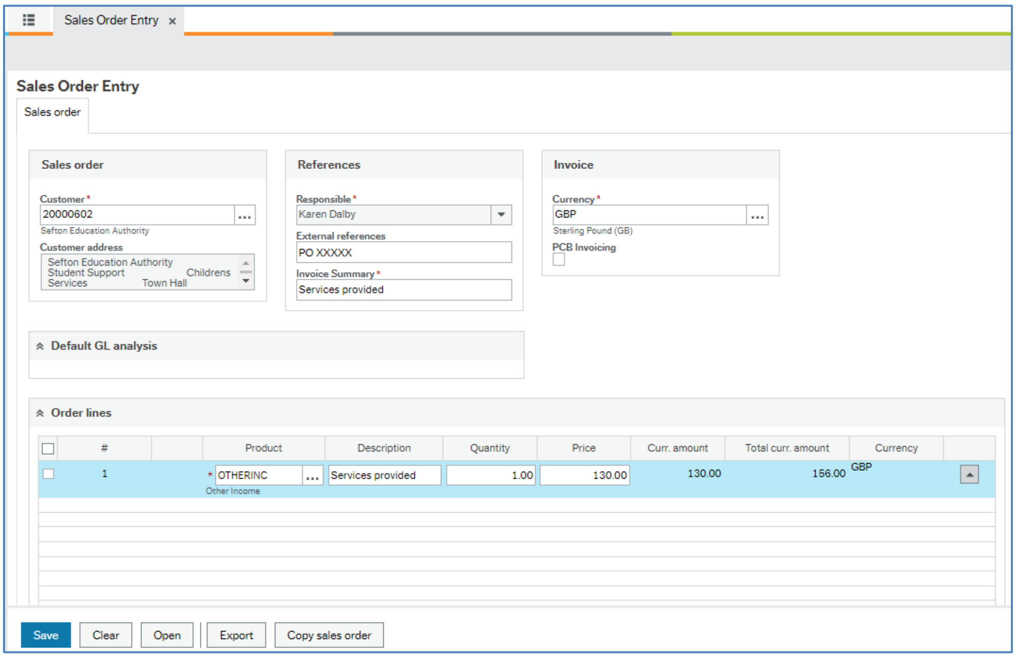
# Contents



## 1. Enter a Sales Order

***Customers and Sales > Sales Orders > Sales Order Entry***

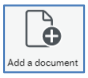


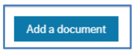

- Enter the ***Customer*** ID directly, or start typing the customer name until the customer appears in the drop-down box.
- ***External references*** are optional. The customer's PO number or any other purchase reference may be entered here. This prints on the sales invoice.
- ***Invoice Summary*** 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.

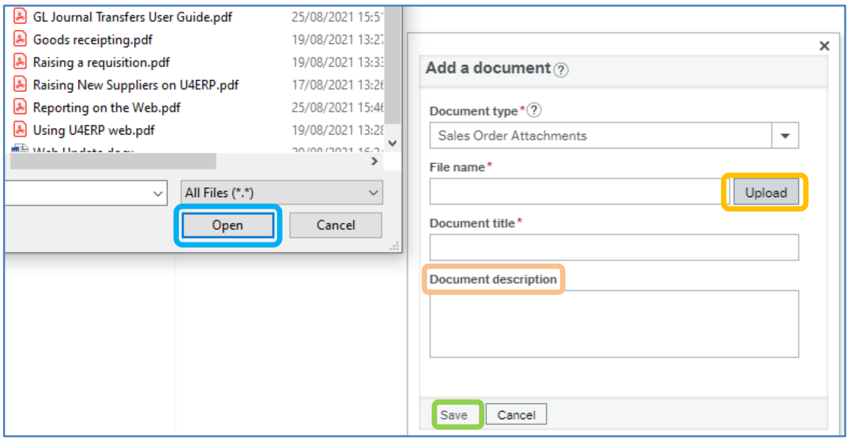
## 2. Attach Support Documents

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 
- Select either 

or 

- 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***.




- 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.**