

# Direct Sales Order Entry - Existing Customer

## Overview

## NIS Policies

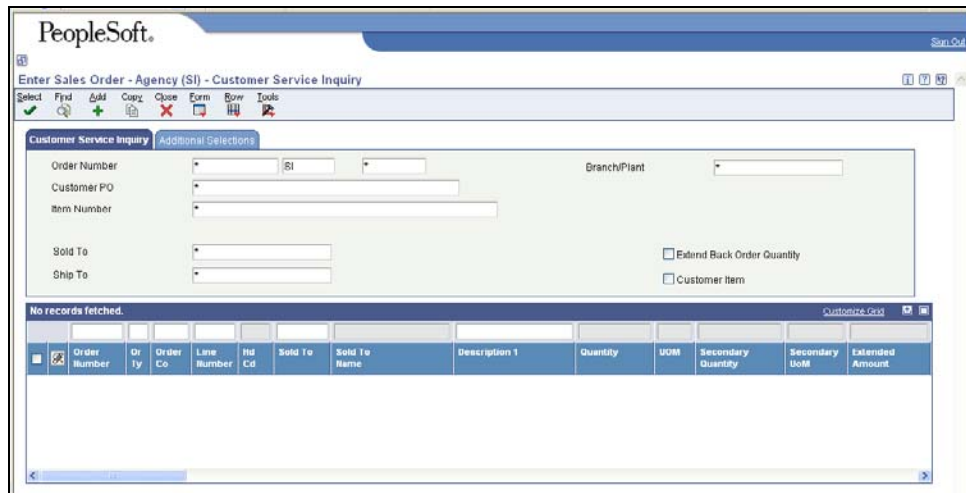
The tasks in this documentation provide end users with the tools to enter data and collect data in NIS. It is the responsibility of the agencies to comply with State Statutes, Federal Rules and Regulations, and State policies. For further information concerning State Statutes and policies, please refer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

## 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.



Order Number	Or Ty	Order Co	Line Number	Hd Cd	Sold To	Sold To Name	Description 1	Quantity	UOM	Secondary Quantity	Secondary UoM	Extended Amount
No records fetched.												

1. Click **Add**. The Enter Sales Order – Sales Order Header window appears.

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 search type of “C” & the Address Book number will begin with a “5”
  - State Agencies (SI) will have an Address Book search type 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.


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.


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

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.

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.

 Taxable customers must be identified prior to this screen.



PeopleSoft

Enter Sales Order - Agency (SI) - Order Acceptance

Order Number: 3131 | SI: 62510

Sold To: 605960 | CSI - ABSTRACTERS BD OF EXAMIN

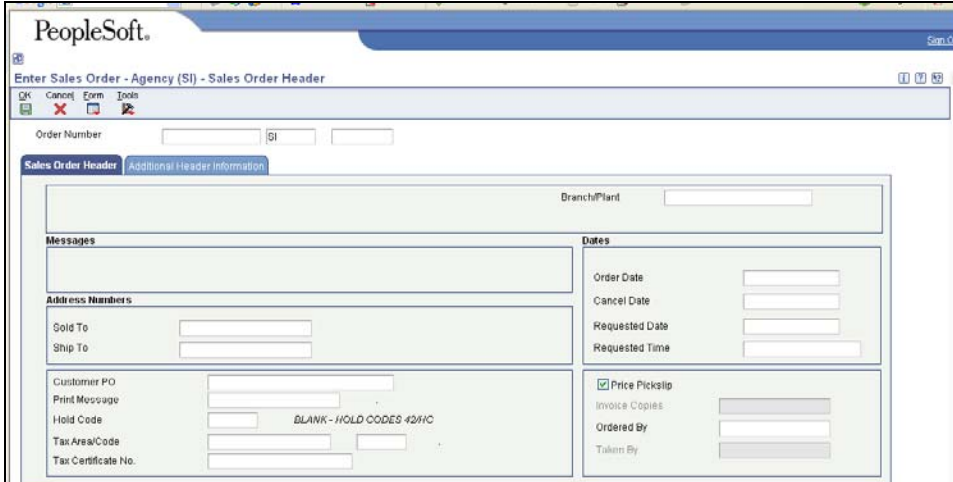
Ship To: 605960 | CSI - ABSTRACTERS BD OF EXAMIN

Inventory Number	Description	Order Date	UM	Quantity	Extended Price	Tax	Line Number	Ln Ty	Quantity Shipped	Quantity Backorders
42506-TF-CR-150-604	INDIANA EXEC CHARCOAL	04/12/2007	EA	5,000	1,090.00	Y	1,000	S	5,000	
Order Total ...						1,090.00				
Taxable Amount @ Tax Rate 0 %						1,090.00				
INVOICE TOTAL						1,090.00				

Place Order | Revise Order

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.



PeopleSoft

Enter Sales Order - Agency (SI) - Sales Order Header

Order Number: [ ] | SI: [ ]

Branch/Plant: [ ]

Messages: [ ]

Address Numbers:

Sold To: [ ]

Ship To: [ ]

Dates:

Order Date: [ ]

Cancel Date: [ ]

Requested Date: [ ]

Requested Time: [ ]

Customer PO: [ ]

Print Message: [ ]

Hold Code: [ ] | BLANK - HOLD CODES 424/C

Tax Area/Code: [ ]

Tax Certificate No.: [ ]

Price Pickslip

Invoice Copies: [ ]

Ordered By: [ ]

Taken By: [ ]

OK | Cancel | Form | Tools

14. Repeat steps 2 - 14 to enter additional quotes.

15. Click **Cancel**.

16. Click **Close**. You will return to the menu.