ENTERING MANUAL ORDERS

MFG

QUICK REFERENCE GUIDE

Purpose

The purpose of this Quick Reference Guide (QRG) is to provide a step-by-step guide for ***entering manual orders*** in the North Carolina Financial System (NCFS).

Introduction and Overview

This QRG covers the process for creating and managing manual sales orders in NCFS, including entering order details, adding attachments, and saving draft orders for processing.

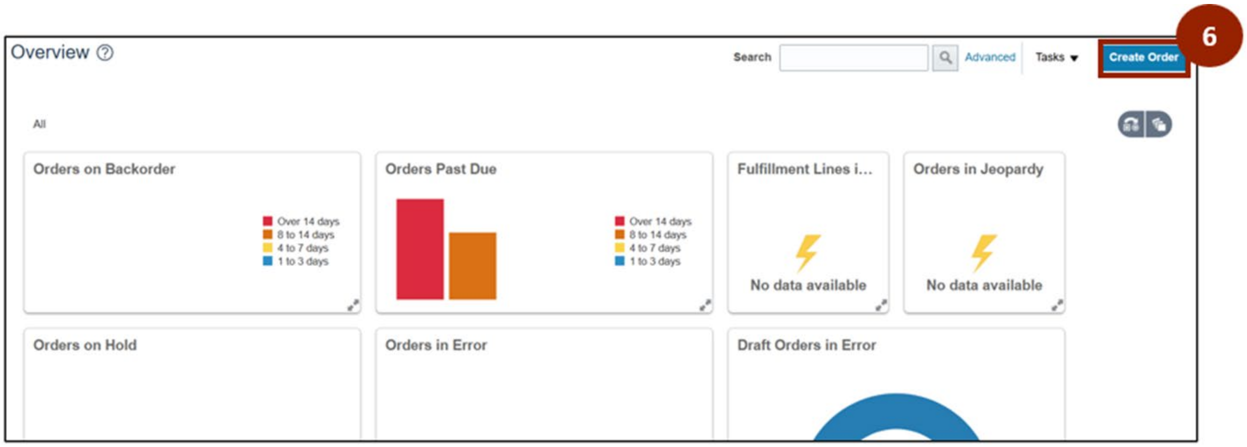
Create Order Screen: Headers Information

1. Click the **Company Single Sign-On (SSO)** button.
2. Enter your **dac.nc.gov** email address.
3. Click **Next**, then enter **password.**
4. On the ***Home*** page, select the **Order Management** tab.
5. Click **Order Management App.**

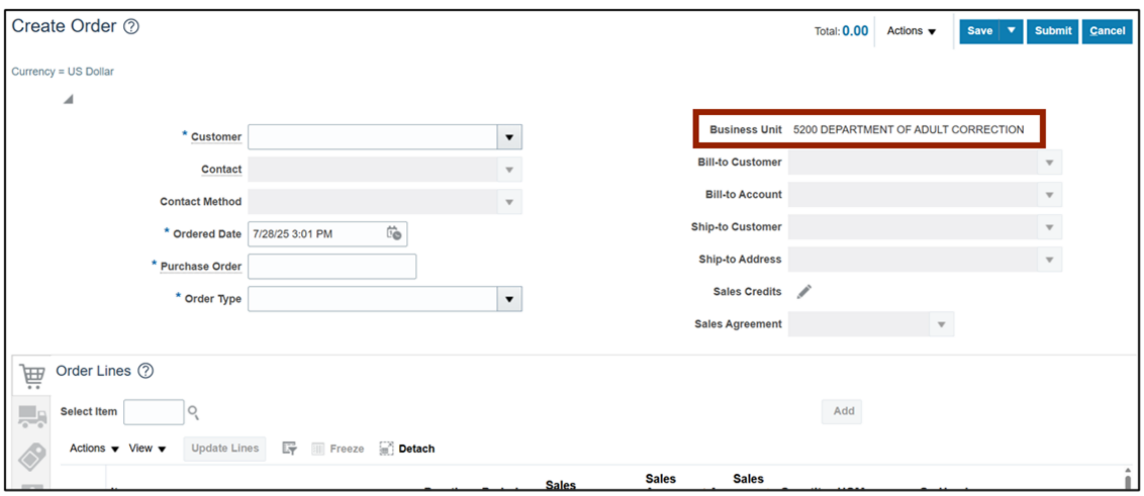
Note: The ***Order Management Overview*** screen displays information visually, providing data for DAC. As orders are created and progress, the diagrams and values will populate on this screen. If it is a new instance, this screen displays with minimal information.

