Service Sales Orders

Overview

The Entry of Service Sales Orders is a 4 step process that includes:

- Creating an Order – This can be entered and reviewed from the Shop Floor or Business Office.
- Approving the Order – This will be done by the CSI Business Office.
- Invoicing the Order – This will be done by DCS Accounting Department.
- Updating the Order – This will be done by DCS Accounting Department.

There are only 2 Document Types that can be created with a Service Sales Order:

- SO – Non-Agency (C = Customer) – This Customer will receive a Traditional Invoice.
- SI – Agency   (F = Facility) - This Facility will receive an Internal Billing Transaction (IBT).

There are a variety of services provided by CSI that require Service Sales Orders:

- TSCI & NSP Laundry Billings
- NCCW Data Entry Services
- Warehouse Services (Pick-up, delivery, storage, restocking fees, etc.)
- Bar-None inmate hours billing
- Print Shop Services (finishing, padding, collating, punching, etc.)
- Braille Shop Services (writer repair, large print books, etc.)
- Road Crew and other miscellaneous service billings
- Private Venture Services:
  - Garner Industries inmate hours billing
  - Yik Yak inmate hours billing
  - Yik Yak CNC cut-outs, finishing, etc.
  - Oriental Trading re-packaging operations
  - Sillosocks geese and components
 - Daitron, Vahallen Papers, State Teez products

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/.
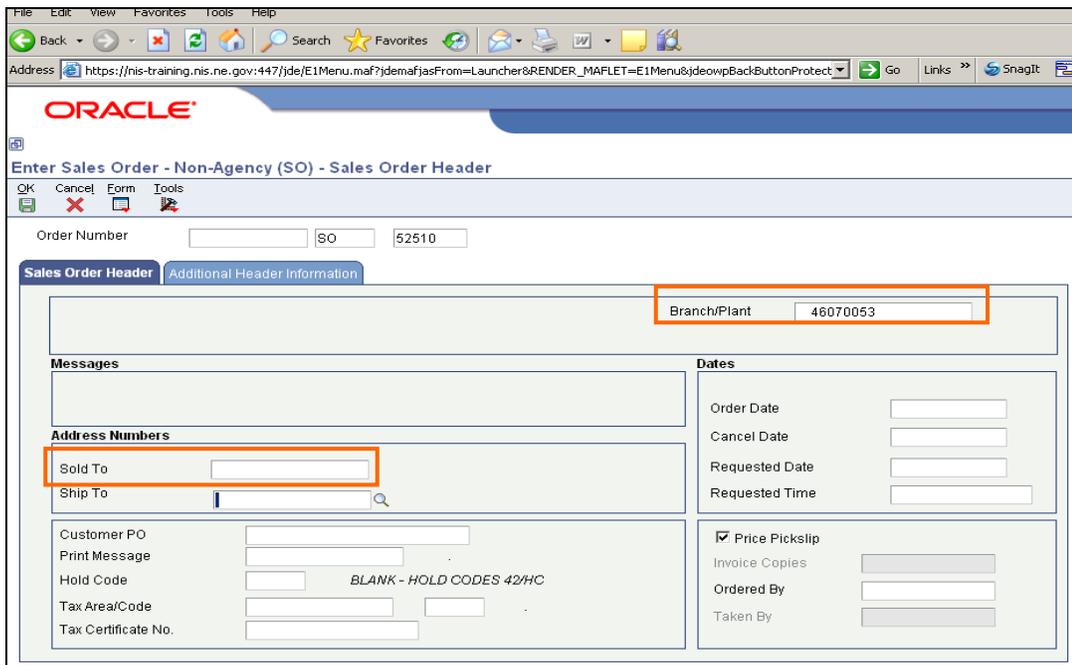
Navigation

NIS State of Nebraska > Dist & Mfg-Agencies > Dist & Mfg-CSI > Sales Order > Quotes & Order Entry > CSI Sales Entry

Steps
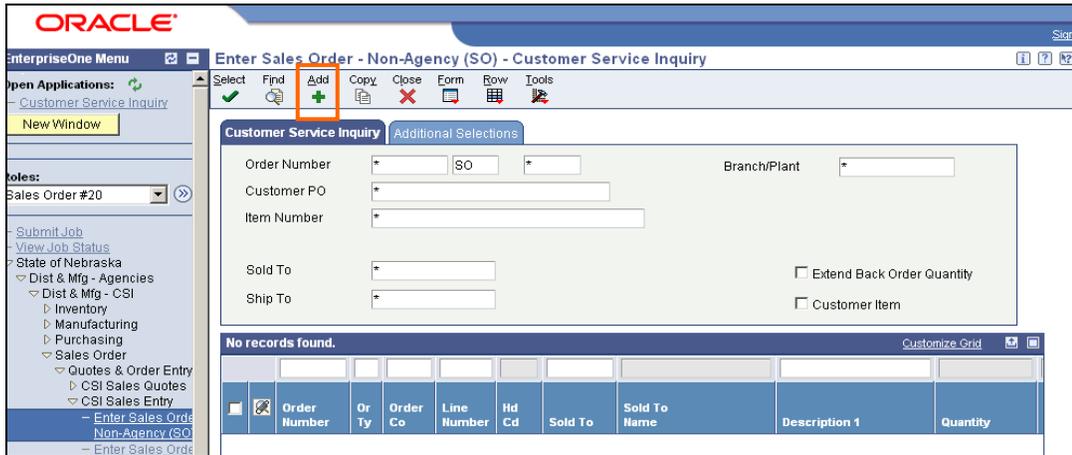
1. Click **Add** which will advance you to the Header screen below:

