

Confirm Status Change to Sales Order Documents

Overview

Sales Order Documents are tied to Statuses. As changes are made to the documents (i.e. printing) the Last Status & Next Status fields will update to reflect the changes. Status changes occur in both Quotes (as shown in below screenshot) & Sales Orders.

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 > Sales Order Entry > CSI Sales Quotes > Enter Sales Quotes (SQ)

OR

NIS State of Nebraska > Sales Order Mgmt > CSI > Sales Order Entry > CSI Sales Quotes > Enter Sales Order

Steps

The screenshot shows the 'Enter Sales Quotes (SQ) - Customer Service Inquiry' window. The 'Order Number' field contains '271' and the document type is 'SQ'. The 'Find' button is highlighted in the top toolbar. The left sidebar shows the navigation path: State of Nebraska > Sales Order Mgmt > CSI > Sales Order Entry > CSI Sales Quotes > Enter Sales Quotes (SQ). The main form area contains fields for Customer PO, Item Number, Sold To, and Ship To. The status bar at the bottom indicates 'No records fetched.'

1. Click Enter Sales Quotes (SQ) or Enter Sales Order (i.e. above screenshot is for a Quote)
2. Enter Document Number (i.e. 271)
3. Click Find

Enter Sales Quotes (SQ) - Customer Service Inquiry

Customer Service Inquiry Additional Selections

Order Number 271 SQ * Branch/Plant *

Customer PO *

Item Number *

Sold To * Extend Back Order Quantity

Ship To * Customer Item

Records 1 - 3 Customize Grid MissFran

Line Number	Order Number	Or Ty	Last Status	Next Status	Order Co	Hd Cd	Sold To	Sold To Name	Description 1	Extended Amount	Quantity
1.000	271	SQ	540	580	52510		606056	CSI - DAS BUILDING DIM	2200 DESK WALNUT 72	1,200.00	2.0000
2.000	271	SQ	540	580	52510		606056	CSI - DAS BUILDING DIM	INDIANA EXEC CHARCO.	872.00	4.0000

-  **Last Status 540** (Print to Customer) & **Next Status 580** (Release Bid/Quote)
 -  After Quote is converted to an order, the Quote will become **Last Status 999** (complete)
 -  Detail lines can be modified any time prior to being converted into a Sales Order
4. Click **Close** to exit Quote