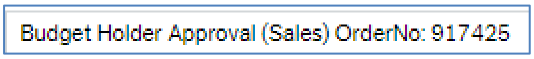
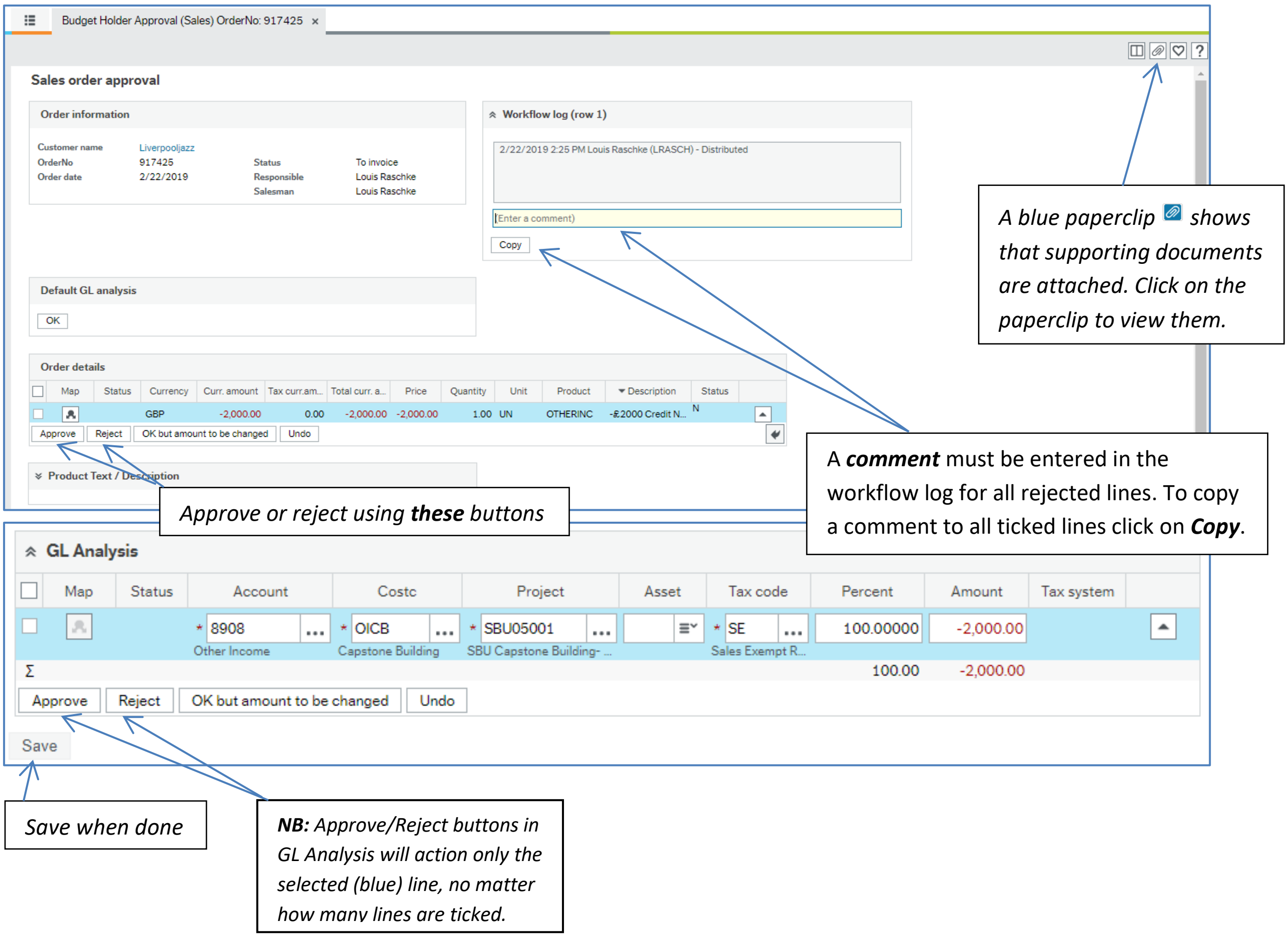
Budget Holder Tasks: Sales Order

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 



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.**