Introduction
This guide explains how to:

A. Create a sales order
B. Check the status of your sales order
C. Find out the invoice number for your approved sales order

Note that ALL sales orders MUST be raised through Business World.

Audience
Staff in Schools and Departments who are responsible for raising sales orders to external customers. This is typically for services provided (e.g. room or laboratory hire), or the sale of goods/equipment.

Process

A. Create a sales order

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>From the main menu select Customer and Sales, then Sales orders&gt; Sales orders. The Sales orders window opens.</td>
</tr>
<tr>
<td>2</td>
<td>Complete the Sales order tab. In the Customer field enter the customer ID, or type the customer name and select from the drop down.</td>
</tr>
<tr>
<td>3</td>
<td>Tab out of the field.</td>
</tr>
</tbody>
</table>
| 4    | Complete the other sections at the top:  
  a. Customer address - autopopulates when you tab out of the Customer field.  
  b. Responsible - person responsible for raising the sales order.  
  c. Originator - person who originates the sales order. Typically the Responsible and Originator are the same person. Will autopopulate to person creating the sales order.  
  d. Purchase Order No – customer’s PO number. If no PO, enter a contact name. |
If the customer organisation operates a PO system you MUST obtain a PO from them. Failure to do so will delay payment of the invoice.

5  Click **Add** in the **Order lines** section. A new line appears.

6  Enter details of the product:
   a. **Product** - choose a product group (starts PG). Enter the code or type ahead and select a product group from the drop down, then tab out. *Note: Be careful to select the correct option for VATable and NON-VATable services.*
   b. **Description** - clear the autopopulated text and enter the description.
   c. **Quantity** – number of units
   d. **Price** – unit price
   e. **Curr.amount** – auto-calculates value of the order.
   f. **Tax curr.amount** – VAT to be added if applicable (depends on product selected at step a.)
   g. **Total curr. amount** – total amount including VAT (if applicable).

- In the **Description** field you must clear the auto-populated text and enter a meaningful description. Whatever you type here will appear on the invoice.
- Some product groups have a VAT-able and non-VAT-able option (e.g. Sale of Goods, Room Bookings to Outside Bodies). If you select the VAT-able option VAT will be automatically added to the amount you enter in the **Price** field, so make sure you enter the NET amount.

7  **Additional product information** – use this box to provide additional information for the customer if required. Text entered here will be printed on the invoice.

8  Complete the GL Analysis:
   a. **Account code** - auto-populated from the product.
   b. **CostC** – autopopulated from the Subproject
   c. **Project** – autopopulated from the Subproject
   d. **Subproject** – the budget to which income will be credited to.
   e. **Detail** – select a category if obvious or leave as is.
   f. **Tax code** – autopopulated from the product. Do not change.
   g. **Tax system** – autopopulated from the product
   h. **Percentage** – of value to credit to subproject.
   i. **Amount** – total value of order
Business World Quick Reference S2002
Create a sales order

9 If required, click the Documents icon to attach any relevant documents to the order (e.g. original invoice for a recharge).

10 Click Save. A success message is displayed and the sales order is assigned a number.

11 Click OK.

What happens next?
The sales order is routed to the Income Team for approval. If approved a sales invoice is automatically generated from the sales order, and the invoice PDF is emailed to the customer.

B. Check the status of your sales order

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<tr>
<td>1</td>
<td>From the main menu select Sales orders then Workflow enquiry – Sales orders.</td>
</tr>
<tr>
<td>2</td>
<td>Click Search.</td>
</tr>
<tr>
<td>3</td>
<td>Locate your order in the list. You can either filter by OrderNo or by Responsible person. Note: there is a separate line for each approver.</td>
</tr>
<tr>
<td></td>
<td>Click any of the Workflow in progress links in the Workflow status (T) column.</td>
</tr>
<tr>
<td>4</td>
<td>The workflow map displays. Click Close to close window and return to the Workflow enquiry window.</td>
</tr>
<tr>
<td>5</td>
<td>To review the order itself repeat steps 1-3 but this time click the order number link in the OrderNo column.</td>
</tr>
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C. Find out the invoice number for your approved sales order

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<tr>
<td>1.</td>
<td>From the main menu select <strong>Reports</strong>, then <strong>Customer &amp; Sales</strong>&gt;<strong>Sales Orders (Invoices)</strong>&gt;<strong>Approved sales orders</strong>. The <strong>Approved sales orders</strong> window opens.</td>
</tr>
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</table>

![Image of a computer screen showing the sales order menu]

2. Click **Search**. A list of your own approved sales orders will be displayed.

3. Find the sales order in the list (filter on the **OrderNo** if required). The **Invoice Number** is displayed next to the **OrderNo**.

![Image of a computer screen showing the search results]

Where to go for help
Contact the Income Team on extension 6365, or email cashiers@bbk.ac.uk