

# **Unit 4**

## **Business World On!**

### Simple Sales Order User Guide

(Web users)



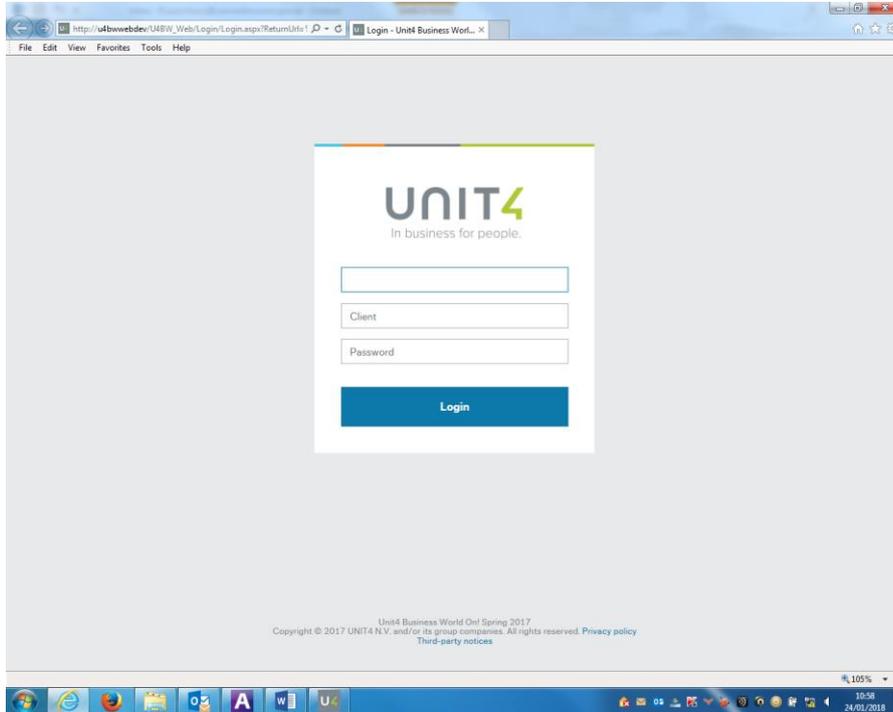
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## 1. Login to Unit 4 Business World On! web

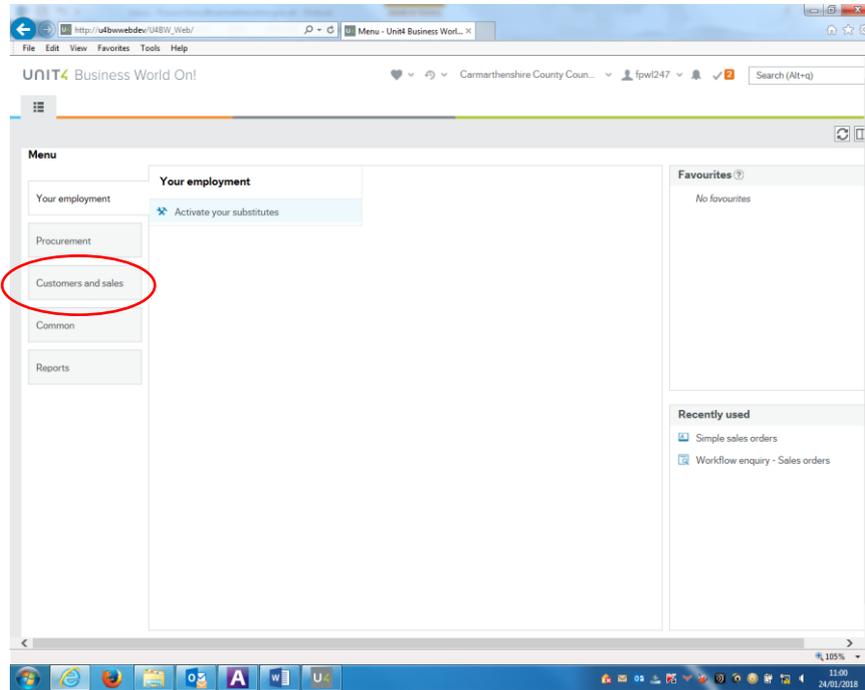
Double-click the Unit 4 icon on the Desktop.

Please enter your login details in the below screen.

