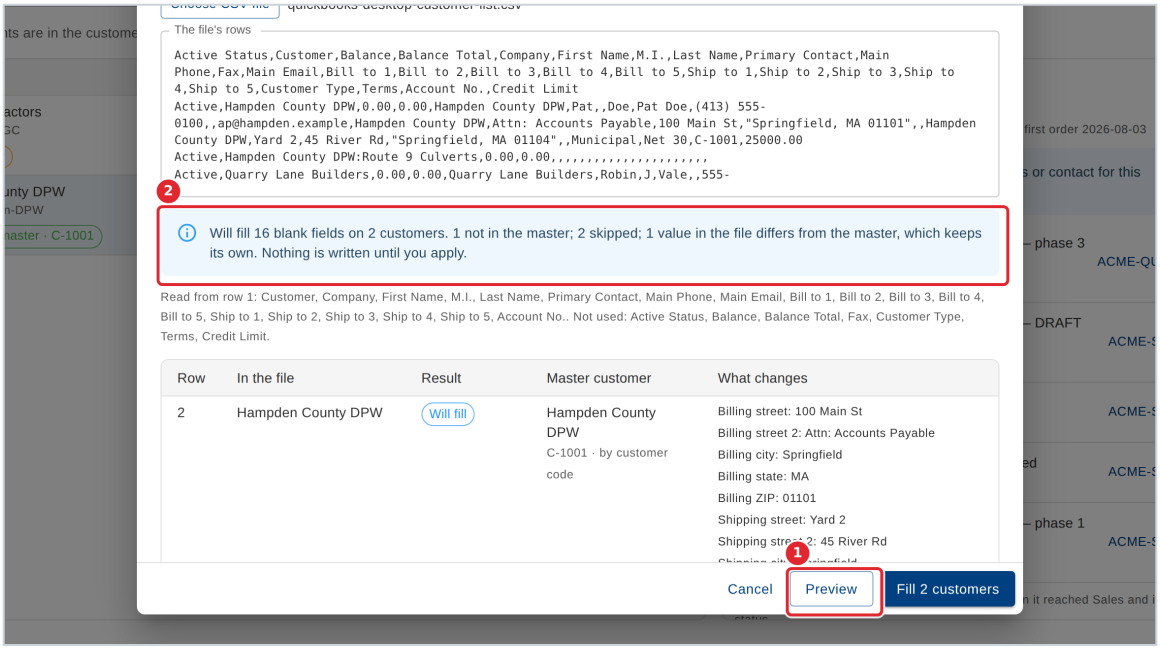
Step 1. Select Clients, then a client marked In customer master. Its billing address and contacts come from the customer master. Here they are still blank, and the note offers an Import shortcut.



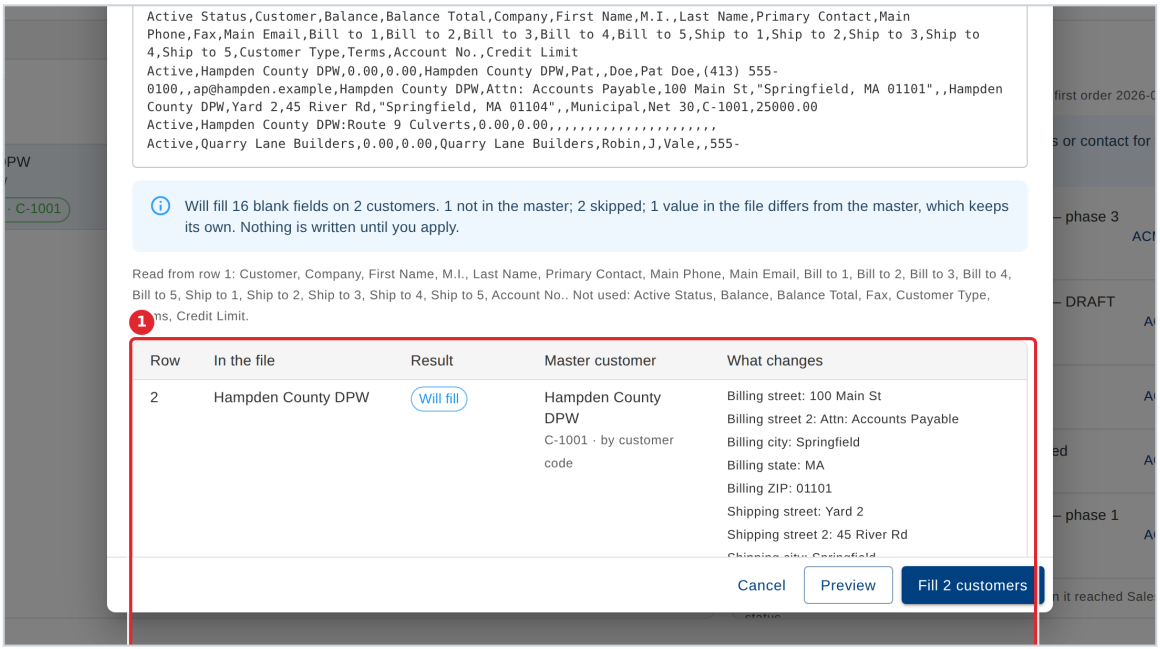
Step 2. Select Import billing & contacts.



