

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 MUST 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 an amendment task. This will allow them to close the Sales Order/Credit Note.

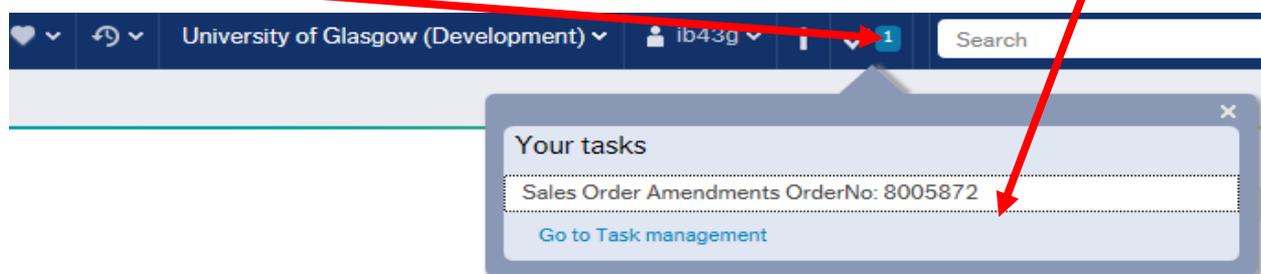
Any attempts to close the Sales Order/Credit Note during the approval process can lead to system errors.

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:

✓ 1 Clicking on the task icon opens the task list preview where you can directly select a task.



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:

8005872

Sales order

* Customer
630868
Alloa Academy
Alloa Academy
Bowhouse Road
FK10 1DN Alloa
United Kingdom

* Order type
Sales Credit Notes

* Status
To invoice

References

* Salesman
Ian Brown

* External order ID
credit note

Invoice

Currency
GBP
Sterling Pound (GB)

Delivery

Invoice text

Dates

Order date 11/06/2015

Order lines

#	Status	Product	Description	Quantity	Price	Curr. amount	Tax curr.amount
1	N N	SALES192 Short/ vocational courses - non accredited CPD	Credit note	1.00	-150.00	-150.00	0.00

Save Clear Open Export

2. Click on the  to see why the Sales Order/Credit Note was rejected.

Workflow log (row 1)

11/06/2015 15:43 Ian Brown (IAN) - Distributed
11/06/2015 17:16 Margaret Sutherland (MSUTHERLAND) - Rejected - "No credit to be given"

(Enter a comment)

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3. Check the Workflow log **Workflow log (row 1)** to see what changes are required for the Sales Order/Credit Note.

4. In this manual the option is to Terminate the Sales Order/Credit Note:

5. Select all the rows of the Sales Order/Credit Note

Order lines

#	Status	Product	Description	Quantity	Price	Curr. amount	Tax curr.amount
<input checked="" type="checkbox"/> 1	N N	SALES192 Short/ vocational courses - non accredited CPD	Credit note	1.00	-150.00	-150.00	0.00
Σ				1.00		-150.00	0.00

Add Delete Reset Park Close Terminate

6. Select the **Terminate** option.

Order lines

#	Status	Product	Description	Quantity	Price	Curr. amount	Tax curr.amount
<input checked="" type="checkbox"/> 1	T T	SALES192 Short/ vocational courses - non accredited CPD	Credit note	1.00	-150.00	-150.00	0.00

7. Change the status of the Sales Order/Credit Note to TERMINATED

OrderNo
8005872

Sales order	References	Invoice
* Customer 630868 Alloa Academy Alloa Academy Bowhouse Road FK10 1DN Alloa United Kingdom	* Salesman Ian Brown * External order ID credit note	Currency GBP Sterling Pound (GB)
* Order type Sales Credit Notes		
* Status Terminated		

8. To Save the changes on the Save button at the bottom of the screen

Save Clear Open Export

✓ The sales order was saved with order no: 8005872

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