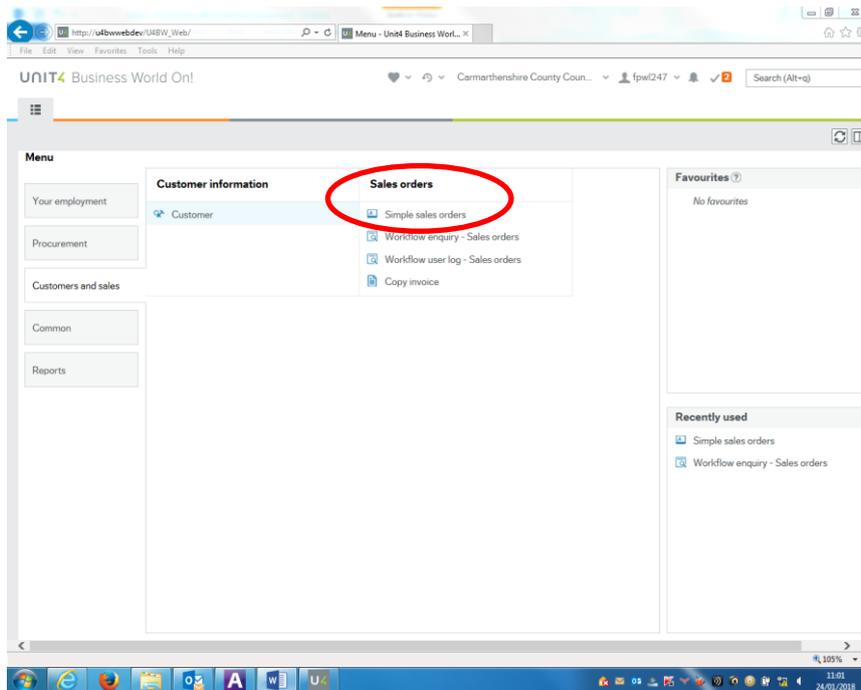


## 2. Navigating to simple sales orders

Click on **Customer and Sales**



Next, click on **Simple Sales Order**



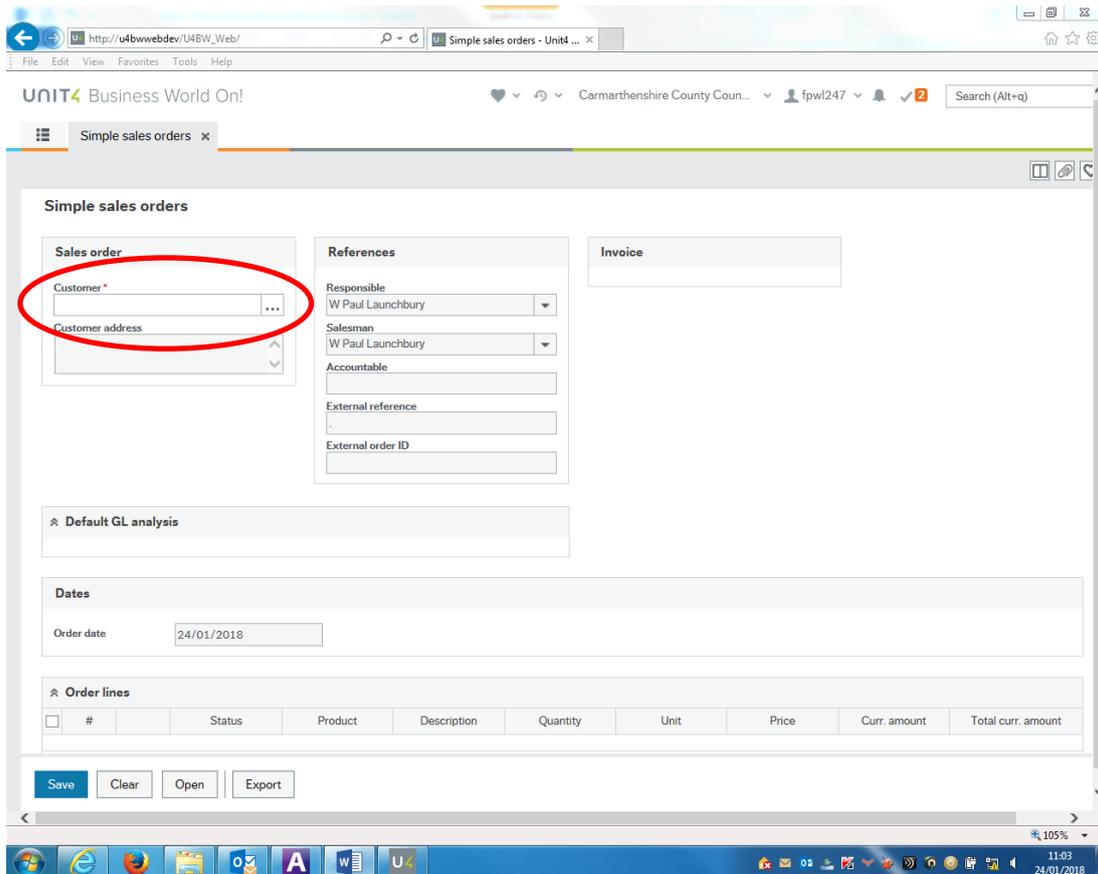
### 3. Searching for customers

Enter all details to create an invoice.