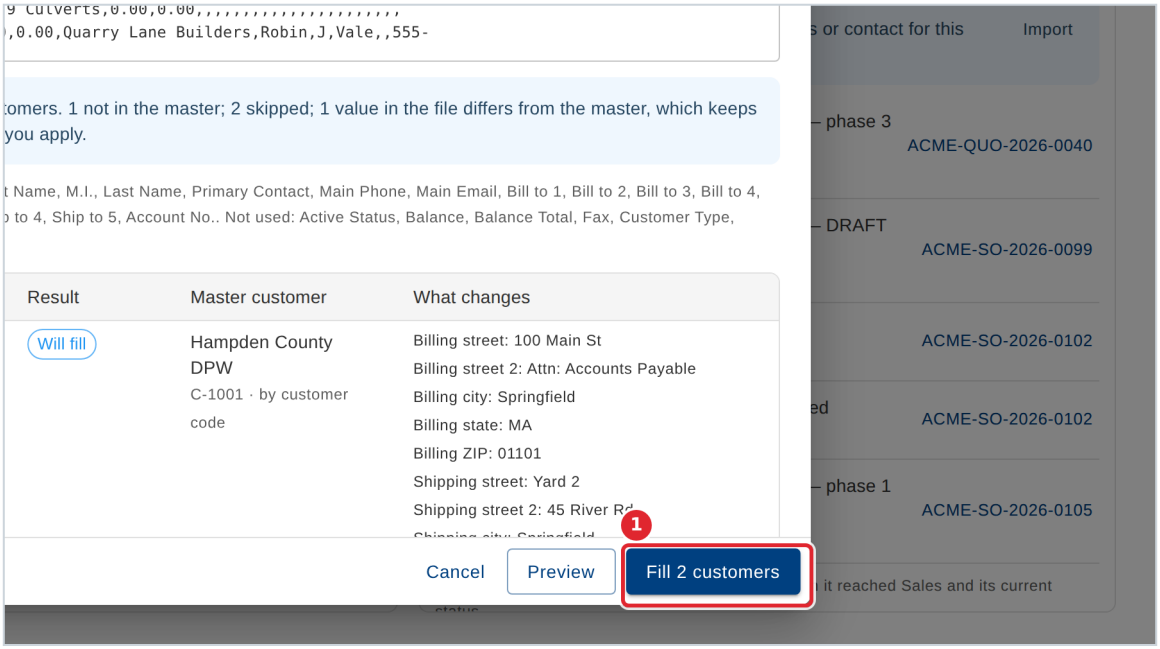
Step 3. Export your customer list from QuickBooks as a CSV file, as the dialog describes. Select Choose CSV file and pick it, or copy the rows from Excel, header row included, and paste them into the box.



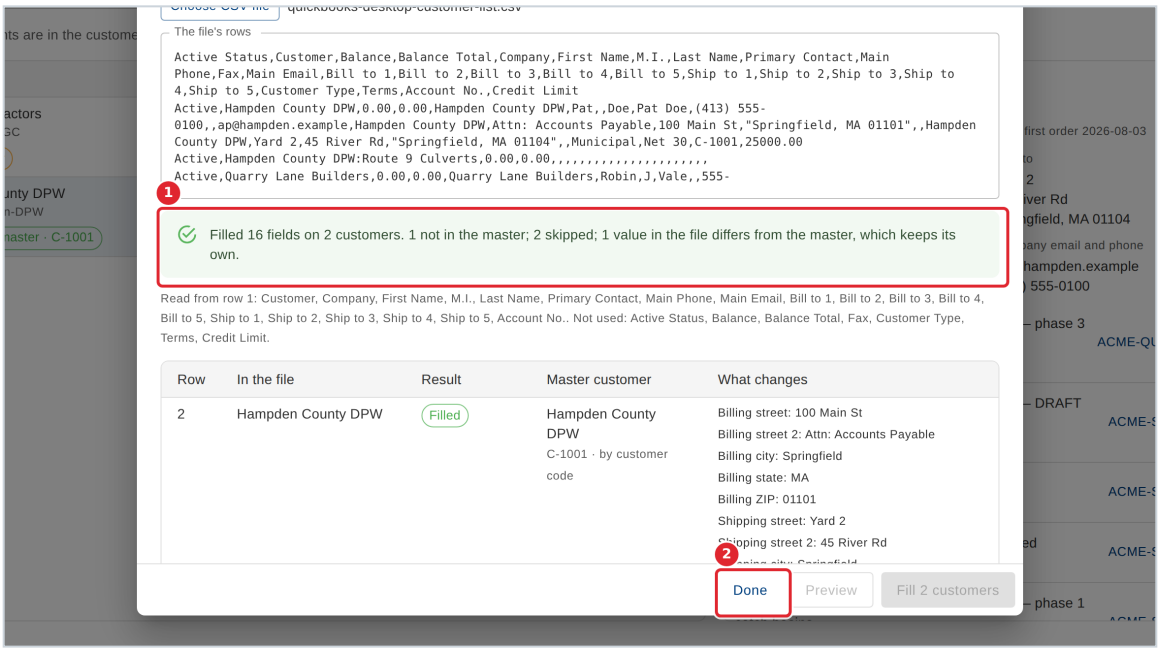
Step 4. Select Preview. Nothing is written yet. The summary says how many blank fields would be filled, and on how many customers.



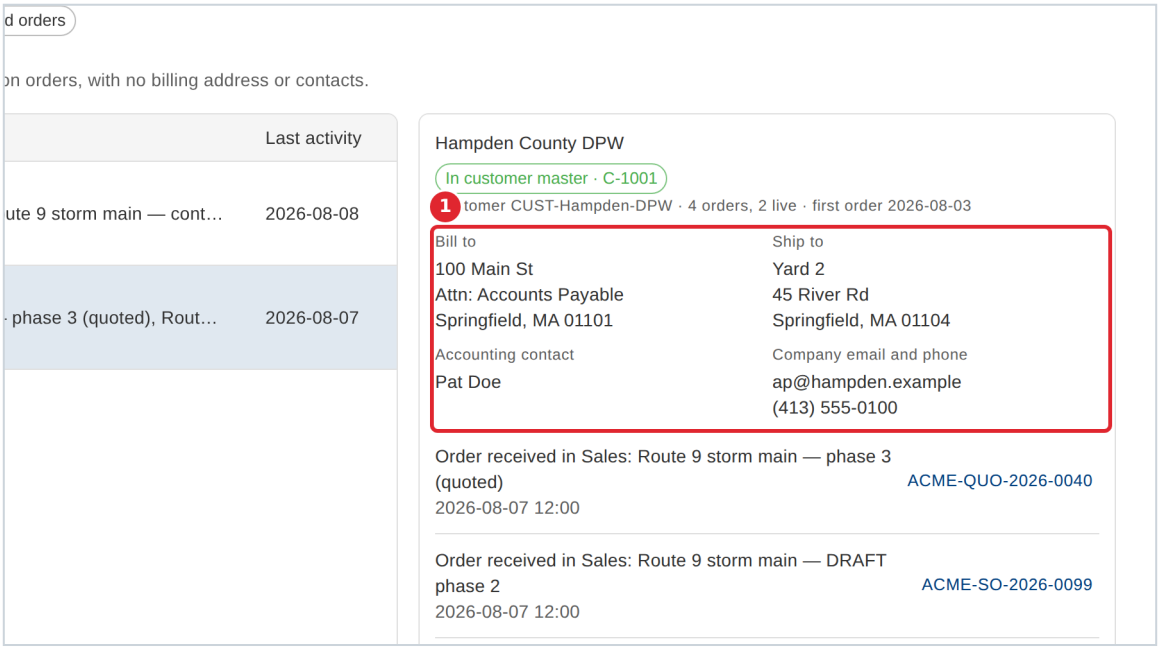
Step 5. Read the table. Each row of your file shows its result, the master customer it matched, and what would change. A value the master already holds is kept, and the row says so.



