# Unit 4 Business World On!

## Simple Sales Order User Guide

(Web users)





#### Contents

1.	Login to Unit 4 Business World On! web	2
2.	Navigating to simple sales orders	
3.	Searching for customers	
4.	Create new simple sales order	

#### 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.

Difference in the second secon	ogin/Login.aspriRetumUdis1 D + C U Login - Unit8 Business Work ×	
e Edit View Favorites Tools Help		
	UNIT	
	In business for people.	
	Client	
	Password	
	Login	
	Copyright © 2017 UNIT4 N.V. and/or its group companies. All rights reserved. Privacy policy Third-party notices	
		₹ 105%
	2 A 🔍 UZ 🏠 🗠	05 🗻 🕅 🛩 💩 🕥 🕫 🕥 📢 🕺 1058

#### 2. Navigating to simple sales orders

#### Click on *Customer and Sales*

Edit View Favorites Tools Help	ພ
1174 Business World On!	marthenshire County Coun v 🚊 fpwl247 v 🌲 🗸 🔁 Search (Alt+q)
· · · · · · · · · · · · · · · · · · ·	[
enu Your employment	Favourites 🔊
four employment	No favourites
Procurement	
Justomers and sales	
Common	
Reports	
	Dependence
	Simple sales orders
	🔀 Workflow enquiry - Sales orders
	۹ ان

#### Next, click on Simple Sales Order

Edit View Favorites	ev/U48W_Web/ ,O · Tools Help	C U Menu - Unit4 Business Worl ×	<u></u>
NIT4 Business V	World On!	🆤 👻 🥠 👻 Carmarthenshire County Coun	✓ 1 fpwl247 ✓ ▲ ✓ 2 Search (Alt+q)
I			
mu			Favourites (?)
our employment	Customer information	Sales orders	No favourites
	♀ Customer	Simple sales orders	
rocurement		Workflow enquiry - Sales orders	
		Workflow user log - Sales orders	
ustomers and sales		Copy invoice	
ommon			
eports			
			Recently used
			Simple sales orders
			Workflow enquiry - Sales orders

#### 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

IIT4 Business World On!		🖤 🗸 🐬 🗸 Carn	narthenshire County C	Coun 👻 🧘 fpwl:	247 🗸 🌲 🗸 2	Search (Alt+q)
Simple sales orders ×						
Simple sales orders						
Sales order	References	I	nvoice			
Customer*	Responsible					
	W Paul Launchbury	*				
Customer address	W Paul Launchbury	•				
×	Accountable					
	External reference					
	External order ID					
	External order 1D					
☆ Default GL analysis						
Dates						
batts						
Order date 24/01/2018						
☆ Order lines						
# Status	Product Descri	ption Quantity	Unit	Price	Curr. amount	Total curr. amount

To find a customer id click the search button alongside the field  $\square$ 

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.