All fields marked with \* are mandatory

**NB: ALL ENTRIES MUST BE IN CAPITALS & OPEN PUNCTUATION**

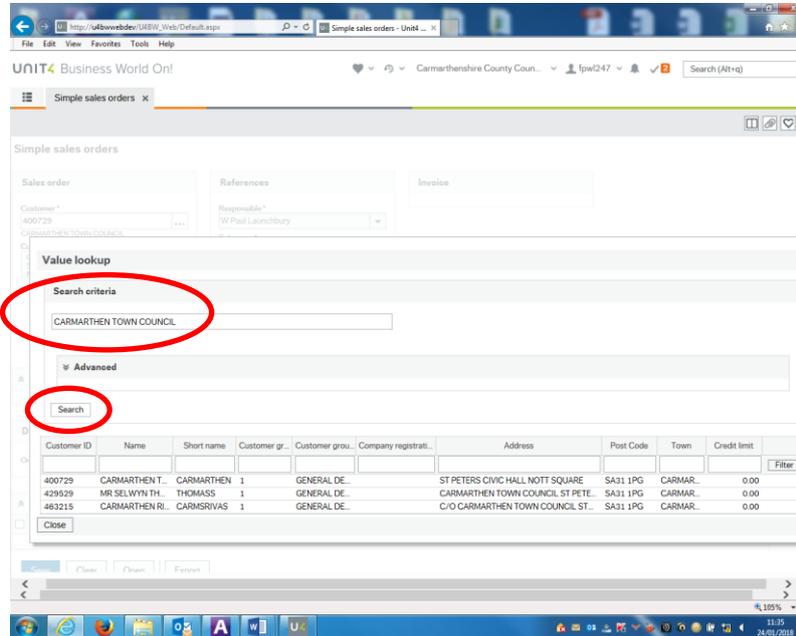
In the field marked **Customer\***, enter the customer id, e.g. 400100



To find a customer id click the search button alongside the field

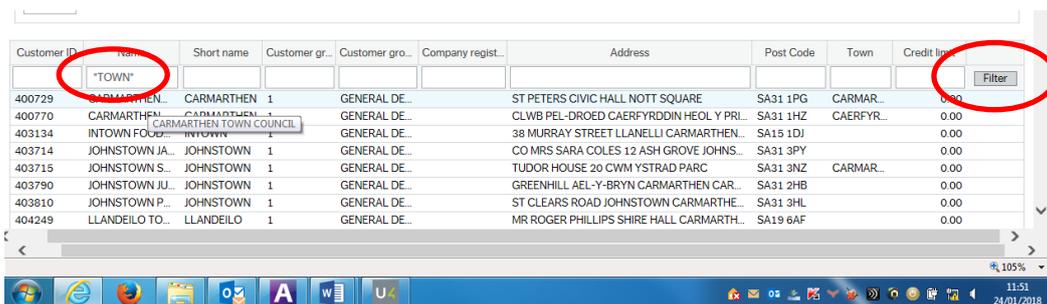


In the **Search Criteria** field, enter the name or address of the customer, in part or in full and click **Search** then click the correct customer from the list below.



Search can be further refined by entering more specific details in the boxes appearing on top of the list of customers displayed and by clicking on **Filter** on right hand side.

You can use \* as a wildcard.