Step 6. When the preview is what you expect, select Fill. It names how many customers it will fill.



Step 7. The summary now says what was filled. Select Done.



Step 8. Select the client again. Its billing and shipping addresses and contacts now show beside its orders.

Tips:

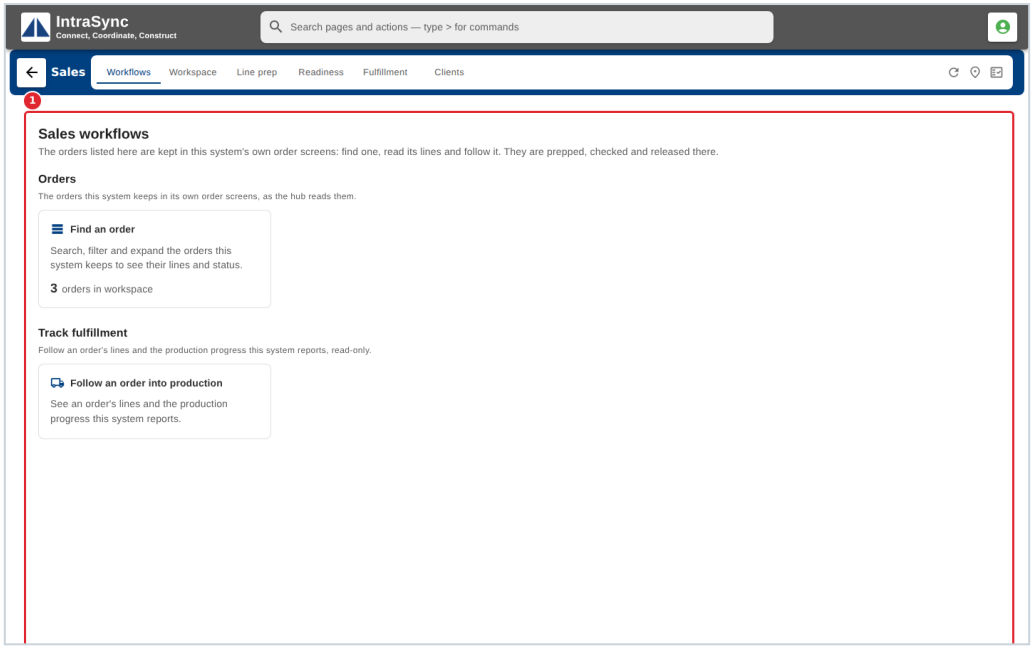
- Nothing the customer master already holds is changed. Where your file says something different, the preview shows the value the master keeps and the value in your file.
- Choosing another file, or changing the pasted rows, throws the preview away. Preview again before you fill.
- A list too large for one import is refused with a note. Split it into parts and import each one: importing the same part twice is safe.
- A row that matches no customer, or more than one, is listed with the reason and changes nothing.

17. Work with orders your own system keeps

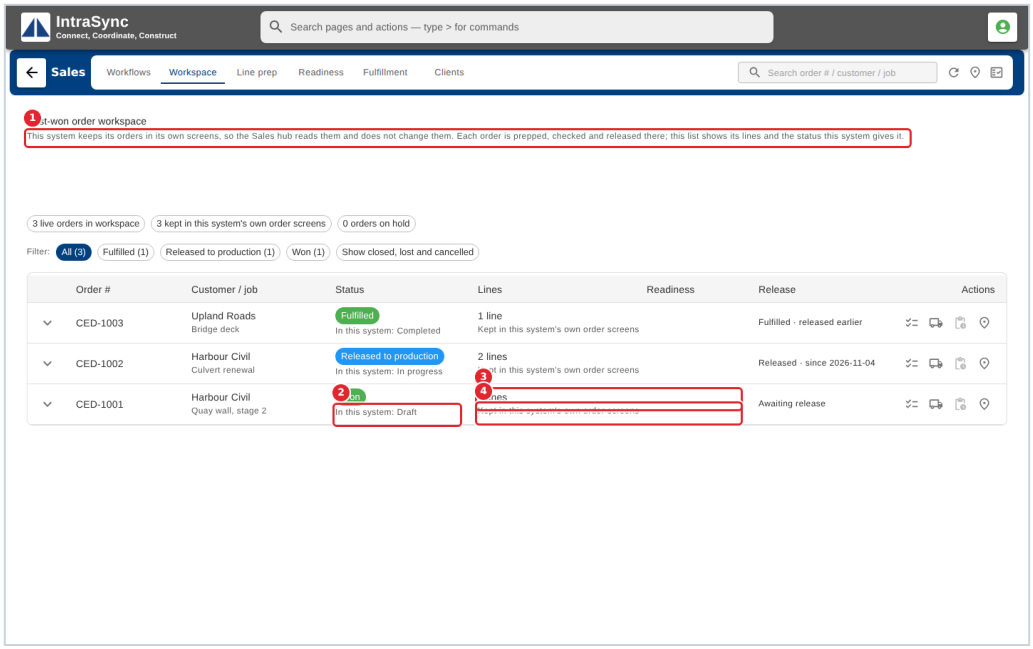
Some companies keep their orders in their own order screens. Sales then reads those orders, so you can find them and follow them through production, but it changes none of them and keeps no prep or readiness records for them. This section shows what is different.