6. Click the **Create Order** button.

Note: The ***Create Order*** screen displays, allowing DAC to create an order by manually completing the NCFS *Header* fields at the top of the screen.



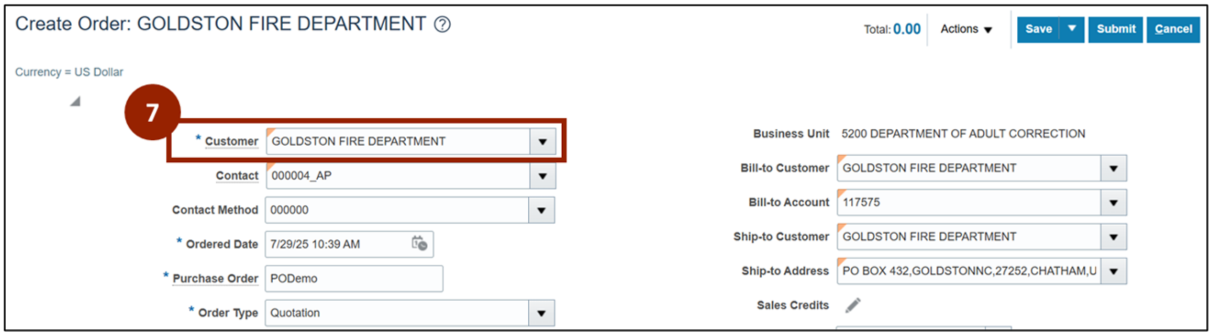
Note: Some screens within NCFS may have a **single asterisk (*)**; any fields marked with a single asterisk must be completed before proceeding. Additionally, the *Business Unit* field automatically defaults to ***5200 DEPARTMENT OF ADULT CORRECTION***.



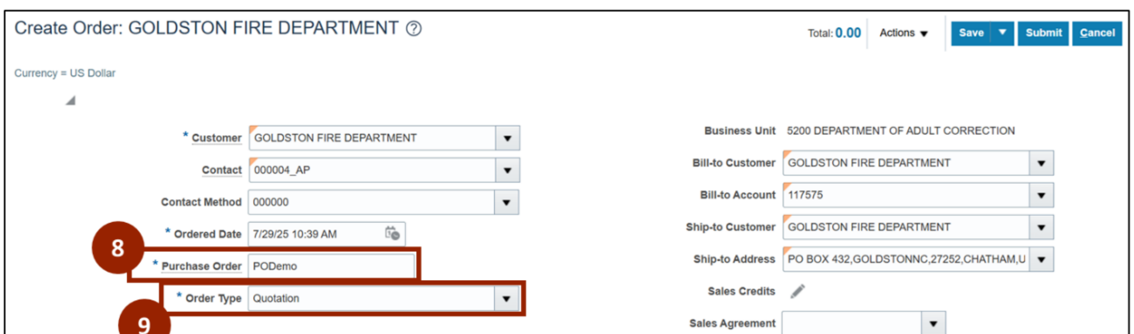
Note: As a best practice, all required fields in the *Header* section should be completed before proceeding to the tabs and tables below.

7. In the *Customer* field, enter or search for the **customer's name** (e.g., GOLDSTON FIRE DEPARTMENT).

Note: A customer must be selected from the list by either typing the name and choosing from the *Customer* field's drop-down menu, or by clicking the **Search…** link. Once a customer is selected, the other fields on this screen will automatically populate with the corresponding information for that customer. If you are unable to find the desired customer, the customer must be added to NCFS. To add a customer, contact NCCE Customer Service.