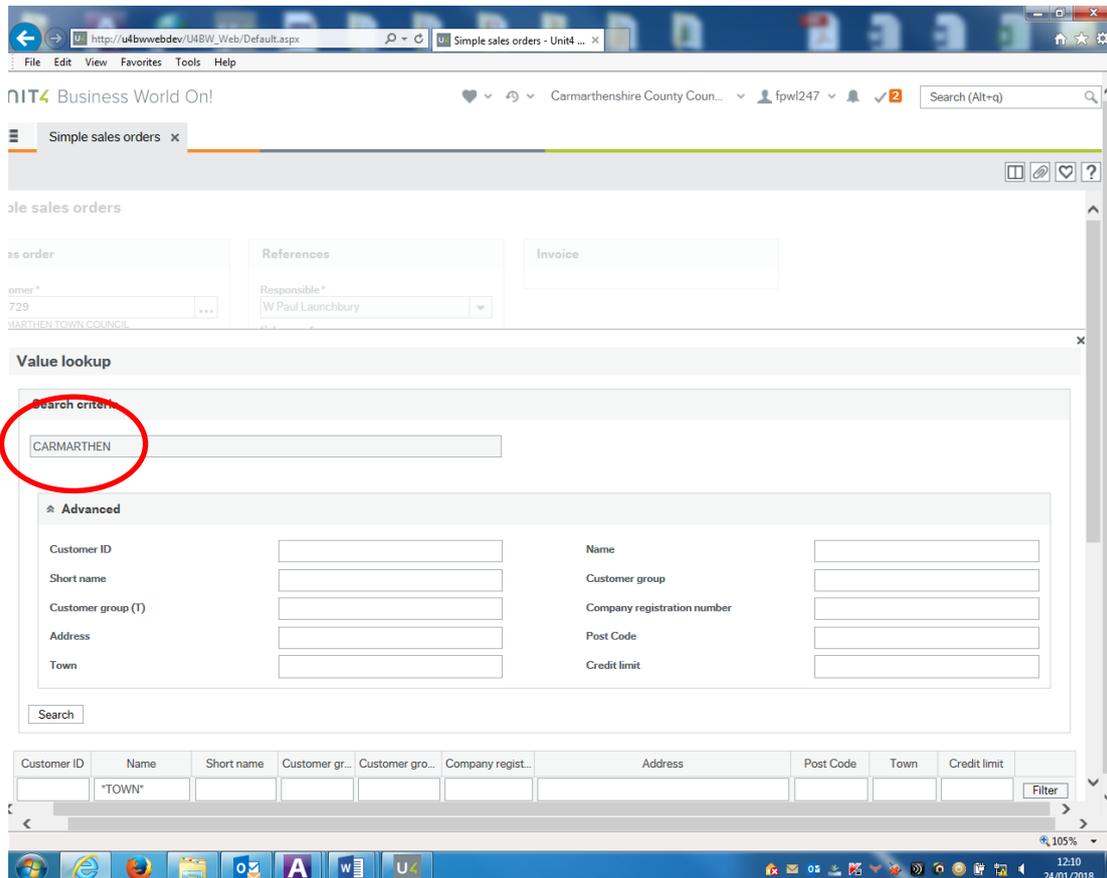
Again click the correct customer from the list.

**DO NOT USE IDS beginning with digit 5 - Only use ID's beginning with 4**

If the customer is not found then an **ADVANCED** search will be necessary.

Enter details in the appropriate field(s) eg. Name, Address, Town, Post code.

Use an asterisk \* as a wildcard at the beginning, end or in the middle of the search term, e.g. \*ANY\*TOWN\*. Double click on correct customer from the list below.



All users are required to search the system to establish if the customer already exists.

It may be necessary to undertake a few searches to make sure that the customer does not already exist on system – search via post code, surname, address.

When satisfied that the customer is not on the system, an email should be sent Debtors requesting that it is set up. Full addressee details are required - full name and initials - Christian name should be supplied, where possible, & if company - the full company name (no abbreviations), Address, including Post Code.

Information that is required to create a new customer is as follows:

Full Name

Title, Mr. Mrs. Rev, Doctor etc.

Full Address

Post Code

No customers will be set up without a Christian name and Post Code.

This should be forwarded to staff of the debtor section by e-mail who will notify you of the customer id number by return email.

Id's will not be set up for individual persons in a Company/ Organisation. If an invoice is for the attention of an individual or department within a Company then this information can be placed in the Accountable box when raising the sales order or alternatively it can be placed after the invoice narrative.

The Customer name & address details will now be transferred to the Simple Sales Order screen.

The screenshot shows the 'Simple sales orders' form in the UNIT4 Business World On! system. The form is divided into several sections:

- Sales order:** Contains fields for Customer (400729, CARMARTHEN TOWN COUNCIL) and Customer address (CARMARTHEN TOWN COUNCIL, ST PETERS CIVIC HALL, NOTT SQUARE).
- References:** Contains fields for Responsible (W Paul Launchbury), Salesman (W Paul Launchbury), Accountable, External reference, and External order ID.
- Invoice:** An empty box for the invoice narrative.
- Default GL analysis:** A section for default GL analysis.
- Dates:** Contains the Order date field set to 24/01/2018.
- Order lines:** A table with columns for #, Status, Product, Description, Quantity, Unit, Price, Curr. amount, and Total curr. amount.