2. Enter in the **Branch/Plant** field the **Shop Business Unit** which will be billing the customer.

3. Tab to **Ship To** field. Use visual assist to find **SO Customer**.

Address Book Long Number Search

| Select | Find | Close | Tools |

Name Search   CSI*   ☐ Display Phone

Search Type   C   CUSTOMERS

No records found.   Customize Grid

			GARNER		
Address Number	**Sch Typ**	**Tax ID**	**Alpha Name**	**Mailing Name**	**Address Line 1**

4. Enter **CSI*** in the **Name Search** field.

5. Enter C in the **Search Type** field because this is an outside vendor, not a State entity.

6. Type the customer name in the **Alpha Name** field.

7. Click **Find**. This gives you customer information to determine if you have the right customer.

8. Click **Select.**

Address Book Long Number Search

| Select | Find | Close | Tools |

Name Search   CSI*   ☐ Display Phone

Search Type   *

Records 1 - 1   Customize Grid

			GARNER		
Address Number	**Sch Typ**	**Tax ID**	**Alpha Name**	**Mailing Name**	**Address Line 1**
565995	C		CSI - GARNER INDUSTRIES INC	GARNER INDUSTRIES INC	PO BOX 29

9. You will be returned to the Header screen and the **Ship To** address field will be populated with the customer's address number.

10. Tab to **Customer PO** field and enter the Customer's PO number or other unique number that is appropriate to identify the service provided. If you have no customer provided reference, use a date for the appropriate time period.

11. Click the green **OK** disc.

🖊 You will receive a yellow warning message that tells you to review the order before you continue.

🖊 Also note that the **Sold To** address has been populated with the same address book number as the **Ship To** address.

🖊 In addition, the **Order Date** and the **Requested Date** fields have also been populated with today's date.

🖊 You will also see your **Order Number** populated at this point in the process.

12. Click on **Form Exit** and select **Order Address**. This will move you to the SO Order Address Information Screen.

13. Review the Customer Ship To information. Click the customer address radio button and review the Customer Number information. For SO customers, this will not be likely to change.

14. Click the Green **OK** disc and you will be returned back to the Header screen with the yellow warning.

15. Click the Green **OK** disc and you will now move to the SO Detail Revisions screen.

16. On the records lines, enter quantity of the service and tab to the **Inventory Number** field and enter your Item.

17. If you do not know your Inventory Number, use the visual assist to help.

18. Select the radio button of the Item Number you need, and click the green **Select** icon.

19. This will return you to the SO Detail Revision screen and will have populated the Inventory Number field. Click anywhere on the second row of the Records detail and the first row will populate with additional information from the Item Master.

✎ Your Unit of Measure, Unit Price, Extended Price may be populated from the Item Master. If the price or other data is not populated from the Item Master, enter appropriate information now. You may also enter additional detail lines.

20. Click the green **OK** icon.

21. You are now moved to the SO Order Acceptance screen. You may review your order at this screen and you have the option of revising your order by clicking the yellow **Revise Order** button. This will take you back to the SO Detail Revision screen and you may change most variables. You may also delete a line completely using the **Row Exit**, **Bypass New Line**.

22. If you are satisfied with the Order you may click the yellow **Place Order** button and you will be returned to the original Sales Order Header screen.

23. After you click **Place Order** you will see the Order Number that you just completed in the "Previous Order" field. You may begin to enter another new (SO)Service Sales Order, or you may click the **Cancel** icon to exit the Header screen.

Enter Sales Order - Non-Agency (SO) - Sales Order Header

OK   Cancel   Form   Tools

Order Number [   ] SO [   ]

Sales Order Header | Additional Header Information

Previous Order [4178] [SO] [52510]   Branch/Plant [   ] 🔍

Messages   **Dates**

[   ]   Order Date [   ]

Address Numbers   Cancel Date [   ]

Sold To [   ]   Requested Date [   ]

Ship To [   ]   Requested Time [   ]

Customer PO [   ]   ☑ Price Pickslip

Print Message [   ] .   Invoice Copies [   ]

Hold Code [   ] *BLANK – HOLD CODES 42/HC*   Ordered By [   ]

Tax Area/Code [   ] [   ] .   Taken By [   ]

Tax Certificate No. [   ]