Before you start:

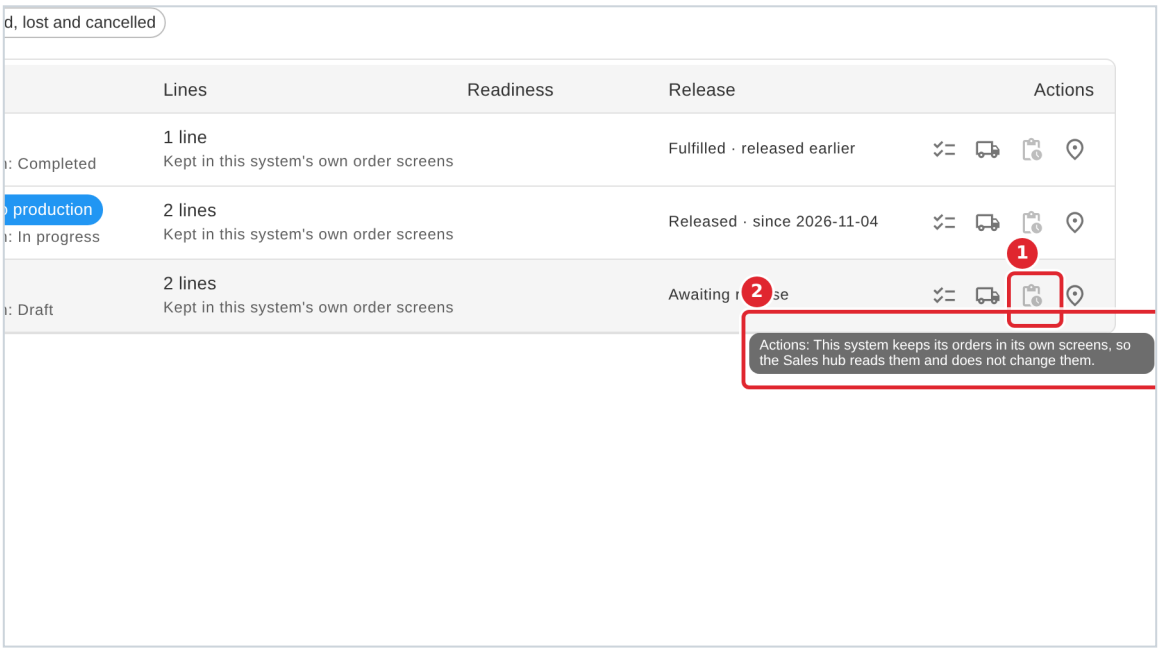
– Your company keeps its orders in its own system, and Sales is set up to read them there. If your orders do not show "In this system" beside their status, none of this applies to you.



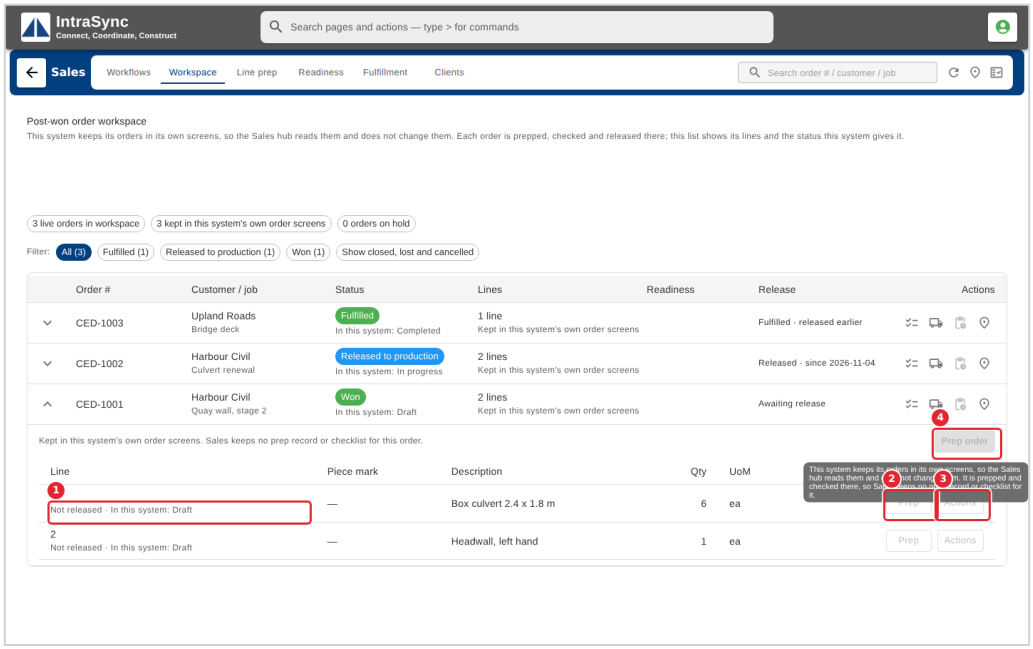
Step 1. Open Sales. When your orders are kept in your own system, Workflows says so, and offers only the work Sales can do on them: finding an order and following its fulfillment.



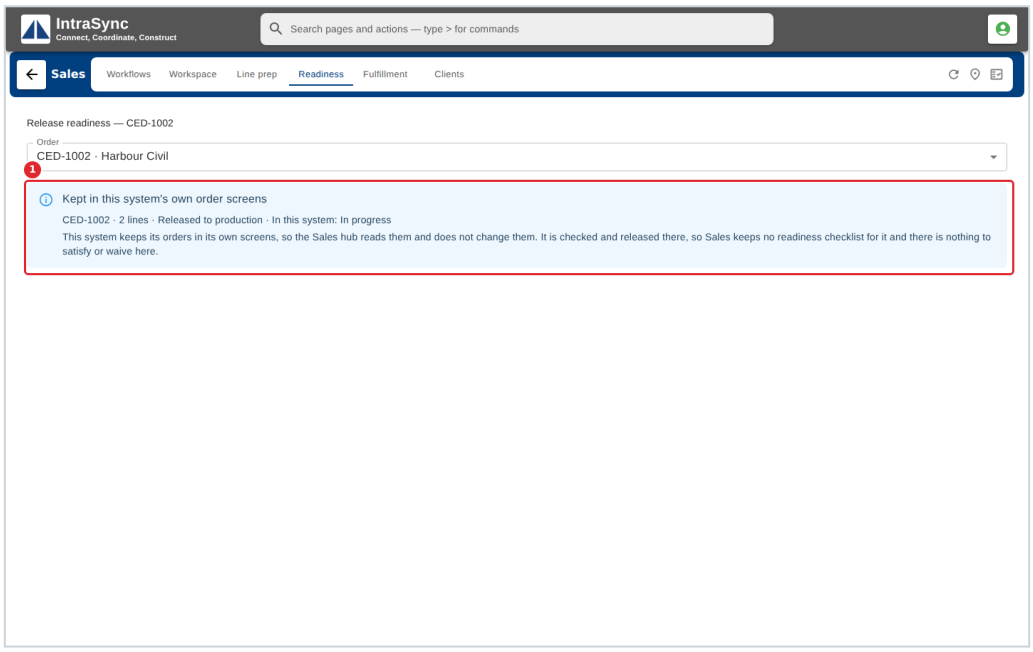
Step 2. Select Workspace. A note above the list says Sales reads these orders and does not change them. Each order shows its stage in Sales, your system's own status beside it, its number of lines, and that it is kept in your system's own order screens.