At the bottom of the form, there are buttons for Save, Clear, Open, and Export. The system interface includes a search bar, user information (fpw1247), and a taskbar at the bottom showing the time as 11:41 on 24/01/2018.

## 4. Create new simple sales order

Once the Customer is found and selected the process of entering all other mandatory fields marked with an \* is undertaken.

The screenshot displays the 'Simple sales orders' web application interface. The page is titled 'Simple sales orders' and shows a form with several sections:

- Sales order:**
  - Customer\* (400729)
  - Customer address (CARMARTHEN TOWN COUNCIL, ST PETERS CIVIC HALL, NOTT SQUARE)
- References:**
  - Responsible\* (W Paul Launchbury)
  - Salesman\* (W Paul Launchbury)
  - Accountable
  - External reference
  - External order ID
- Default GL analysis:**
- Dates:**
  - Order date (24/01/2018)
- Order lines:**

#	Status	Product	Description	Quantity	Unit	Price	Curr. amount	Total curr. amount

At the bottom of the form, there are buttons for 'Save', 'Clear', 'Open', and 'Export'.

Fields include:

**Responsible field:** - will be populated automatically. This will be the person entering the order.

**Salesman field:** - choose from drop down menu. This will be the person who can be contacted by the customer in the event of a query relating to the invoice.

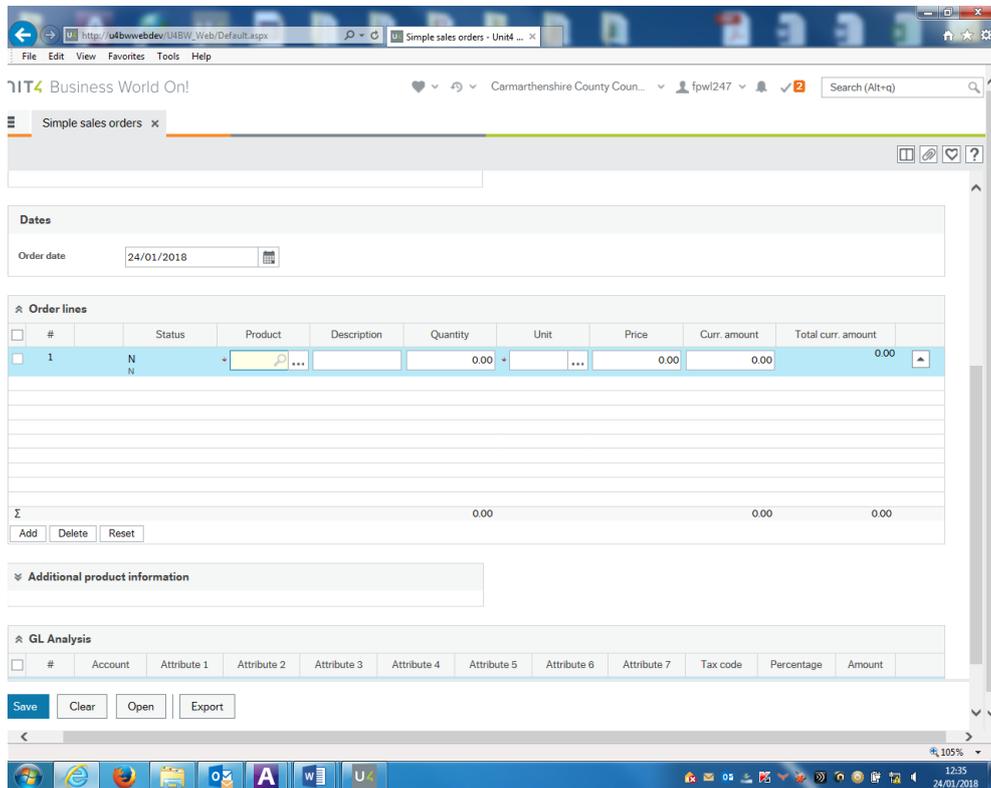
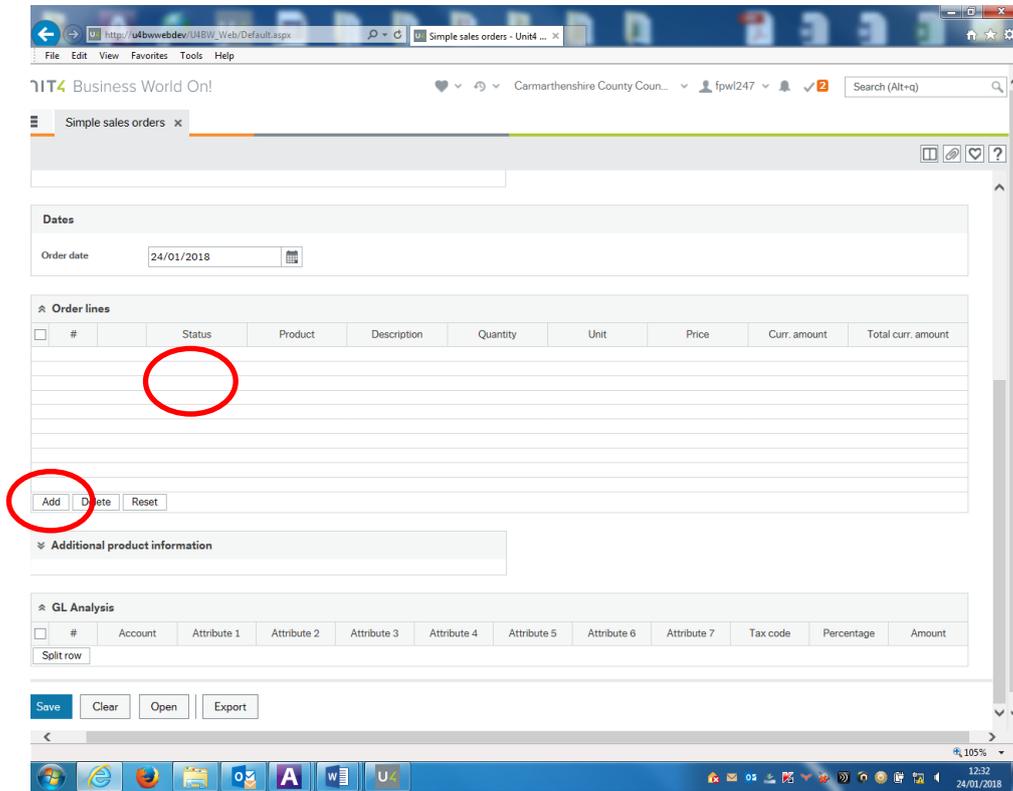
**Accountable field:** the contact name at the Company/organisation

