U4 ERP
Raising Sales Orders

Guide for Users

Version 1.0

sirgar.llyw.cymru
carmarthenshire.gov.wales

Cyngor Sir Gâr
Carmarthenshire County Council

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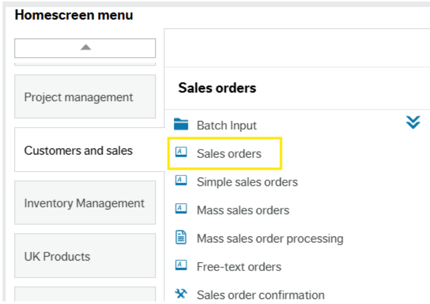
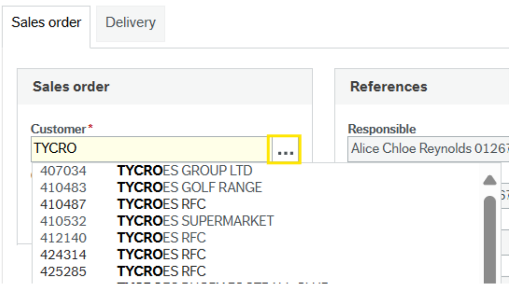
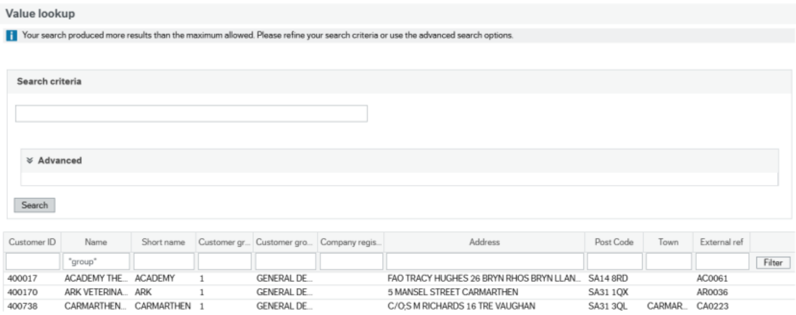
Raising a Sales Order



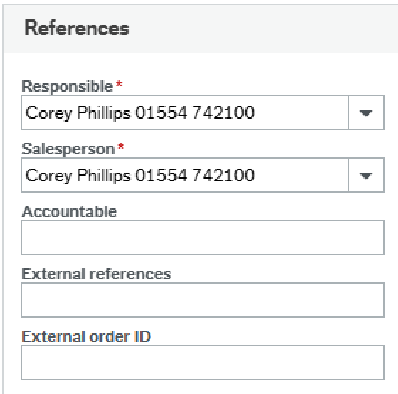
Open the *Customers and sales* menu on the left-hand side of the home screen. Under the *Sales orders* sub menu, open *Sales Orders*.

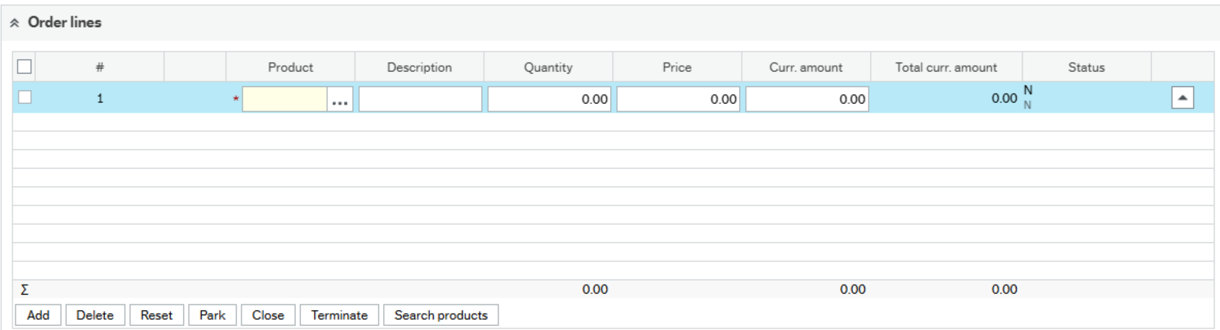
Start typing the customer's name into the *Customer* field, when you see the customer you require in the dropdown box, select it and press the TAB button. You may also use the value lookup window to find the customer by selecting the three dots next to the customer field, this will give you more of a variety of look-up options. If you cannot find the customer you are looking for, please contact FI Sundry Debtors.





