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1. Enter a Sales Order

Customers and Sales > Sales Orders > Sales Order Entry

Sales Order Entry ×										
Sales Order Entry Sales order										
Sales order	References		Invoice							
Customer* Responsible* Safton Education Authority Image: Customer address Setton Education Authority External references Setton Education Authority Image: Customer address Setvices Image: Customer address Services provided Image: Customer address Setvices Services provided										
# Prod	ict Description	Quantity	Price	Curr. amount	Total curr. amount	Currency				
1 * OTHERINC Other income	Services provided	1.00	130.00	130.00	156.00) GBP	-			
Save Clear Open Export	Copy sales order									

- Enter the *Customer* ID directly, or start typing the customer name until the customer appears in the drop-down box.
- **External references** are optional. The customer's PO number or any other purchase reference may be entered here. This prints on the sales invoice.
- *Invoice Summary* is mandatory. Text entered here will not print on the sales invoice but it will show against the U4ERP transaction, and will appear on reports and enquiries.
- To enter an *Order line*, click on the first line below the header row.
- To enter a product start typing in the *Product* field to display valid products. If the product code is not known, open the Value lookup window ... and search with the nominal account code.
- Overtype the default *Description* with the detail of the order. *This appears on the final invoice and needs to be as comprehensive as possible.*
- Enter the *Quantity* for the item.
- Enter the item *Price*. For credit notes enter the price as a minus value.
- The *Total Curr amount* field will show the line total (including VAT if the tax code is SS).
- *Additional product information* (per order line) can be used to enter additional text which will appear on the invoice.
- The *GL Analysis* (per order line) is at the bottom of the screen and shows the GL account (*Product*), and the users default cost centre. Amend the **Costc** as required.
- Enter a valid *Project* code for the cost centre.

- Amend the tax code to SE if the line is to be net of VAT.
- The Workflow log (per order line) can be used to enter a comment for the approver. This does not appear on the printed invoice.
- Click on *Add*, or on the next line, to add further lines if required, and repeat as above.
- Click on *Save* when done and ensure you are given an Order number.

2. Attach Support Documents

You can add attachments to your order **before** you save it. These will be printed by Credit Control and sent out with the invoice.

Click on the paperclip icon in the top right corner of the screen



- Click on the **Upload** button to find a document on the network.
- Double click document, or select and **Open**
- Add a brief *Document description* and *Save*.

B GL Journal Transfers User Guide.pdf	25/08/2021 15:51	
Goods receipting.pdf	19/08/2021 13:27	×
Raising a requisition.pdf	19/08/2021 13:3:	Add a document (?)
Raising New Suppliers on U4ERP.pdf	17/08/2021 13:26	
Reporting on the Web.pdf	25/08/2021 15:46	Document type * ?
Using U4ERP web.pdf	19/08/2021 13:28	Sales Order Attachments
M AV - E 11- J - E	20/00/2021 15:2. ¥	
		File name*
 All Files (*.*) 	~	Upload
Open	Cancel	Document title *
		Document description
		Save

- Select Add a Document again to add further documents.
- To exit click the *x* in the top right corner of the document pop-up screen.

3. Copy a Sales Order to create a new Order

If the details of a new sales order are similar to one already entered, you can copy an existing order and amend as necessary.

- Click on *Open* in the bottom left corner of the *Sales Order Entry* screen.
- In the *Value lookup screen* enter the order number, customer number, or user name in the search criteria to locate the order.
- Click on Copy Sales Order, in the bottom left corner of the *Sales Order Entry* screen, to make a copy.
- Amend the copy as required.
- Attachments are not copied to the new order. You will need to attach documents which are required as back up for the new order.