

## Enter Sales Quote

### Overview

Use this instruction to create a sales quote (SQ) for a stock item for either an existing or new customer.

### 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/>.

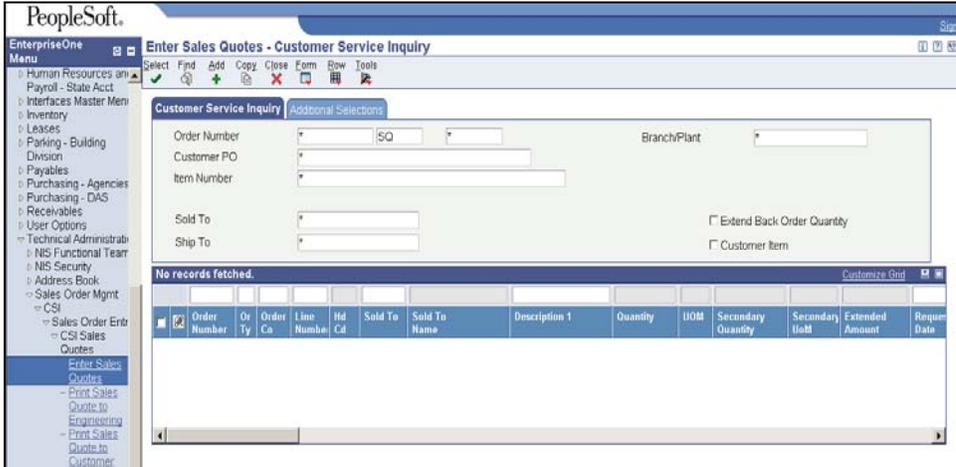
### Navigation

NIS State of Nebraska > Sales Order Mgmt > CSI > Sale Order Entry > CSI Sales Quote > Enter Sales Quotes (SQ)

### Steps

Start this instruction from the Enter Sales Quotes – Customer Service Inquiry window.

-  If this quote is for a new customer, a new address book number will need to be created during the Quote process.



Order Number	Order Ty	Order Ca	Order Lim Number	Hd Ct	Sold To Name	Description 1	Quantity	UOM	Secondary Quantity	Secondary Item	Extended Amount	Request Date
No records fetched.												

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

Enter Sales Quotes (SQ) - Sales Order Header

Order Number: SQ 52510

Branch/Plant: 46070025

Messages

Address Numbers

Sold To: [ ]

Ship To: 606056 CSI - DAS BUILDING DIVISION

Customer PO: [ ]

Print Message: [ ]

Hold Code: [ ] BLANK - HOLD CODES 42/HC

Tax Area/Code: [ ]

Dates

Order Date: [ ]

Cancel Date: 02/24/2007

Requested Date: [ ]

Requested Time: [ ]

Price Pickslip:

Invoice Copies: [ ]

Ordered By: MISSFRAN

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.

Enter Sales Quotes (SQ) - Sales Order Header

Order Number: 271 SQ 52510

Branch/Plant: 46070025

Messages

Address Numbers

Sold To: 606056 CSI - DAS BUILDING DIVISION

Ship To: 606056 CSI - DAS BUILDING DIVISION

Dates

Order Date: 01/24/2007

Cancel Date: 02/24/2007

Requested Date: 01/24/2007

Requested Time: 0

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.

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**. The Sales Order Detail Revisions window appears.

 If this is an existing customer, proceed to step 10. If this is a new customer, the Order Address for the Quote must be changed. (Once an Address Book number is created, the Quote will need to be revised before generating a

Sales Order.) To confirm the new customer Order Address transferred from the Sales Quote (SQ) to the Sales Order (SO or SI), complete the following steps:

- ◆ From the Sales Order Detail Revisions window, click **Form, Order Address**. The Order Address Information window appears.
- ◆ In the Address Type section, click the **Ship To** radio button.
- ◆ Change the following fields:
  - Mailing Name
  - Address Line 1
  - Postal Code
  - City
- ◆ Change other fields as necessary.
- ◆ In the Address Type section, click the **Customer** radio button.
- ◆ Make the same changes made to the Ship To address.
- ◆ Click **OK** to return to the Sales Order Detail Revision window.

10. Complete the following fields in the grid below:

- **Quantity Ordered**
- **Inventory Number**

 When entering a quote for engineering you must use the generic custom number for the type of furniture being quoted.

Example: Desk – 42521-G-DK-999 –

(For testing/training the item number is: 42521-TG-DK-999)

 A drawing or a sketch number may be referenced as an attachment

 Note to customer – if they order this item again, and a drawing/sketch number is available; they must indicate the drawing number for future Sales Quotes.

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.

Inventory Number	Description	Order Date	UOM	Quantity	Extended Price	Tax	Line Number	Ln Ty	Quantity Shipped	Quantity Backordered	Quantity Cancelled	Unit Price
42506-TF-CR-150-804	INDIANA EXEC CHARCOAL	10/24/200	EA	10.0000	2,180.00	Y	1.000	S	10.0000			218.0000
42521-TF-DK-2200-1	2200 DESK WALNUT 72G36	10/24/200	EA	5.0000	3,000.00	Y	2.000	S	5.0000			600.0000
Order Total . . .					5,180.00							
Taxable Amount												
@ Tax Rate@ %												
Freight Charges												
INVOICE TOTAL					5,180.00							

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.

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

15. Click **Cancel**.

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

Status of Sales Quote:

Last Status	Description	Next Status	Other 1
520	Enter Bid/Quote	540	560
540	Sent to Engineering	560	580
560	Sent to Customer	580	
580	Release Bid/Quote	999	
999	Complete - Ready to Purge		

