

QL Finance Portal - Sales Invoice Request

Eliminate the need to re-key paper-based documents.

The Agresso QLF Web Portal was originally introduced as a means of delivering desired, distributed access using browser-based technology. The system was developed to be more appropriate to the needs of occasional users, extremely flexible, yet simple to deploy. Of course, it conforms to all the business rules and restrictions defined within the core Agresso QLF system.

The main element of the Agresso QLF Web Portal is made up of a series of Web Parts. Each Web Part provides an important piece of functionality - in much the same way as a Workbench in core Agresso QLF does.

Sales Invoice Request

There are numerous occasions where departments require a sales invoice to be created by the central finance department for services provided. Although it is unlikely that the finance department would ever want to devolve this process in its entirety, there is good reason to allow the departmental user in question to provide all the details electronically so that re-keying from paper-based documents is eliminated. If required, the finance department can then view, amend, decline or authorise the request as appropriate.

The Sales Invoicing web part effectively delivers this electronic sales invoice request functionality.

A look-up and search filter facilities are provided to aid the user to select the correct customer. If the customer does not exist the user can follow the account request procedure. The user's contact details will be attached to the request to help the finance department if they need to contact the originator.

The screenshot shows a web form for creating a sales invoice request. It contains several sections:

- Customer Information:** Customer (00000648), Document Date (11/04/2011), B/R To Address (00000850), Customer Reference, Contact No (01792 524524), Ext (645), and Contact Email (email@deabi distinction-systems.co.uk).
- Product and Pricing:** Product (LPR), Description (Lost book), UOM (Each), Qty (1), FREE (15.00), VAT Code (175), VAT (2.63), Value (15.00), and Gross (17.63).
- GL Account:** 0101.010.9400.

Both product codes and free text requests can be entered. If product codes are used the system can default all the information leaving the user to simply enter the quantity. If free codes are used, all information needs to be entered but look-ups are provided to help the user and ensure data validity. The general ledger code look-up will display only the codes the user has access to. Once the user is happy with the request it can be submitted to the finance team to authorise.

Contact Us

For more information on Sales Invoice Request, or any of our Education-specific solutions, please contact us on:

T: 01275 377210

E: info.uk@unit4.com

www.unit4software.co.uk

About UNIT4

UNIT4 is a global business software company that creates, delivers and supports adaptable software and services worldwide, to help dynamic organisations manage their business needs effectively. We strive to set the global standard for business solutions that help dynamic organisations to embrace change – simply, quickly and cost effectively.

We have a broad portfolio of solutions that address different markets, requirements, technologies and types of organisation; the UNIT4 group incorporates a number of the world's leading change-embracing software brands, including the Agresso Business World ERP suite and CODA financial management software. UNIT4 has offices in 13 European countries and 6 countries across North America, Asia Pacific and Africa (as well as sales activities in several other countries) for easy, local access to service and support.



UNIT4 headquarters

www.unit4software.co.uk

Copyright © UNIT4 Business Software Limited.

All rights reserved. The information contained in this document is intended for general information only, as it is summary in nature and subject to change. Any third-party brand names and/or trademarks referenced are either registered or unregistered trademarks of their respective owners.

Cardale Park, Beckwith Head Road
Harrogate HG3 1RY, United Kingdom

T +44 (0) 1423 509999 **F** +44 (0) 1423 530525
E info.uk@unit4.com

UNIT4 Business Software Limited

Registered UK Addresses

St. George's Hall, Easton-in-Gordano
Bristol BS20 0PX, United Kingdom

T +44 (0) 1275 377200 **F** +44 (0) 1275 377201
E info.uk@unit4.com