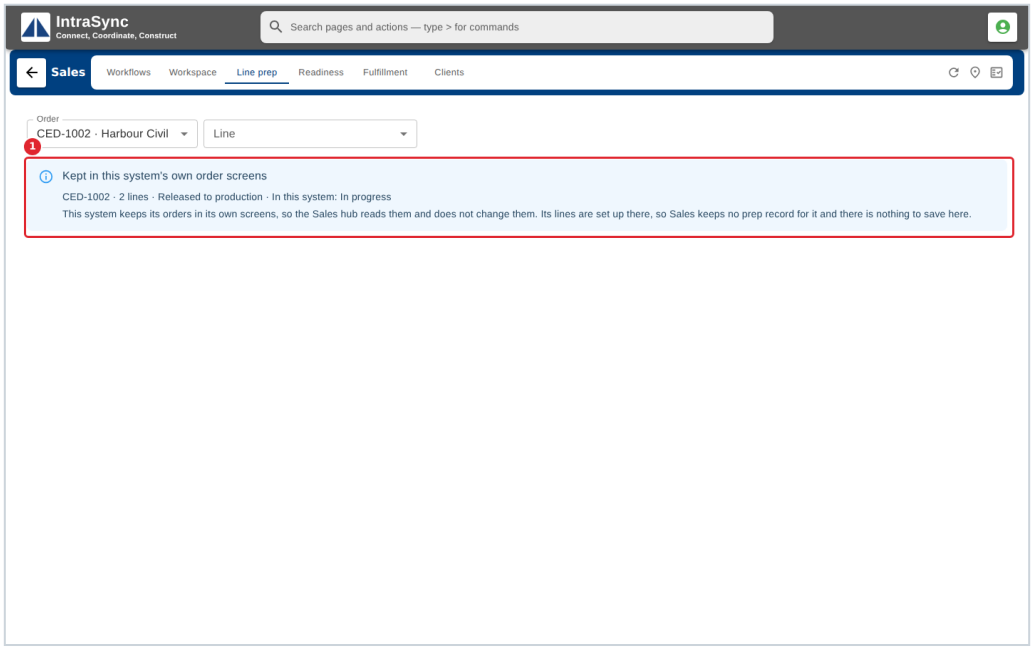
Step 3. The order's Actions button is off. Point at it to read why: your system keeps its orders in its own screens.



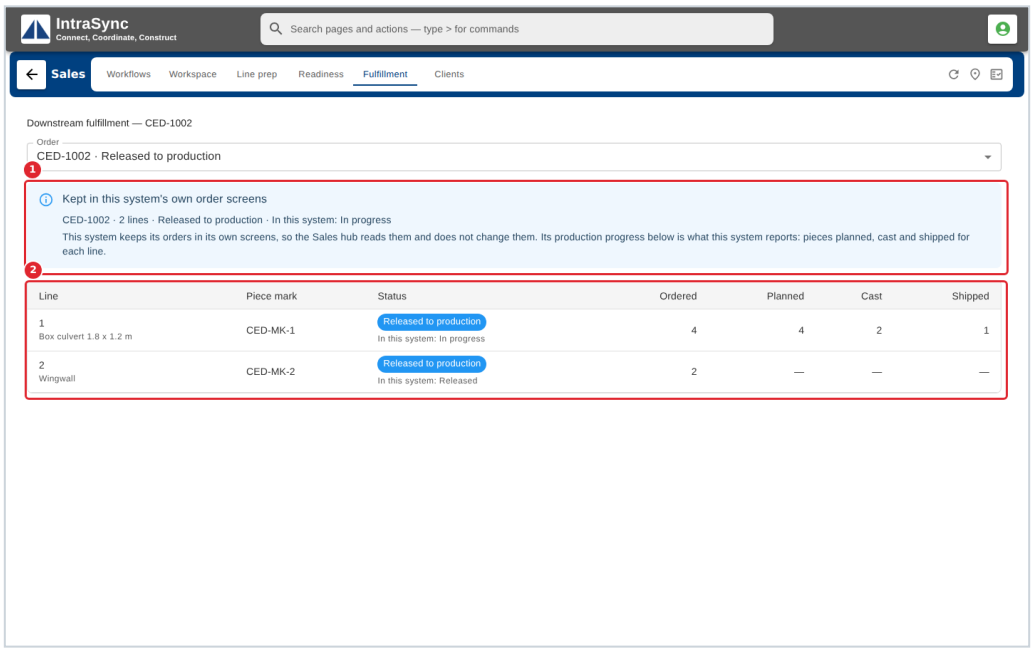
Step 4. Expand the order. Each line shows its status in Sales and in your system. Prep, the line's Actions and Prep order are off: these orders are prepped and checked in your own system, so Sales keeps no prep record or checklist for them. Point at a button to read why.



Step 5. Select Readiness on an order. In place of a checklist, a notice names the order, its lines and both statuses, and says the order is checked in your own system.



Step 6. Line prep shows the same kind of notice, and no prep form.



Step 7. Select Fulfillment. Each line shows the pieces planned, cast and shipped as your system reports them. A dash means your system reports nothing for that line yet.

