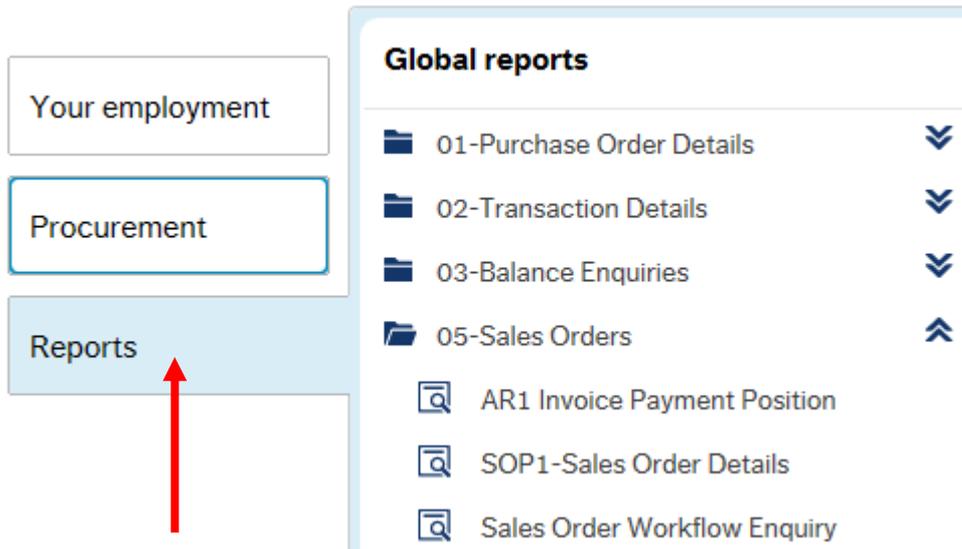## Sales Order Workflow Enquiry

In Agresso there is a specific browser enquiry that allows you to check the approval process for Sales Order or Credit Notes.

To open the specific Enquiries go to:

Select Reports

At the top of the menu screen click on:
Select Reports

📁 05-Sales Orders

🔍 Sales Order Workflow Enquiry

1. The following screen will be displayed:

To search for information please enter the required details into above fields:

Then click Search to view the results

The   results   will   then   appear   or   depending   on   the   search   criteria
*N.B If no results will be shown please check the search criteria entered*

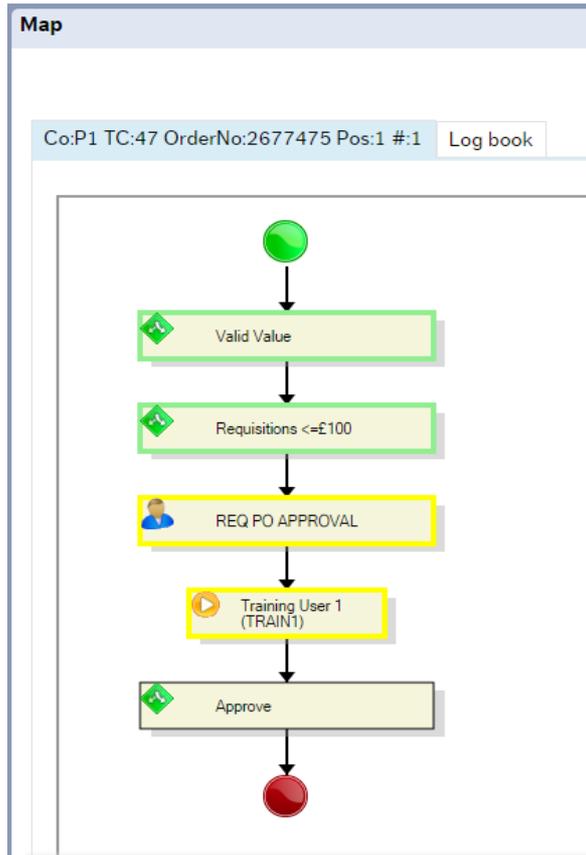**2.** These are the descriptions of the fields:

Step	- The Process stage of the Workflow
Process	- The type of Process
Task Owner	- The person with whom the task is
Workflow Status (T)	- The status of the of the Workflow – To see the workflow map click on this field (for more information see below)
OrderNo	- The Sales Order Number.
Customer ID.	- Customer ID
Product	- The Product code selected.
Description	- Description of the product ordered
Account	- The Account Code related to the Sales Order
Costc	- The Cost centre Code related to the Sales Order
Sub- Project	- The Sub-Project related to the Sales Order
Ordered	- The Quantity ordered.
Amount	- The price of the item ordered (before VAT)

Workflow Map

To view the Workflow Map of the approval process of the Task click on the Workflow Status
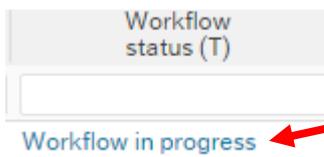
This will open a new screen with a Map showing each person who has to approve the Task or has approved the task.

Map

Co:P1 TC:47 OrderNo:2677475 Pos:1 #:1 | Log book

```
        ●  (start)
        │
        ▼
   ◆ Valid Value
        │
        ▼
   ◆ Requisitions <=£100
        │
        ▼
   👤 REQ PO APPROVAL
        │
        ▼
   ▶ Training User 1
      (TRAIN1)
        │
        ▼
   ◆ Approve
        │
        ▼
        ●  (end)
```

The highlighted areas in yellow show the parts of the workflow that need to be processed.

If the process has a green tick – the person has completed their process

If there is a Full Stop – The task has been Rejected

Place your cursor over the Workflow stage to see more information regarding each stage.

If the Workflow Map says 'ITEMS TO FOLLOW UP' please contact the Agresso support desk:

finsup@glasgow.ac.uk