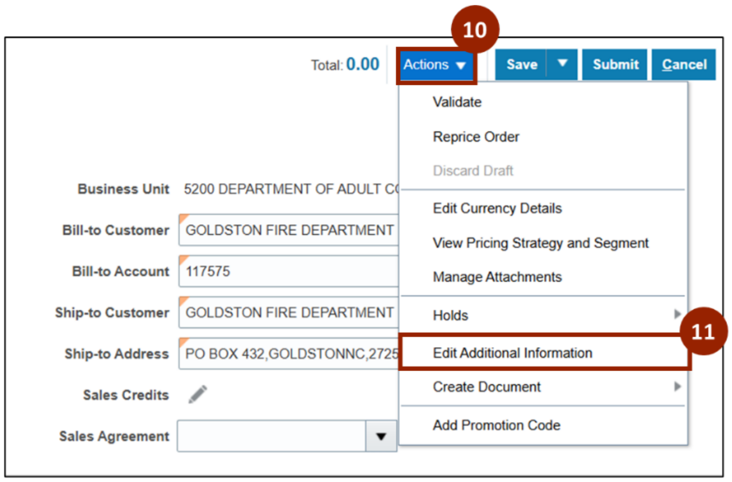
8. In the *Purchase Order* field, enter the **purchase order identifier** (e.g., "PODemo" is used in this demonstration).
9. In the *Order Type* drop-down field, select **the desired order type** from the drop-down list (e.g., Quotation).



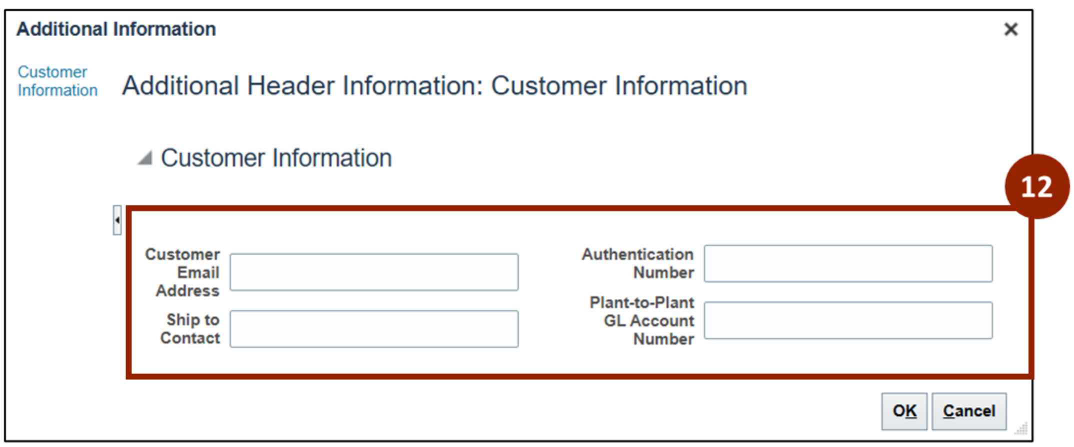
Note: NCFS includes **Actions** that allow for optional **Edit Additional Information** fields, which have been configured for DAC upon request.

To complete these additional fields, follow these steps:

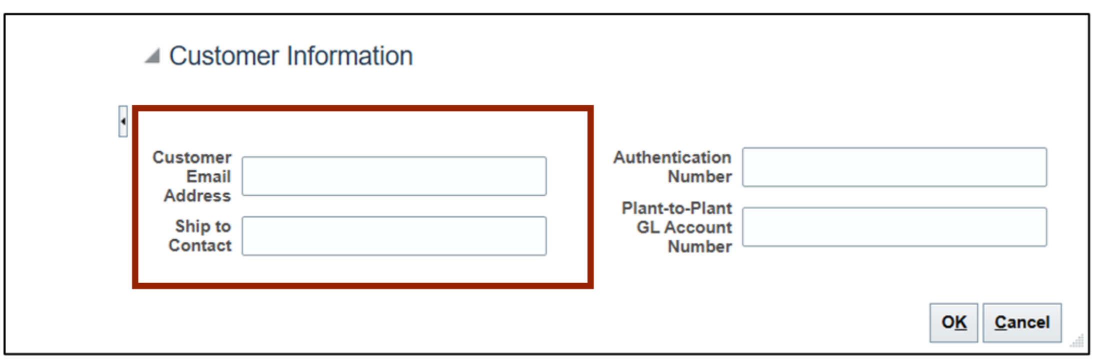
10. Click the *Actions* drop-down.
11. Select **Edit Additional Information.**



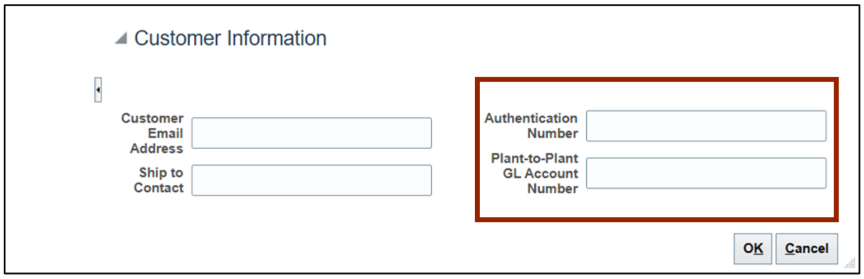
12. (Optional) Complete any of the fields displayed.



