Introduction
This guide explains how to amend a sales order in task manager, after it has been rejected by the Income Team.

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.

Step | Action
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1. | Click the Task icon in the toolbar and select the relevant task (Rejected Sales Order OrderNo: 30000XX...).
|  | The Sales orders window opens.

2. | Review the Income Team’s comment in the Workflow log.

3. | Amend as required (any white cell in the Order lines or GL Analysis section can be amended)
|  | The Product code is read-only on this screen. If you need to edit it:
|  | 1. Check the box to the left to select it
|  | 2. Click Terminate to close off the existing line
|  | 3. Click Add to add a new line. Re-enter the details with the correct Product code.

4. | When you’ve made your changes click Save. A confirmation message is displayed.
5. | Click OK.
6. | Close the Rejected Sales OrdeNo: .... window

What happens next?
The amended sales order is routed back 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.

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