Quick Reference	Enter Sales Order - Non-Agency (SO)

Remember to use the Visual Assist 🔍 to search for information.

To	Do This
Enter Sales Order - Non-Agency (SO)	## Document Types SO – Non-Agency Sales Order (C = Customer) SI – Agency Sales Order (F = Facility) ## Navigation Sales Order #NN > State of Nebraska > Dist & Mfg-Agencies > Dist & Mfg-CSI > Sales Orders > Quotes & Order Entry > CSI Sales Entry > Enter Sales Order - Non-Agency (SO) ## Steps 1. Click **Add.** 2. Enter your Shop BU in the **Branch/Plant** field. 3. Tab to **Ship To** field and the enter customer number, or use visual assist to find the customer number. ⚠ Be sure that you select a Customer C, and not a Facility, F. 4. Tab to **Customer PO** field and enter a customer PO# that is appropriate. 5. Click **OK.** 🖊 **Sold To** populates with the **Ship To** customer. Also **Order & Requested Dates** populates with today's date. 6. Yellow review warning is given. Click **Form** > **Order Address**. 7. Verify the **Ship To** address. Click the **Customer** radio button. Click **OK.** 8. Click **OK** again to clear the yellow review warning and move to detail entry screen. 9. Enter **Quantity of Service** (inmate hours, billing units). 10. Enter the **Inventory Number** or use visual assist to find the information. 11. Click the next line to populate the remaining fields of line 1. 🖊 The billing price, extended price is populated. If Price is not auto-populated, enter manually. 12. Scroll to find **Description 2**. Enter additional detail for second line on the invoice. 13. Click **OK**. 🖊 Ignore yellow warning **.** 14. Review completed order and click **Place Order** or **Revise Order**. 🖊 Write down the order number (SO). 15. You are now ready to place new order, or click **Cancel** to exit. 16. Click **Close** to exit application.