**External reference:** e.g. customer order number, reference number

Once these fields have been completed the entry of main body/detail of the invoice can commence.

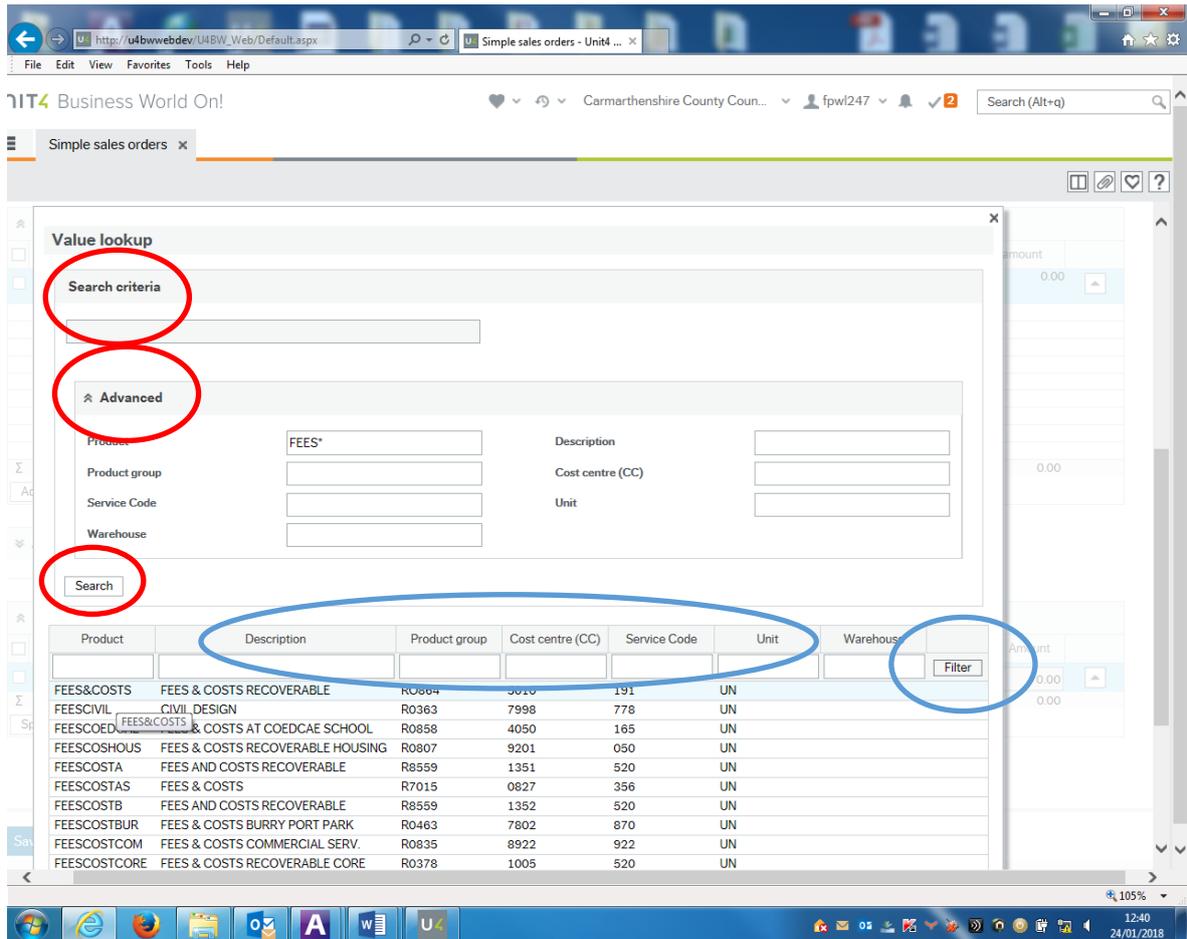
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Scroll Down the page and click a blank line or **Add** to enter the order details.