Tips:

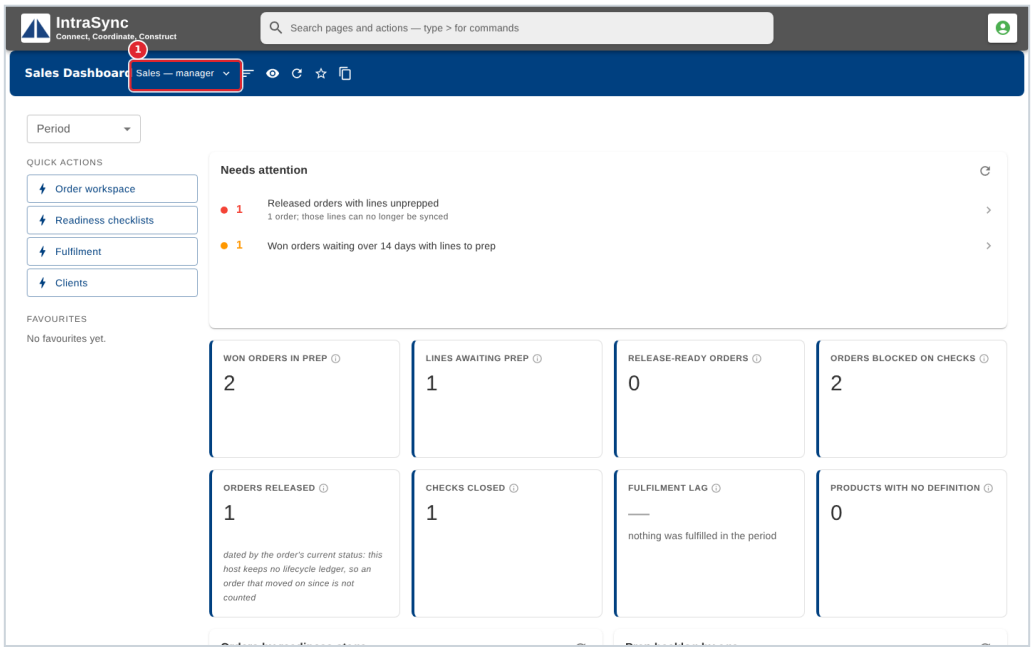
- On these orders Sales does not hold, resume, cancel or mark an order lost, and it does not prep, sync or check lines. Do that work in your own system's order screens.
- Opening these orders in Sales changes nothing in your system.
- Your system decides which of its orders Sales lists. An order it leaves out is not shown in the Workspace at all.
- Each button that is off carries its reason for screen readers too, so you do not need to point at it to find out why.

18. Watch the team's sales work on the manager board

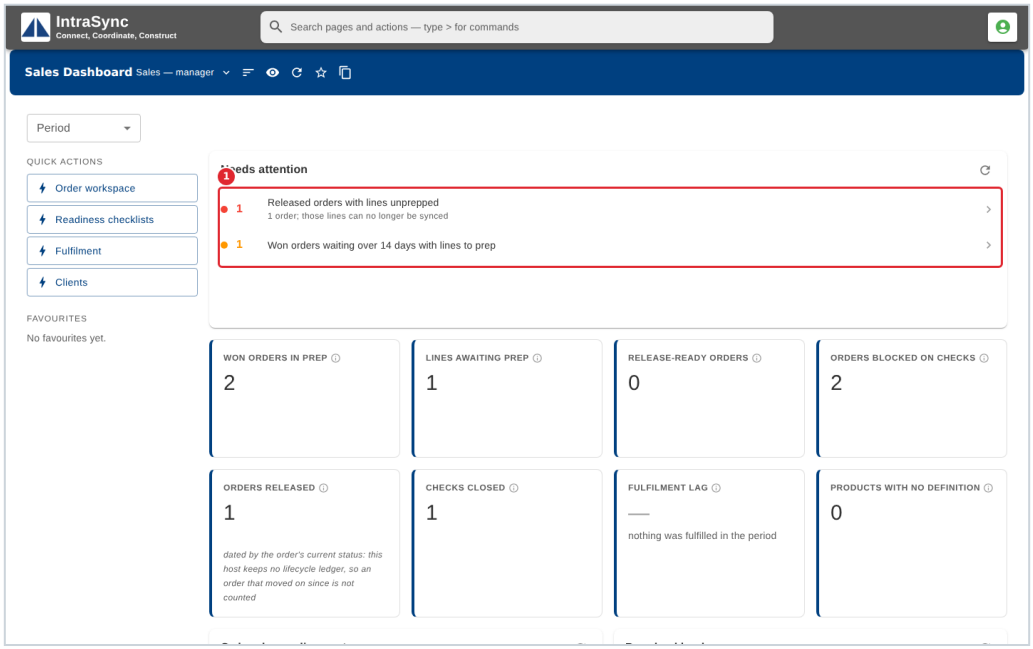
See across every salesperson where won orders are stuck, how big the prep backlog is, and who is carrying it.

Before you start:

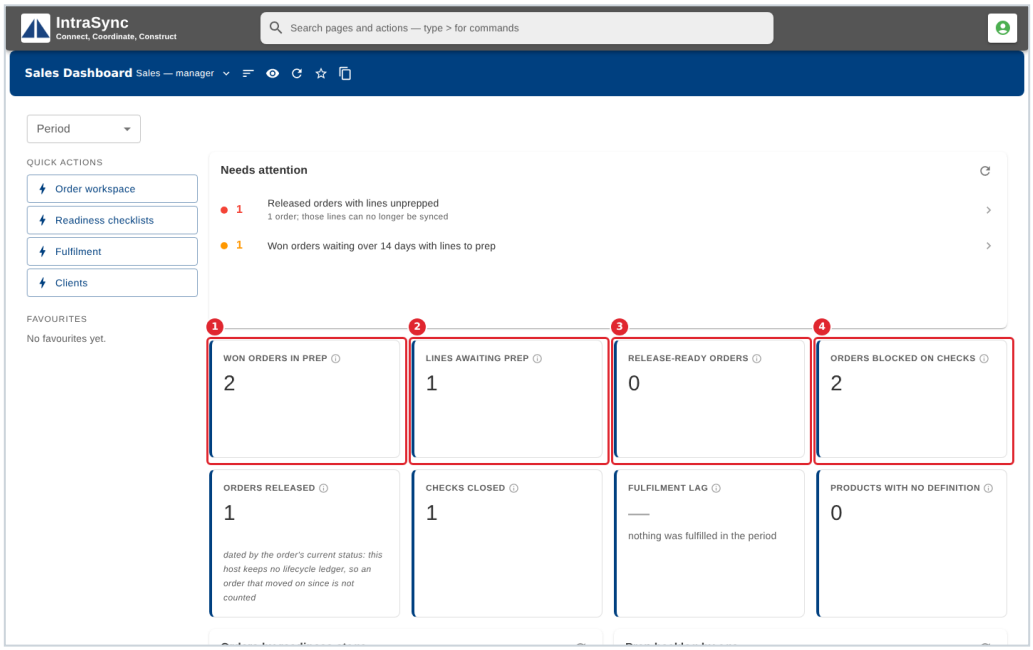
- Your company has the Sales Dashboard switched on.
- The department-wide figures need the permission "See the sales manager dashboard figures", given to sales managers by default. Without it, those widgets say the figure is unavailable.