					♥ ✓ 小 ✓ Carr	narthenshire County Coun 👻 🧘 fpw	(247 ~ 単 、	563	rcn (Alt+q)	
Simple sa	les orders ×								Π	
ple sales or	ders									
les order		Re	ferences		Inve	pice				
					v					
Value look	sup									
Search or	iteria									
Search or	iteria HEN TOWN COUNC	$\mathbf{\Sigma}$								
Search or	iteria HEN TOWN COUNC	>								
Search or	iteria HEN TOWN COUNC	>								
Search or CARMART	iteria HEN TOWN COUNC	>								
Search or CARMART	iteria HEN TOWN COUNC	>								
Search or CARMART	iteria HEN TOWN COUNC									
Search or CARMARTI ¥ Adva Search	iteria HEN TOWN COUNC		Onteres	0.4			Pert Cafe	Terre	Cathor	
Search or CARMART ¥ Adva Search Customer ID	iteria HEN TOWN COUNC anced Name	Short name	Customer gr	Customer grou.	Company registrati	Address	Post Code	Town	Credit limit	
Search or CARMART ¥ Adva Search Customer ID	HEN TOWN COUNC anced Name	Short name	Customer gr	Customer grou	Company registrati	Address CF DFTERS (FN/P Hall MOTT SPILIDE	Post Code	Town	Credit limit	Fil
Search or CARMARTI & Adva Search Customer ID 400729 429529	iteria HEN TOWN COUNC anced Name CARMARTHEN T MR SELWYN TH	Short name CARMARTHEN THOMASS	Customer gr	Customer grou. GENERAL DE. GENERAL DE.	Company registrati	Address ST PETERS CIVIC HALL NOTT SQUARE CARMARTIEN TO NON COLARCE, ST PETE	Post Code SA31 1PG SA31 1PG	Town CARMAR_ CARMAR_	Credit limit	Fil
Search or CARMARTI ¥ Adva Search Customer ID 400729 429529 463215	Iteria HEN TOWN COUNC Inced Name CARMARTHEN T MR SELWYN TH CARMARTHEN T	Short name CARMARTHEN THOMASS CARMSRIVAS	Customer gr 1 1	Customer grou GENERAL DE GENERAL DE GENERAL DE	Company registrati.	Address ST PETERS CIVIC HALL NOTT SQUARE CARNARTIENT TOM COUNCILS JF PETE C- O CARMARTIEN TOWN COUNCILS JF PETE	Post Code SA31 IPG SA31 IPG SA31 IPG	Town CARMAR_ CARMAR_ CARMAR_	Credit limit 0.00 0.00 0.00	Fit
Search or CARMART & Adva Search Customer ID 400729 429529 469215 Close	Iteria HEN TOWN COUNC anced Name CARMARTHEN T MR SELWYN TH CARMARTHEN RI	Short name CARMARTHEN HOMASS CARMSRIVAS	Customer gr	Customer grou. GENERAL DE. GENERAL DE.	Company registrati.	Address ST PPERS CIVIC HALL NOTT SQUARE CARAVATHEN TOWN COUNCL ST C/O CARMATHEN TOWN COUNCL ST	Post Code SA31 1PG SA31 1PG SA31 1PG	Town CARMAR_ CARMAR_ CARMAR_	Credit limit 0.00 0.00	Fit
Search or CARMART & Adva Search Customer ID 400725 429529 483215 Close	Iteria HEN TOWN COUNC anced Name CARMARTHEN T KARSLIVIN TH CARMARTHEN RI	Short name CARMARTHEN CARMARTHAS CARMSRIVAS	Customer gr 1 1	Customer grou. GENERAL DE GENERAL DE GENERAL DE	Company registrati	Address ST PETERS CIVIC HALL NOTT SQUARE CARAVETHEN TOWN COUNCL ST C/O CARAVETHEN TOWN COUNCL ST.	Post Code SA31 1PG SA31 1PG	Town CARMAR_ CARMAR_ CARMAR_	Credit limit 0.00 0.00 0.00	Fil

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.

Customer	ID Ivan	Short name	Customer gr	Customer gro	Company regist	Address	Post Code	Town	Credit lips	
	*TOWN*									Filter
400729	OADMARTHEN	CARMARTHEN	1	GENERAL DE		ST PETERS CIVIC HALL NOTT SQUARE	SA31 1PG	CARMAR	0.90	
400770	CARMARTHEN			GENERAL DE		CLWB PEL-DROED CAERFYRDDIN HEOL Y PRI	SA31 1HZ	CAERFYR	0.00	
403134	INTOWN FOUD	INTOWN	T	GENERAL DE		38 MURRAY STREET LLANELLI CARMARTHEN	SA15 1DJ		0.00	
403714	JOHNSTOWN JA	JOHNSTOWN	1	GENERAL DE		CO MRS SARA COLES 12 ASH GROVE JOHNS	SA31 3PY		0.00	
403715	JOHNSTOWN S	JOHNSTOWN	1	GENERAL DE		TUDOR HOUSE 20 CWM YSTRAD PARC	SA31 3NZ	CARMAR	0.00	
403790	JOHNSTOWN JU	JOHNSTOWN	1	GENERAL DE		GREENHILL AEL-Y-BRYN CARMARTHEN CAR	SA31 2HB		0.00	
403810	JOHNSTOWN P	JOHNSTOWN	1	GENERAL DE		ST CLEARS ROAD JOHNSTOWN CARMARTHE	SA31 3HL		0.00	
404249	LLANDEILO TO	LLANDEILO	1	GENERAL DE		MR ROGER PHILLIPS SHIRE HALL CARMARTH	SA19 6AF		0.00	
										>
<										>
										₫ 105% ▼
<b>?</b>	🧟 🙋 🧵	3 🛂	Α	04		de i	🛛 💀 🚣 K	🧡 🖗 🔟 🕻	0 😳 🛱 🖬 🌖	11:51 24/01/2018

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.

