# Direct Sales Order Entry - Existing Customer

#### **Overview**

## **NIS Policies**

The tasks in this documentation provide end users with the tools to enter data and collect data in NIS. It is the responsibility of the agencies to comply with State Statutes, Federal Rules and Regulations, and State policies. For further information concerning State Statutes and policies, please refer to both internal agency resources and the Department of Administrative Services website: <a href="http://www.das.state.ne.us/">http://www.das.state.ne.us/</a>.

## **Navigation**

NIS State of Nebraska > Sales Order Mgmt > CSI > Sale Order Entry > CSI Sales Entry > Sales Order Entry Non-Agency (SO) (If the customer is a Non-Agency (SO)), or Sales Order Entry Agency (SI) (If the customer is an Agency (SI))

#### Steps

Start this instruction from the Customer Service Inquiry window.

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st	omer S	Service 1	nquiry	Additu	onal Sele	ections									
	Order 1	Number			•		81	•		Branch/Plant		•			
	Custor	ner PO			•										
	item N	Number •													
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1. Click Add. The Enter Sales Order – Sales Order Header window appears.

r Sales Order - Agency (SI) - Sales Order Header Cancel Egem Tools	0
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	Branch/Plant
Messages Address Numbers	Order Date Cancel Date Cancel Date
Sold To Ship To	Requested Date Requested Time
Customer PO Print Mossage Hold Code BLANK-HOLD CODES 426HC Tax AraBiCode .	Price Pickstip Invoice Copies Ordered By Taken By

- 2. Complete the following fields:
  - **Branch/Plant** enter 46070025 (this B/P will never change)
  - Ship To enter the address book number for the facility to which the item(s) should be shipped. The number entered in this field will default to the Sold to field, but can be overridden if necessary. Use the visual assist (magnifying glass) if needed.
    - Non-Agencies (SO) will have an Address Book <u>search type</u> of "C & the Address Book number will begin with a "5"
    - State Agencies (SI) will have an Address Book <u>search type</u> of "F", the alpha name will begin with "CSI" & their Address Book number will begin with a "6"
  - **Cancel Date** enter 30 days from today (expiration of Quote)
  - Ordered By enter the customer name, ex. Miss Fran
- 3. Click **OK**. If a Yellow Warning appears; review the Sales Quote to be sure all information is correct.

Cancel Form Lools	ener (en				
<mark>farnings</mark> es (click each label for Review Order Header	more information): Data Before Accept	<u>Go to warning .</u>			
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Messages			Branch/Plant 460700	04/12/2007	
			Cancel Date		
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4. Record the Sales Quote (SQ) number (i.e. 271).

- 5. Notice other fields have populated.
- 6. Click **OK** again to accept all Sales Order Header information. The Sales Order Detail Revisions window appears.

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7. Click **Form, Header Commissions.** The Sales Order Header Commission Lookup window appears.

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20 Enter Sales Order - Age	ncy (SI) - Sales C	)rder Header Commis	sion Lookup		
OK Delete Cancel Iools					
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Sales Rep or Group	Commission Percentage	Flat Commission Amount	Per Unit Amount	Comm Code Type	
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- 8. Enter the Sales Rep address book number. Use Visual Assist, if needed.
- To use the visual assist, click the magnifying glass to the right of the field. Enter a B in the Search Types field and click Find. Locate the name of the Sales Rep, choose the row, and click Select. The name will appear in the field.
- 9. Click **OK** to return to the Sales Order Detail Revisions window.

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- 10. Complete the following fields in the grid below:
  - Quantity Ordered
  - Inventory Number
- 11. Click in the next blank row and enter additional lines if needed.

- A yellow warning may appear and other fields may populate after clicking in the next row. Click **OK**.
- 12. Record the quote number and click **OK**. The Enter Sale Quotes Order Acceptance Screen Appears.

A Taxable customers must be identified prior to this screen.

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13. To **revise** Order you must click the **Revise Order Button** to return to the Sales Order Detail Revision Screen.

To **complete** the Sales Quote, click **Place Order**. The Sales Order Header window appears.

Cancel Form Tools	u u
der Number	
Grder Header Additional Header Information	71 71
	Branch/Plant
Messages	Dates
Address Mushare	Order Date
Sold To	Requested Date
Ship To	Requested Time
Customer PO	Price Pickslip
Print Message .	Invoice Copies

- 14. Repeat steps 2 14 to enter additional quotes.
- 15. Click Cancel.
- 16. Click Close. You will return to the menu.