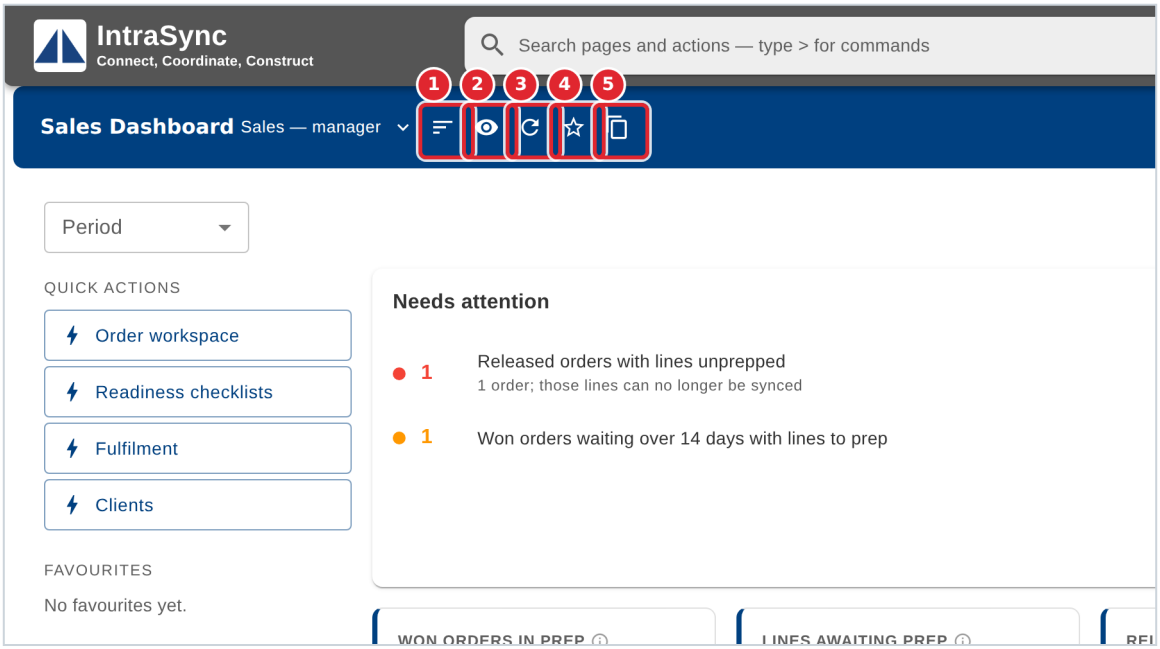
Step 1. A sales manager opens the Sales — manager board. Use the board picker to switch between the boards you can see.



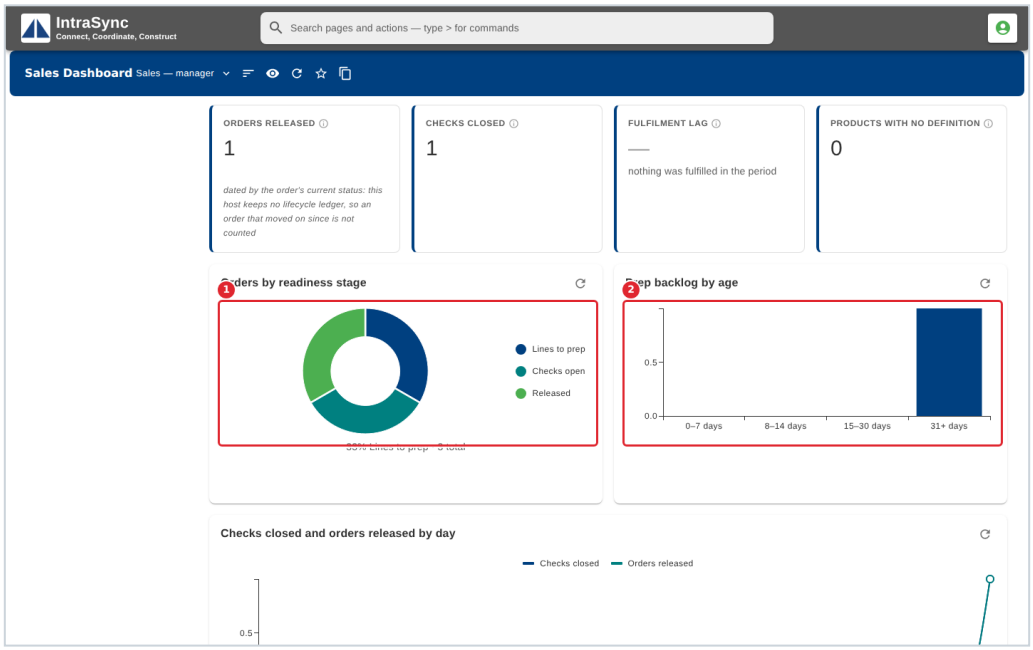
Step 2. Needs attention lists what is going wrong across the team's orders, such as released orders with lines still unprepped, or won orders waiting too long for prep.



