

Generate Sales Order from Sales Quote

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 > Sales Order Entry > CSI Sales Quotes > Generate Agency Sales Order (SI) from Quote (SQ)

OR

NIS State of Nebraska > Sales Order Mgmt > CSI > Sales Order Entry > CSI Sales Quotes > Generate Non-Agency Sales Order (SO) from Quote (SQ)

Steps

The screenshot shows the PeopleSoft EnterpriseOne interface. The main window title is "Generate Agency Sales Order (SI) from Quote (SQ) - Work With Order Blanket Release". The "Order Number" field contains "271" and the "SQ" type is selected. The "Find" button is highlighted. The left navigation menu shows the path: Sales Order Mgmt > CSI > Sales Order Entry > CSI Sales Quotes > Generate Agency Sales Order (SI) from Quote (SQ).

1. Click Generate Agency Sales Order from Quote (SQ)

It is imperative you select correct sales order TYPE before converting or else it will need to be entered all over again

- SO = Sales Order for NON-AGENCY Customers (A/B # begins with 5)
- SI = Sales Order for STATE AGENCY Customers (state agencies A/B # begins with 6)

2. Enter SQ number (i.e. 271) & click "Find"

Order Number	Or Ty	Order Fd	Line Number	Hd Cd	Sold To	2nd Item Number	Request Date	Quantity Open	Qty Ind	UM	Branch/Plant	Unit Price
271	SQ	52510	1.000		606056	42521-TF-DK-2200-1	01/24/2007	2.0000	EA		46070025	600.0000
271	SQ	52510	2.000		606056	42506-TF-CR-150-604	01/24/2007	4.0000	EA		46070025	218.0000

The Quote you previously entered is displayed

The “Quantity Open” & “Qty Ind” (indicator) field

3. Check the first detail line box & click “Select”

If you get a Yellow Warning click “OK” twice (this means the qty exceeds what is available)

Top portion indicates overview of order for this specific line

The Quote number will automatically default in this field

Bottom portion indicates “Release Quantity” (this is the total quantity requested by the Customer).

- Fill in “Request Date” with appropriate date based on normal CSI lead times for this type of merchandise. Engineering will need to verify this date & advise if it needs to be modified
- Click “OK”

Order Number	Or Ty	Order Fd	Line Number	Hd Cd	Sold To	2nd Item Number	Request Date	Quantity Open	Qty Ind	UM	Branch/Plant	Unit Price	Sh Nu
271	SQ	52510	1.000		606056	42521-TF-DK-2200-1	01/24/2007		*	EA	46070025	600.0000	
271	SQ	52510	2.000		606056	42506-TF-CR-150-604	01/24/2007	4.0000		EA	46070025	218.0000	

 "Qty Ind" (qty indicator) field has been marked with an asterisk to indicate info has been reviewed

Generate Agency Sales Order (SI) from Quote (SQ) - Work With Order Blanket Release

Select Find Close Form Row Tools

Order Number 271 | SQ | *

Added Order

Order Number	Or Ty	Order Fd	Line Number	Hd Cd	Sold To	2nd Item Number	Request Date	Quantity Open	Qty Ind	UM	Branch/Plant	Unit Price	Sh Nu
271	SQ	52510	1.000		606056	42521-TF-DK-2200-1	01/24/2007		*	EA	46070025	600.0000	
271	SQ	52510	2.000		606056	42506-TF-CR-150-604	01/24/2007	4.0000		EA	46070025	218.0000	

6. Select next detail line box & click "Select" (repeat previous steps)

7. When all detail lines have been reviewed & have an asterisk in "Qty Ind" field, click "OK"

 If you get a Yellow Warning click "OK" again

Generate Agency Sales Order (SI) from Quote (SQ) - Work With Order Blanket Release