Click the cursor into product field, if you know your product code key in the code or click  to search for the Product and code.

Use the **Search Criteria** field or **Advanced** and click the **Search** button to find the product. Use \* if needed. To narrow the results further use the boxes above the results and click **Filter**.



Click to select the correct product from the results list.

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The screenshot displays the 'Simple sales orders' interface. The 'Order lines' table contains the following data:

#	Status	Product	Description	Quantity	Unit	Price	Curr. amount	Total curr. amount
1	N	FEEES&COSTS	FEEES & COSTS RECOVERABLE	1.00	UN	150.00	150.00	180.00
	N	FEEES & COSTS RECOVERABLE						
Σ				1.00			150.00	180.00

The 'Additional product information' section is expanded, showing the following details:

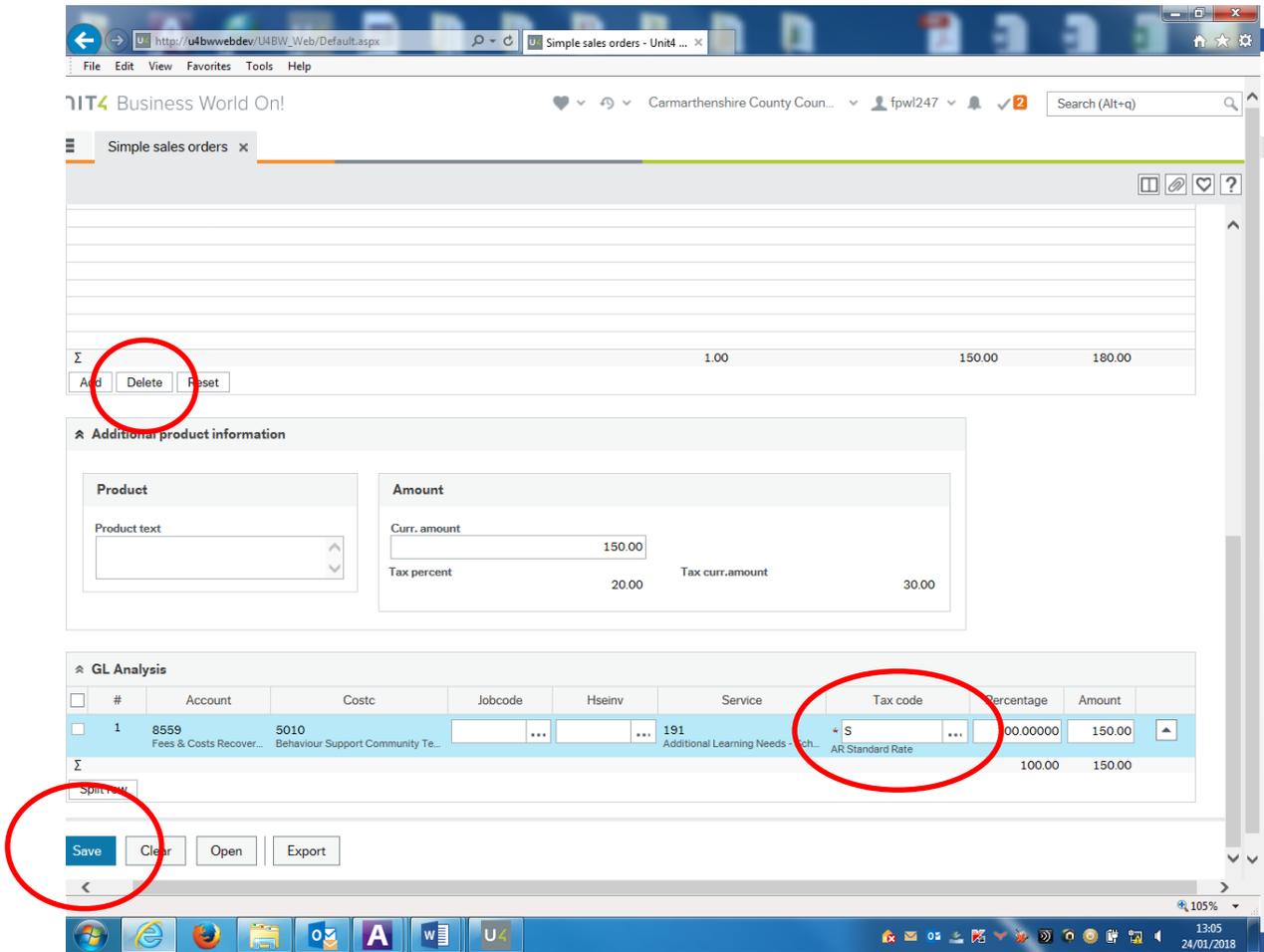
- Product: FEEES & COSTS RECOVERABLE
- Product text: [Empty text box]
- Amount: Curr. amount 150.00, Tax percent 20.00, Tax curr. amount 30.00