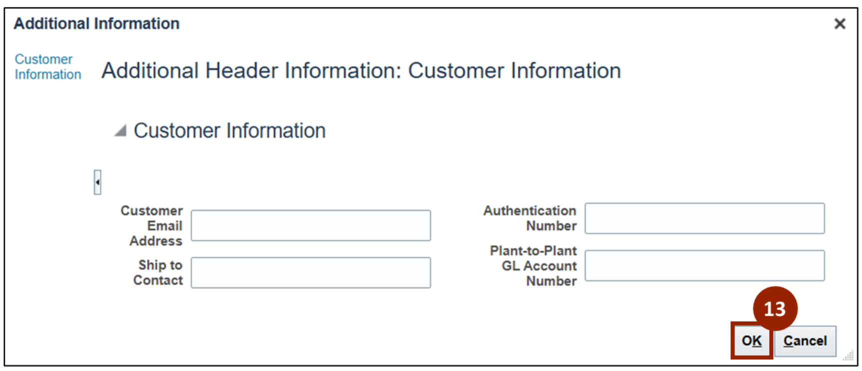
Note: The *Customer Email Address* field is provided for reference only, NCFS does not send information to the email address through the system. The email address is included in certain NCFS reports. The *Ship to Contact* field represents backup contacts designated by the customer, this field can include both the name and phone number. This information is also included in certain NCFS reports.



Note: The *Authentication Number* field is used only when an employee places an order. In such cases, payment must be made upfront using a credit card. Once the transaction is completed, an authentication number is generated by the payment system. This number should be entered here for employee-placed orders only. The *Plant-to-Plant GL Account Number* field is used for sales occurring within or between plants. The appropriate account number should be provided to facilitate financial transactions and reporting related to these internal sales.



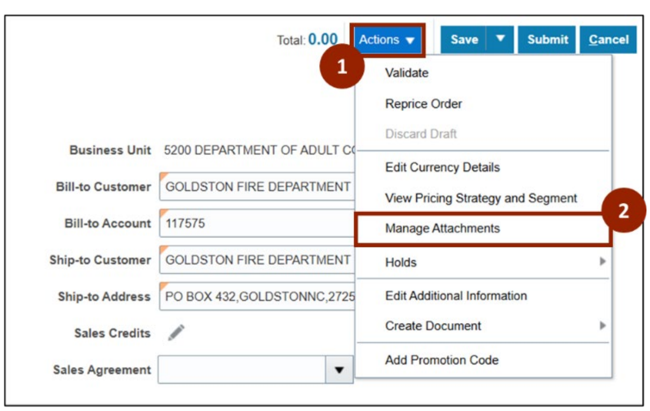
13. Once complete, click **OK** to return to the ***Create Order*** screen.



Manage Attachments: Header Level

Within the ***Create Order*** screen, if DAC needs to attach any documents at the **Header** level—such as reference materials or supporting files—NCFS provides an option within the *Actions* menu to manage attachments. To add or manage attachments, follow these steps:

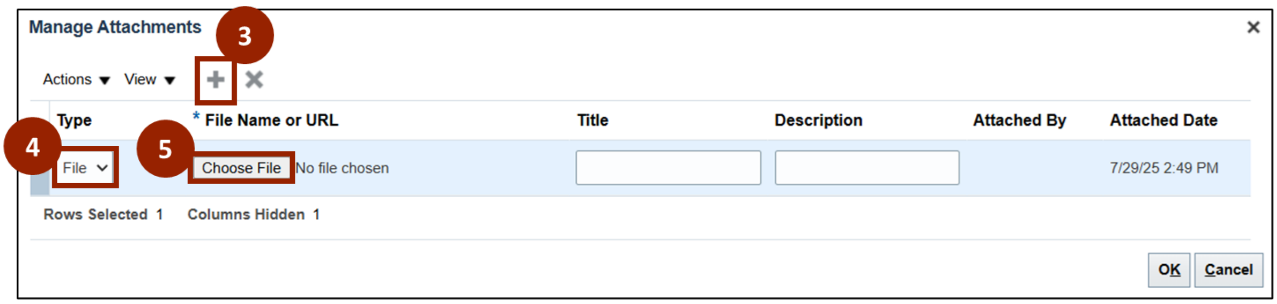
1. Click the *Actions* drop-down.
2. Select **Manage Attachments.**



3. Within the ***Manage Attachment*** pop-up window, click the **Add (+)** icon to insert a new row.
4. In the *Type* drop-down field, select the **appropriate attachment type** (e.g., File).