The *Responsible* field is to show who is raising the sales order, this should remain as yourself.
The *Salesperson* field is to show a point of contact for the customer; this information will be placed on the sale order.
The *Accountable* field is to place a contact name at the company/organization if applicable
If the customer has given an order ID or reference number, you may enter then in the *External references* and *External order ID* field.

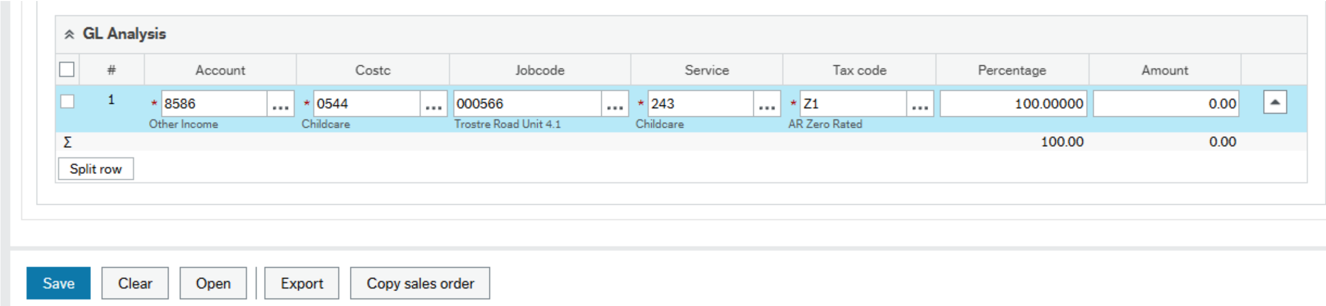




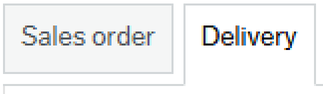
Click on the *Add* button to add a line to the sales order

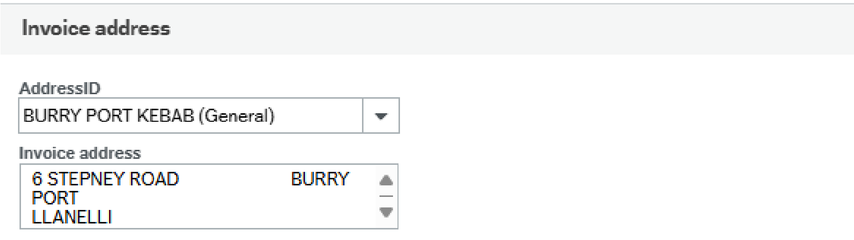
1. Click into the *Product* field and then choose the product either by name or code
2. Press TAB to move to description field, this field should fill automatically (add relevant information such as dates, etc here)
3. Press TAB and change quantity if required
4. Open the *Additional product information* box and input all the full details of the sales order e.g. full details, dates, times etc. The field is optional, but it is important that you populate it to avoid any queries that may delay payment.

5. Press TAB to go to price, this will either fill automatically or will need to manually be filled.



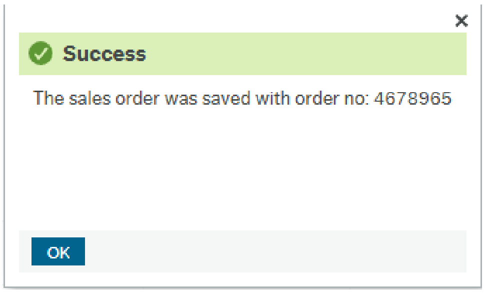
Scroll down to the GL Analysis box and double check that the coding is correct. Return to the top of the page and click the delivery tab





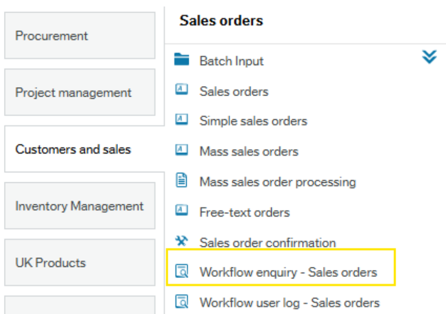
Check that the correct address is selected for the invoice address. If it needs to be changed, click the Address ID dropdown and select the correct name, after selecting the correct name press tab to change the invoice address.