Click in **Quantity** field and enter details if appropriate

Click in the **Price** field if needed and enter the cost of the service (without VAT).

Click in **Additional Product Information** and enter a description or purpose for the invoice. All entries MUST be in capitals & open punctuation. The date & full details of service should be provided.

Scroll down further and check the GL Analysis fields hold the correct accounting codes and Tax code (VAT).



**VAT** code –it is the responsibility of the issuing Department to ensure that the correct indicator is used. Any queries concerning VAT should be directed to the VAT officer or your accountancy section.

Click **Add** if any further product lines are required and repeat as above.

If an error is made when keying in a product click on the **Delete** box on the extreme left of the Product row. Once an order is saved a Product cannot be changed.

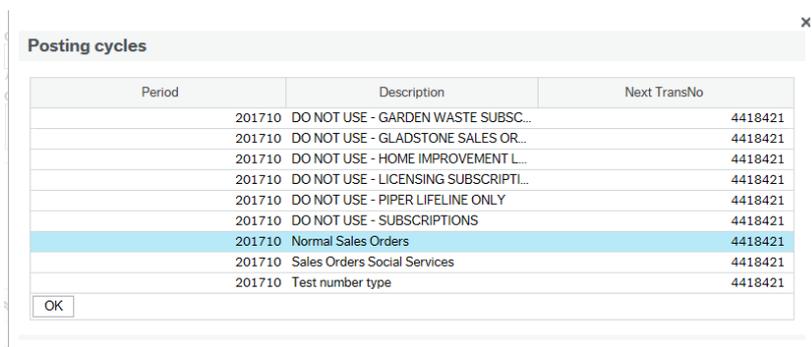
Check all details are correct then click **Save**.

A new screen 'Posting Cycles' is displayed.

Social Services should select **Sales Orders Social Services**

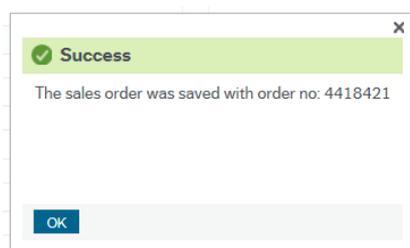
All other staff should select **Normal Sales Orders**

**Invoices raised under an incorrect option may be cancelled and will have to be raised again.**



Click OK.

A confirmation box with the Sales Order Reference will be displayed.



If any errors are discovered after an order has been saved please contact the Debtors team on 01267 228730.

A copy of all relevant documentation should be retained by the issuing Department as evidence that the debt is due from the customer.

This evidence will be requested to prove the debt is valid should the customer dispute the invoice or if additional measures are need to recover the debt such as Legal action.

Invoices which cannot be supported by documentary evidence may be cancelled.