Introduction
This guide explains how to create a sales order.

Note: ALL sales orders must be raised through Business World.

Audience
Staff who raise sales orders.

Process

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 ahead then select the customer from the drop down.</td>
</tr>
<tr>
<td>3</td>
<td>Tab out of the field.</td>
</tr>
</tbody>
</table>
| 4    | Complete the rest of the Sales order section:  
  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. Customer’s PO or other reference number. If no PO, enter a contact name. |
| 5    | Click Add in the Order lines section. A new line appears. |
6 Enter details of the product:
   a. **Product** - choose a product group. Enter the code or type ahead and select product from the drop down.
   b. **Description** - auto-populated when you tab out of the Product field. Can be over-typed.
   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).

Some product groups have a VATable and non-VATable option (e.g. Sale of equipment, Room bookings to outside bodies). If you select the VATable option VAT will be automatically added to the amount you enter in the Price field, so enter the net amount.

7 Enter details in the **Additional product information** box if necessary

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. Enter code or type ahead.
   e. **Detail** – leave as is
   f. **Tax code** – autopopulated from the product. Do not change.
   g. **Tax system** – autopopulated from the product
   h. **Percentage** – of amount to credit to subproject.
   i. **Amount** – total value of order
   j. **Split row** – click to split order across two or more subprojects.

9 Click the **Open documents** icon to attach any relevant documents to the order (e.g. original invoice for a recharge).
Click **Save**. A success message is displayed and the sales order is assigned a number.

Click **OK**.

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

**View the sales order in workflow**

<table>
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<tr>
<td>1</td>
<td>From the main menu select <strong>Sales orders</strong> then <strong>Workflow enquiry – Sales orders.</strong></td>
</tr>
<tr>
<td>2</td>
<td>Click <strong>Search.</strong></td>
</tr>
<tr>
<td>3</td>
<td>Locate your order (see <strong>OrderNo</strong> column). Note: there will be a separate line for each approver.</td>
</tr>
<tr>
<td>4</td>
<td>Click any of the <strong>Workflow in progress</strong> links in the <strong>Workflow status (T)</strong> column.</td>
</tr>
<tr>
<td>4</td>
<td>The workflow map displays. Click <strong>Close</strong> to close window and return to the <strong>Workflow enquiry</strong> window.</td>
</tr>
<tr>
<td>5</td>
<td>To re-open the order repeat steps 1-3 then click the order number link in the <strong>OrderNo</strong> column.</td>
</tr>
<tr>
<td>6</td>
<td>If you update the order click <strong>Save</strong> to save your changes and re-submit the order to workflow.</td>
</tr>
</tbody>
</table>

**Where to go for help**

Contact the Income Team on 020 3907 0700 (option 3), or email cashiers@bbk.ac.uk