

SOP8: Closing a Sales Order/Credit Note

In Agresso the option to close a Sales Order/Credit Note must follow a particular process.

Before the Sales Order/Credit Note is closed it <u>MUST</u> be rejected back to the person who raised the Sales Order/Credit Note. The person who raised the Sales Order/Credit Note will get a Sales Order/Credit Note amendment email reminder letting them know they will have a amendment task. This will allow them to close the Sales Order/Credit Note.

Any attempts to close the Sales Order/Credit Note during the approval process can lead to system errors.

Once the Sales Order/Credit Note is closed it cannot be re-opened.

SOP8.1: Terminating the Sales Order/Credit Note

1. To access the Rejected taskscreen:



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				×
			Your tasks	
			Sales Order Amendments OrderNo: 8005872	
		,		

Or choose to go to Go to Task management where all you will be able to view all yours sorted according to , type of task and importance, due date.

The following screen will appear:



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ordonito									
		8005872							
Sales or	der		References	Invoice					
* Custom	er	_	* Salesman	Currency					
630868			Ian Brown 👻	GBP Sterling Pound (GB)					
Allos Acade	emy		* External order ID	Sterning Found (GD)					
Bowhous	e Road		credit note						
FK10 1DI United Ki	N Alloa nadom								
* Order ty	pe								
Sales Cre	edit Notes		-						
* Status									
To invoice	e		-						
Delivery	1								
Immuni	ing davet								
♦ IIIVO	ice text								
Dates									
Order dat	e	11/06/201	5 🔝						
× Order I	iries								
#		Status	Product	Description	Quantity	Price	Curr. amount	Tax curr.amount	
		N	SALES102	Credit note	1.00	-150.00	-150.00	0.00	
		N	Short/ vocational courses - non accredited CPD	oroditrioto	1.00	100.00	100.00	0.00	
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Save	Clear	Open	Export						
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7. Change the status of the st	ne Sales Order/Credit Note to T	ERMINATED						
OrderNo 8005872								
Sales order	References	Invo	ice					
* Customer 630868 Alloa Academy Bowhouse Road FK10 1DN Alloa United Kingdom * Order type Sales Credit Notes * Status Terminated	* Salesman lan Brown * External order ID credit note	Curre GBP Sterlin	ncy g Pound (GB)					
8. To Save the changes on the Save button at the bottom of the screen Save								
The sales order was saved	red with order no: 8005872							

8. The task should leave you're a few minutes later.