Business World On!		🎔 🗸 🕫	✓ Carmarthenshire County Coun ✓	👤 fpwl247 👻 💂	√2 S	earch (Alt+q)	
Simple sales orders 🗙							
							] 🖉 😋
les orders							
r	References		Invoice				
	Responsible *						
I TOWN COUNCIL	W Paul Launchbury	Ψ.					
e lookun							
arch oritor							
arch criter RMARTHEN & Advanced Customer ID			Name				
arch onten RMARTHEN A Advanced Customer ID Short name			Name Customer group				
Arch onten RMARTHEN Advanced Customer ID Short name Customer group (T) Addrear			Name Customer group Company registration number Part Code				
arch oriton RMARTHEN * Advanced Customer ID Short name Customer group (1) Address Town			Name Customer group Company registration number Post Code Credit limit				
Arch criten RMARTHEN Advanced Customer ID Short name Customer group (T) Address Town Parch			Name Customer group Company registration number Post Code Credit limit				
Arch oriten RMARTHEN Advanced Customer ID Short name Customer group (1) Address Town Barch Dame Shor	t name Customer gr. /	Customer gro Company regis	Name Customer group Company registration number Post Code Credit limit	Post Code	Town	Credit limit	

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.

Image: http://u4bwwebdev/U4BW_Web/Default.as     Edit View Favorites Tools Help	px 오 - 이 U Simple sales o	rders - Unit4 .				
T4 Business World On!	Ψ~	ov c	armarthenshire County Co	oun 👻 🧘 fpwl24	7 v 🌲 🗸 2	Search (Alt+q)
Simple sales orders						
Simple sales orders in						
mple sales orders						
Sales order	References		Invoice			
Customer "	Responsible *					
400729	W Paul Launchbury	-				
CARMARTHEN TOWN COUNCIL	Salesman*					
Customer address	W Paul Launchbury	-				
CARMARTHEN TOWN COUNCIL ST PETERS CIVIC HALL NOTT SQUARE	Accountable	_				
	External reference					
	External order ID					
Default GL analysis						
Dates						
Order date 24/01/2018	iiii					
Order lines						
] # Status	Product Description	Quantity	Unit	Price	Curr. amount	Total curr. amount
Clear Open Event						
Clear Open Export						
						1000/

#### 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.

File Edit View Favorites Tools Help	it.aspx タマで U Simp	ole sales orders - Unit4		1	11	3 3	
<b>IIT4</b> Business World On!		✓ - 争 ✓ Carma	arthenshire County Co	oun 👻 👤 fpwl24	7 ~ 🌲 🗸 2	Search (Alt+q)	٩, ٨
Simple sales orders ×							♡?
Sales order Customer* 400729 CARMARTHEN TOWN COUNCIL Customer address CARMARTHEN TOWN COUNCIL ST PETERS CIVIC HALL NOTT SQUARE	References Responsible* W Paul Launchbury Salesman* W Paul Launchbury Accountable	• •	voice				
☆ Default GL analysis	External order ID						
Dates							
Order date 24/01/2018							
☆ Order lines							
# Status	Product Description	Quantity	Unit	Price	Curr. amount	Total curr. amount	
Save Clear Open Export							> 105% •
🚳 🙆 🔮 📑 🔯				🏡 📼 9	os 🗻 🔣 🔶 🖗	1 O O I T 10 4 2	12:32 4/01/2018

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.

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

T/ Ducinocc Wo	rld Opl			Com	arthonobiro County (	Cours of the form	1947	Carach (Altain)	
II4 Business wo	na On:			V +9 V Cam	narthenshire County (	Joun 👻 🧕 ipw	1247 🔍 🛄 🗸 🗹	Search (Alt+q)	
Simple sales orders	×								
									@ ♡
Dates									
Order date 24	/01/2018	-							
		C							
Order lines									
		Droduct	Description	Quantity	Unit	Price	Curr. amount	Total curr. amount	
#	Status	FIGURE							
Add Diote Reset	Status	rivuust							
Add Dete Reset	ormation	PIUUULA							
Add Diete Reset Additional product inf a GL Analysis # Account	ormation Attribute 1	Attribute 2	Attribute 3	Attribute 4 Attrib	rte 5 Attribute 6	Attribute 7	Tax code Pe	rcentage Amount	
Add Diete Reset Add Diete Reset Additional product inf GL Analysis # Account Split row	ormation Attribute 1	Attribute 2	Attribute 3	Attribute 4 Attribu	rte 5 Attribute 6	Attribute 7	Tax code Pe	rcentage Amount	
Add Diete Reset Add Diete Reset Additional product inf Colorational Split row	ormation Attribute 1	Attribute 2	Attribute 3	Attribute 4 Attribu	rte 5 Attribute 6	Attribute 7	Tax code Pe	rcentage Amount	