Select Find Close Form Row Tools

Order Number 271 | SQ | *

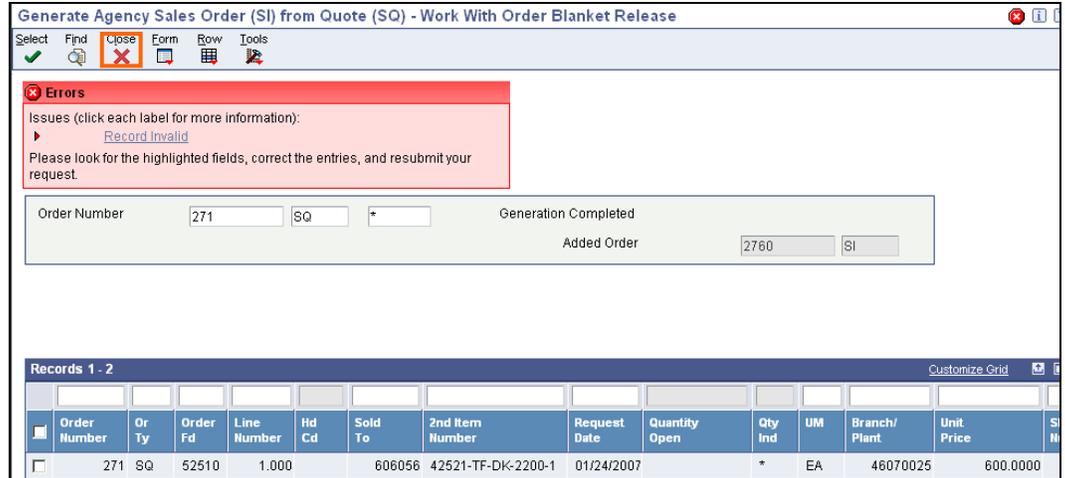
Added Order

SO Generation
Customer Service
Cancel Generation

Order Number	Or Ty	Order Fd	Line Number	Hd Cd	Sold To	2nd Item Number	Request Date	Quantity Open	Qty Ind	UM	Branch/Plant	Unit Price	Sh Nu
271	SQ	52510	1.000		606056	42521-TF-DK-2200-1	01/24/2007		*	EA	46070025	600.0000	
271	SQ	52510	2.000		606056	42506-TF-CR-150-604	01/24/2007		*	EA	46070025	218.0000	

8. When all lines have asterisks go to "Form", SO Generation.

 It is not necessary to check each detail line before clicking Form/SO Generation since Form refers to the entire order anyway.

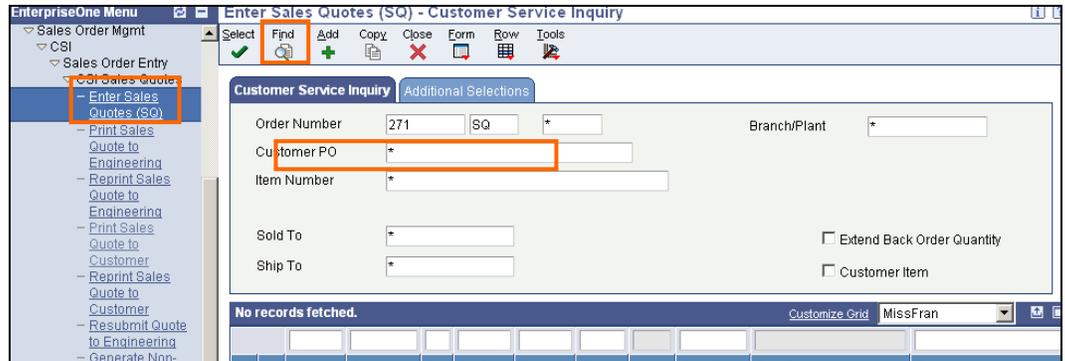


 You may get a Red Record Invalid Error – *Do Not Be Alarmed.*

The Quote has been converted to a Sales Order – i.e. 2760 SI as shown in above screenshot.

9. Click “Close.”

To validate what you just entered, do the following:



10. Go back into Enter Sales Quotes & put in SQ number.

11. Click “Find.”