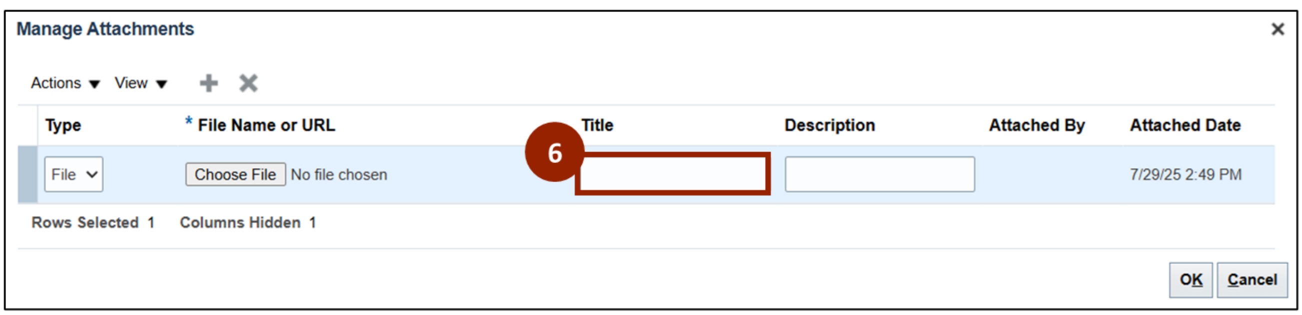
Note: Attachment options include **File, Text,** or **URL.** The required fields will vary depending on the selected type. For this demonstration, the **File** option is used.

5. In the *File Name or URL* field, click the **Choose File** button to open your computer's *File Explorer* and select a file to attach.



6. In the *Title* field, enter an **appropriate title.**

Note: If a title is not entered, the system will automatically use the first few words from the *File, Text, or URL* field as the default title. As a best practice, always enter a specific and descriptive title for each attachment.



7. (Optional) In the *Description* field, enter a **description.**

Note: To add additional attachments, repeat the steps above. Attachments can be removed by selecting the corresponding row and clicking the **Delete (X)** icon. To update an existing attachment, click the **Update…** button within the *File Name or URL* field after an attachment has been added.

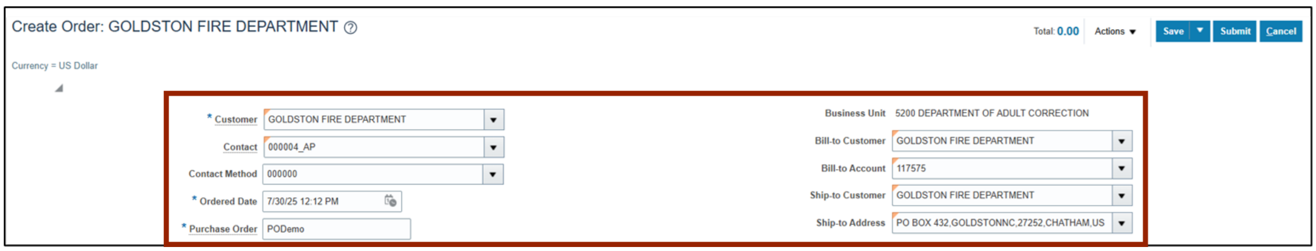
8. Once all **Attachments** have been added, click **OK** to save them to the **Header Level**

Note: The "**Create Document**" option is accessible from the *Actions* button drop-down list while entering a sales order. Selecting this option generates an NCFS-standard order document in a predefined format and provides the ability to email the generated document. For DAC, a customized **BI Publisher** report has been developed and is available in the *Reports and Analytics* folder. DAC users should utilize the customized report instead of the "**Create Document**" option from the **Header Level** *Actions* drop-down list.

Create Order Screen: Navigating the Header Section

Within the ***Create Order*** screen, the *Header* section provides multiple tabs for navigating and managing key order information. All data entered in the *Header* fields is synchronized with the details displayed in the tabs and tables in the lower portion of the screen, confirming consistency throughout the order. Once a customer is selected, fields across the Header, tabs, and tables automatically populate with information specific to that customer, such as contact methods, shipment details, and billing and payment information.