T/ Ducinocc )	World Opl				Cormorthonshiro Co	untu Coura da I	fourl247 v	A Commit (Altor)		0
Gusiness (	wond On:			••••	Carmar mensinire Co		ipwi247 • 🙀	Search (Alt+q	,	9
Simple sales or	ders ×									
										?
										,
ites										
der date	24/01/2018	-								
ci dute	24/01/2016									
)rder lines										
#	Status	Product	Description	Quantity	Unit	Price	Curr. amount	Total curr. amount		
1	N	* <u> </u>		0.00	•	0.00	0.00	0.00		
	NI.									
	N									
	N									
	N									
	N									
	N									
	N									
	N			000						
d Delete De				0.00			0.00	0.00		
d Delete Re	N eset			0.00			0.00	000		
d Delete Re	N set			0.00	,,,,,,,,		0.00	0.00		
d Delete Re	N set			0.00	,		0.00	0.00		
d Delete Re:	N isettinformation			0.00	,		0.00	000		
j Delete Re	N set :t information			0.00	,		0.00	0.00		
j Delete Re dditional produc	N set			0.00	,		0.00	0.00		
i Delete Re dditional produc iL Analysis # Accourt	N set tinformation	Attribute 2	Attribute 3 A	0.00 ttribute 4 Attri	opute 5 Attribute	6 Attribute 7	0.00 Tax code F	0.00 Percentage Amount		
i Delete Re dditional produc iL Analysis # Accour	N set tinformation nt Attribute 1 Open	Attribute 2	Attribute 3 A	0.00 ttribute 4 Attri	) Dute 5 Attribute	6 Attribute 7	0.00 Tax code F	0.00 Percentage Amount		
3 Delete Re: udditional produc 3L Analysis # Accour	N iset information nt Attribute 1 Open Expc	Attribute 2	Attribute 3 A	0.00 ttribute 4 Attrib	poute 5 Attribute e	6 Attribute 7	0.00 Tax code F	0.00 Percentage Amount		

Click the cursor into product field, if you know your product code key in the code or click is 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.** 

→ <mark>□</mark> http://u4bw Edit View Favor	webdev/U4BW_Web/Default.aspx ites Tools Help	u ۵ <del>-</del> ۵	Simple sales orders	- Unit4 ×	D.	- 🔁 i			- □ <mark>- ×</mark>
Business W	/orld On!		♥ × •9 ×	Carmarthenshire Cou	inty Coun 🗸	👤 fpwl247 🗸 🌲 ,	2 Sear	ch (Alt+q)	Q
Simple sales orde	ers ×								
									⌀♡?
							×		^
Value lookup									
Search criteri	a							0.00	
(									
	d								
N									
Produce	FEES*		Des	cription					
									_
Product grou	ip		Cost	t centre (CC)					
Service Code			Unit						
Warehouse									
Search									
Product	Description	Product arour	Cost centre	(CC) Service Code	Unit	Warehouse			
Troduct	Description	r roduct group	Cost centre	(CC) Service Code	Onit	Warenous		Amaunt	
							Filter	0.00	
FEES&COSTS	FEES & COSTS RECOVERABLE	KU604	3010	191	UN			0.00	
FEESCIVIL		R0363	7998	778	UN				
FEESCOED	& COSTS AT COEDCAE SO	CHOOL R0858	4050	165	UN				
FEESCOSHOUS	FEES & COSTS RECOVERABLE	HUUSING R0807	9201	050	UN				
FEESCOSTAS	FEES AND COSTS RECOVERAB	_E K8559 P7015	1351	256					
FFFSCOSTR	FEES AND COSTS RECOVERAB	F R8559	1352	520	UN				
FEESCOSTBUR	FEES & COSTS BURRY PORT PA	ARK R0463	7802	870	UN				
FEESCOSTCOM	FEES & COSTS COMMERCIAL S	ERV. R0835	8922	922	UN				
FEESCOSTCORE	FEES & COSTS RECOVERABLE	CORE R0378	1005	520	UN				
									>
									105%
							-		-

Click to select the correct product from the results list.