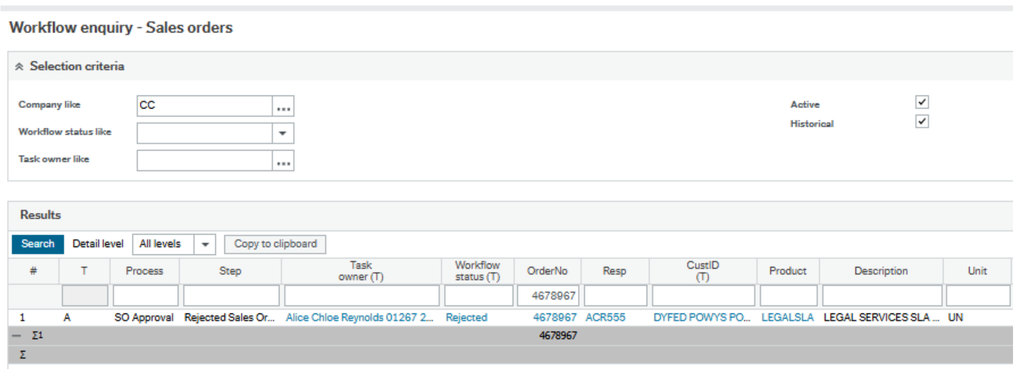
You may now save the sales order. If the system asks you to select a posting cycle, please ensure you select the correct one.
SO – Normal Sales Orders
SC – Sales Orders, Social Services
If successful, you will receive a sales order number. Please keep a note of this.



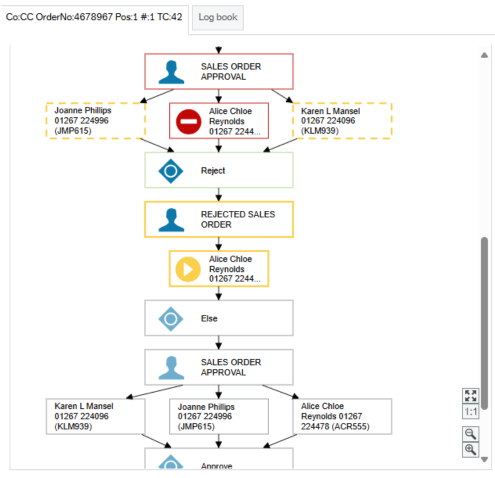
Sales Orders Enquiries

If you would like to find out where your sales order is sitting in workflow, use the Workflow Enquiry search. This is in *Customer and Sales – Sales Orders – Workflow Enquiry Sales orders.*

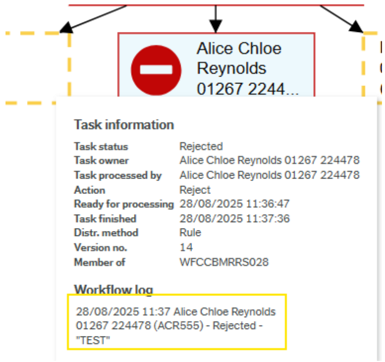




Enter your order number in the OrderNo field and press search. The results will show you who the order is currently sitting with and at what stage.

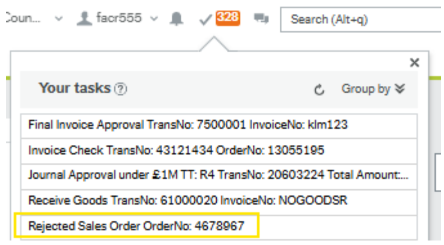


If you would like to investigate the workflow, click on the workflow status to see the workflow map. Here you will be able to see what stages the order has gone through and what is left. If the order has been rejected, you will be able to see the reason for this here too.



Actioning Rejected Sales Orders

The authoriser of the financial code may end up rejecting your sales order for whatever reason. You will receive an automated email with the sales order and a link that will take you to Unit4 WEB.
After logging in, open your tasks that are on the top right side of the menu and select the task called *Rejected Sales Order OrderNo: xxxx.*



If you would like to see the reason for rejection, please use the workflow enquiry (see above).

If you need to change the amount, amend this in the order lines field and then save. The sales order will then re-enter workflow.
If you need to change the code/product, you will need to delete the sales order and raise a new one. Please contact FI Sundry Debtors for more information.

Closing a Sales Order

If you require to close a sales order before it has been approved, please email FI Sundry Debtors.
If you require to close a sales order after it has been approved, you will need to fill in a Sales Order Cancellation form and have the budget manager email it to FI Sundry Debtors as a form of authorisation.

Further Queries

If you have any other queries regarding sales order or any accounts receivable related, please contact FI Sundry Debtors.