Note: Certain **Order Header** attributes become available only after a customer is entered. If you are unable to find the desired customer, the customer must be added to NCFS. To add a customer, contact the NCCE Customer Service.

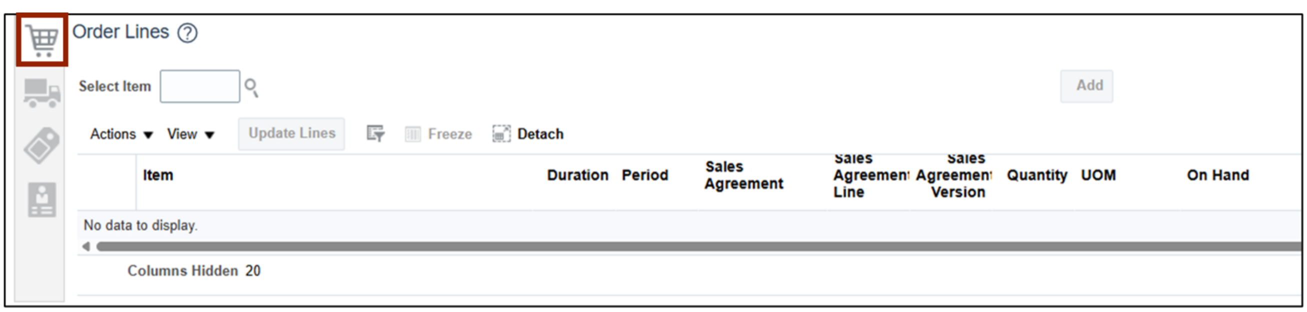


Create Order Tabs Overview

Note: There are three main tabs used in DAC to manage sales orders:

Order Lines Tab (Shopping Cart Icon)

- Contains the **Order Lines** tab, which lists the products requested by the customer.



Shipment Details Tab (Delivery Truck Icon)

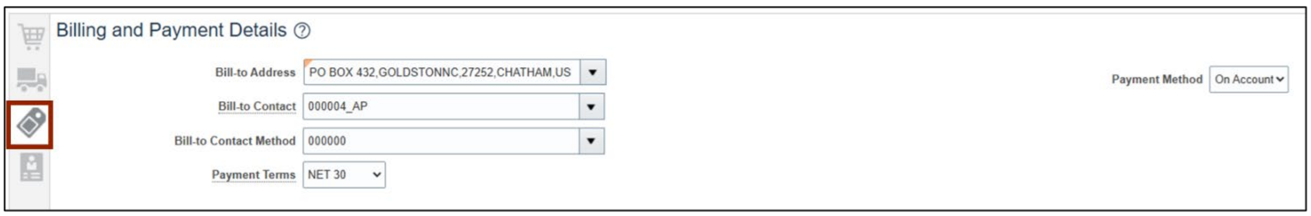
- Used to set ship-to details (such as the ship-to contact person) and select the **shipping method** (e.g., United States Postal Service).
- Allows you to add packing and shipping instructions, estimate availability, and determine whether order lines are shipped together in a shipment set or individually.

Note: The **Shipment Details** tab contains three additional sub-tabs: **General**, **Shipping**, and **Supply**. Detailed instructions for completing these will be provided in a subsequent course.

Billing and Payment Details Tab (Price Tag Icon)

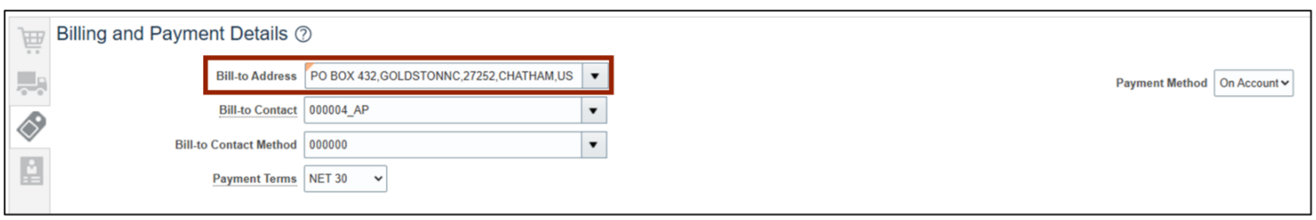
- Used to set billing details (such as the bill-to contact person), and define the payment term

Note: The *Payment Terms* field defaults to **Net 30** for all customers', meaning payment is due within 30 days.