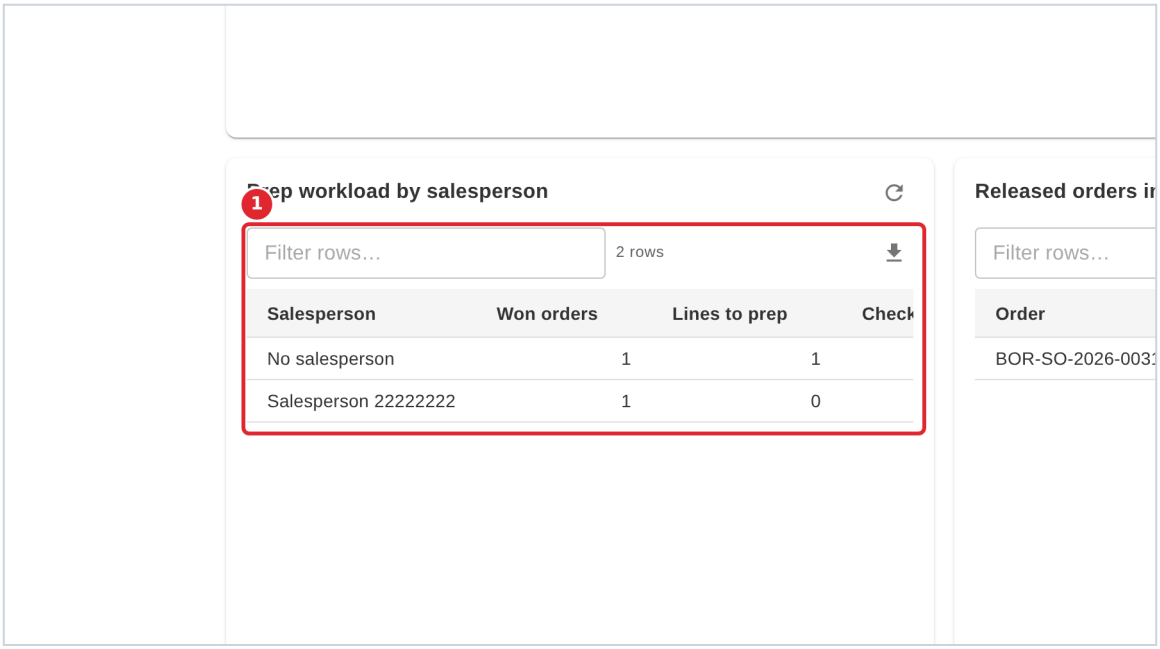
Step 3. The tiles count the whole team's work: orders in prep, lines awaiting prep, orders ready to release and orders blocked on checks.



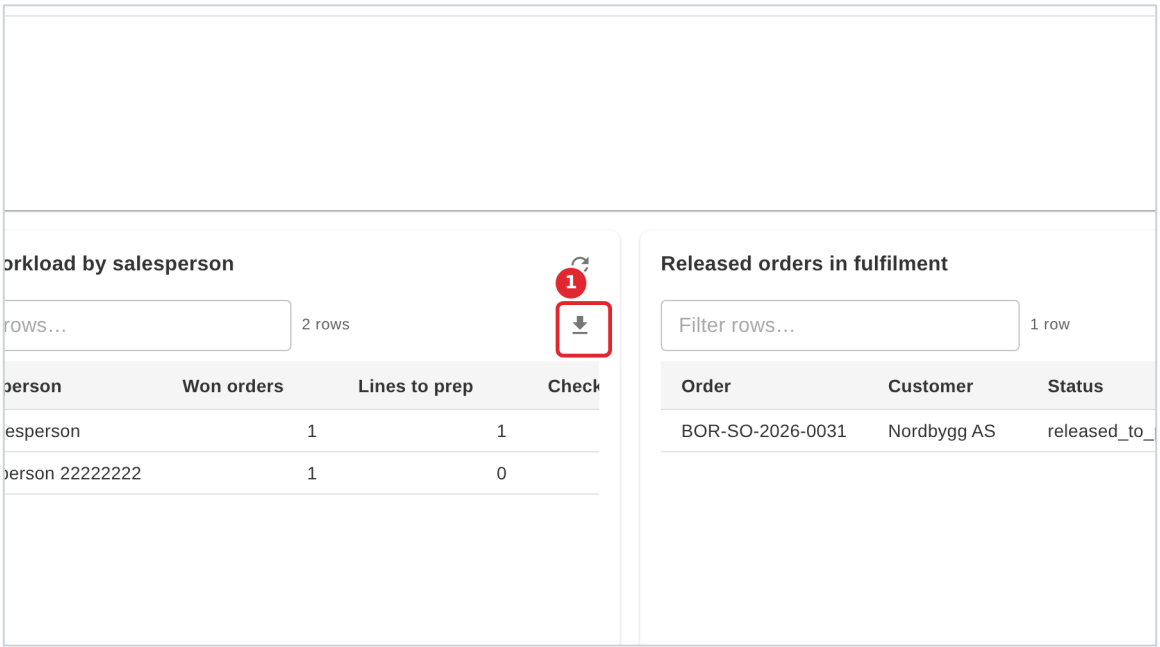
Step 4. The buttons beside the board name sort the widgets worst first, choose which widgets you see, refresh them all, make this your default board, or make your own copy.



Step 5. The charts show where the team's orders are: by readiness stage, and the prep backlog by age.



Step 6. Prep workload by salesperson shows each person's won orders, lines to prep, open checks, release-ready orders and orders on hold.



Step 7. To take a table's rows into a spreadsheet, select its download button.

Tips:

- Make my own copy makes a copy of the board that is yours. The shared board stays as it was.
- Refresh all widgets reloads every figure at once. Each widget also has its own refresh button.

Glossary

- Piece mark: The code that identifies a precast piece. Production and billing use it to match each cast piece back to its order line.
- Prep record: A line's production details in Sales: product, piece mark, definition and make

instructions.

- Sync: Writing a prepped line's details onto the production order line, where planning reads them.
- Readiness check: One item on an order's release checklist. It is satisfied, waived with a reason, or still open.
- Released to production: The order has been handed to the plant. This is done in Estimating.
- Lien notice: The notice sent to a project's contractor, sub-contractor and property owners. It is filled in from the project's addresses.
- Approval chain: The steps a custom item is signed through, in order, before it is approved for production. Your company keeps its own chain on the Steps tab of Custom item approvals.