

Budget Holder Tasks: Sales Order

Tasks can be found in the top right corner of the screen:



When you click on the Tick, a list of outstanding tasks will be displayed. This example shows the user has three tasks to action.

Click on the task to view the order

Budget Holder Approval (Sales) OrderNo: 917425

Sales order approval

Order information

Customer name	Liverpooljazz	Status	To invoice
OrderNo	917425	Responsible	Louis Raschke
Order date	2/22/2019	Salesman	Louis Raschke

Default GL analysis

OK

Order details

Map	Status	Currency	Curr. amount	Tax curr. am.	Total curr. a.	Price	Quantity	Unit	Product	Description	Status
<input type="checkbox"/>		GBP	-2,000.00	0.00	-2,000.00	-2,000.00	1.00	UN	OTHERINC	-£2000 Credit N...	N

Approve Reject OK but amount to be changed Undo

Product Text / Description

Workflow log (row 1)

2/22/2019 2:25 PM Louis Raschke (LRASCH) - Distributed

[Enter a comment]

Copy

GL Analysis

Map	Status	Account	Costc	Project	Asset	Tax code	Percent	Amount	Tax system
<input type="checkbox"/>		* 8908	...	* OICB	...	* SBU05001	...	* SE	...
		Other Income	Capstone Building	SBU Capstone Building- ...		Sales Exempt R...	100.00000	-2,000.00	
Σ								100.00	-2,000.00

Approve Reject OK but amount to be changed Undo

Save

Annotations:

- A blue paperclip shows that supporting documents are attached. Click on the paperclip to view them.
- A comment must be entered in the workflow log for all rejected lines. To copy a comment to all ticked lines click on **Copy**.
- Approve or reject using **these** buttons
- Save when done
- NB:** Approve/Reject buttons in GL Analysis will action only the selected (blue) line, no matter how many lines are ticked.

Approve / Reject: Select the line(s) to be actioned and click approve or reject button as required.

Only the highlighted line (blue) will be actioned unless you select multiple lines using the boxes to the left of the lines, before clicking on Approve or Reject.

If the order amount is wrong, it cannot be changed here. Click **OK but amount to be Changed**, and enter the correct amount in the workflow log comment. The Order will not return to the originator but will progress through the workflow, to the Accounts Receivable team, who will make the amendment as required.

Rejected order lines will be returned to the administrator for them to amend and resubmit or reject.

A Sales Invoice will not be generated until ALL LINES have been actioned.