	Cimpol		rdoro M												
	Simple	e sales of	iders x											[	g
			27/01/20	10	1111									L	Ť
Dr	der lir	ies													
	#		Status	Proc	duct		Description	n	Quantity U	nit	Price Curr.	amount	Total curr.	amount	
	1		N	* FEES&COSTS		FEES	& COSTS RECC	OVERABLE	1.00 UN		150.00	150.00		180.00	
				FEES & COSTS RECO	OVERABLE										
									100			150.00		100.00	
d	Del		reat						1.00			150.00		180.00	
4	D	lete    D.	east						1.00			150.00		180.00	
	dition	late   D.	et informat	ion					1.00			150.00		180.00	
b	Idition	al produc	ct informat	ion					1.00			150.00		180.00	
d	Idition	al product	et informat	ion	Amour	ıt			1.00			150.00		180.00	
	Idition roduct	t t ext	et informat	ion	Amour	n <b>t</b> ount			1.00			150.00		180.00	
P	Idition roduct	lutu    R. Hal produc t ext	et informat	ion	Amour Curr. am	nt ount		150.00	1.00			150.00		180.00	
i P	Idition roduct t	t t ext	ct informat	ion Û	Amour Curr. am Tax perc	n <b>t</b> ount		150.00	1.00 Tax curr.amount		30.00	150.00		180.00	
	ldition roduct t	t t ext	et informat	ion O	Amour Curr. am	n <b>t</b> ount ent		150.00	1.00		30.00	150.00		180.00	
d P	Idition roduct t	t t ext	et informat	ion	Amour Curr. am	n <b>t</b> ount ent		150.00	1.00 Tax curr.amount		30.00	150.00		180.00	
i P P	Idition roduct t	tate   9.	et informat	ion	Amour Curr. am Tax perc	n <b>t</b> ount ent		150.00	1.00 Tax curr.amount		30.00	150.00		180.00	

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 <u>MUST</u> 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).

I =				armarthonshiro County Cour	• • € fow/247 •		Coarob (Alt+g)	
A Business world On:			••••	armartnensnire County Cour	1 ♥ <u>I</u> Ipwi247 ♥	₩ ✓ 🖬 :	search (Alt+q)	
Simple sales orders x								
								@ 🗸
$\frown$				1.00		150.00	180.00	
d Delete Reset								
Additional product information								
Product	<b>A</b>							
Product	Amoun							
Product text	Curr. amo	ount	150.00					
	V Tax perce	ent	00.00	Tax curr.amount	20.00			
			20.00		30.00			
GL Analysis	Costc	Jobcode	Hseinv	Service	Tax code	Percentage	Amount	
GL Analysis # Account				191	* S	, 00.00000	150.00	•
GL Analysis           #         Account           1         8559         501	.0			Additional Learning Needs - ich	AR Standard Rate	100.00	150.00	
GL Analysis # Account 1 8559 501 Fees & Costs Recover Beha	0 aviour Support Community Te							
GL Analysis # Account 1 8559 501 Fees & Costs Recover 501 Strenge	LO aviour Support Community Te				$\smile$	100.00		
GL Analysis  # Account  1 8559 501 Fees & Costs Recover Behr	LO aviour Support Community Te				$\smile$	100.00		
GL Analysis  # Account  1 8559 Fees & Costs Recover Behr Difference Ve Clear Open E:	0 aviour Support Community Te					100.00		

**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.

Period		Description	Next TransNo	
	201710	DO NOT USE - GARDEN WASTE SUBSC		441842
	201710	DO NOT USE - GLADSTONE SALES OR		441842
	201710	DO NOT USE - HOME IMPROVEMENT L		441842
	201710	DO NOT USE - LICENSING SUBSCRIPTI		441842
	201710	DO NOT USE - PIPER LIFELINE ONLY		441842
	201710	DO NOT USE - SUBSCRIPTIONS		441842
	201710	Normal Sales Orders		441842
	201710	Sales Orders Social Services		441842
	201710	Test number type		441842

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.