Additional Notes: Some customers may have different *Ship-to* and *Bill-to Addresses* in their master customer record.

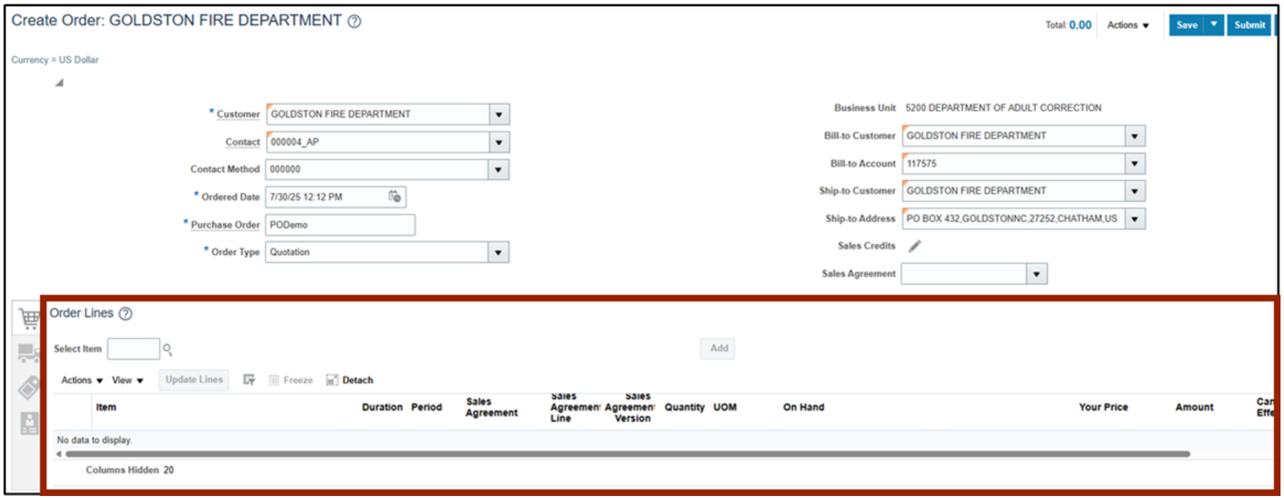
Note: Although the **Manage Sales Credits** tab appears in NCFS, DAC does not use it to manage sales orders.



Order Lines: Search and Add an Item

In the ***Create Order*** screen example, the **Order Type** has been set to **Quotation** in the *Header*. As a result, the system will recognize this as a quoted order, not one that should be fulfilled immediately.

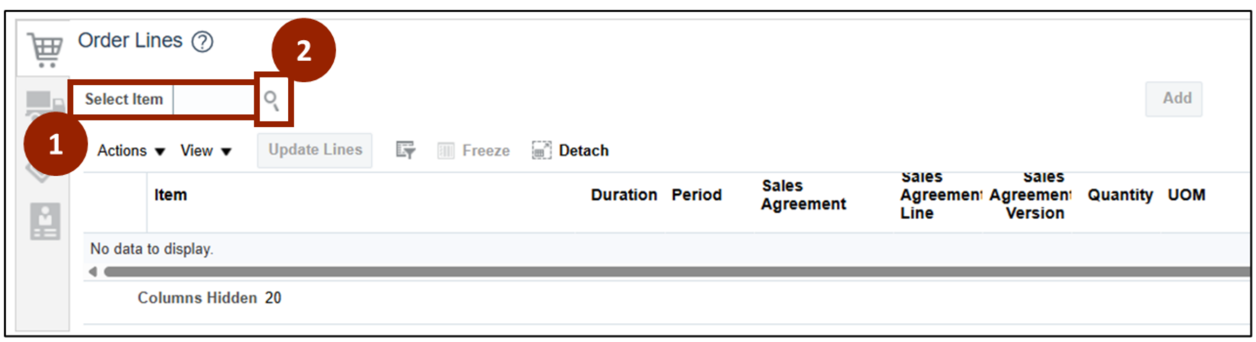
Note: Once all *Header* information has been entered move on to the *Order Lines* section, which is the default display within the ***Create Order*** screen.



1. In the *Select Item* field of the *Order Lines* table, enter the **item number.**

Note: If the **item number** is not known use the search feature outlined on the next set of steps.

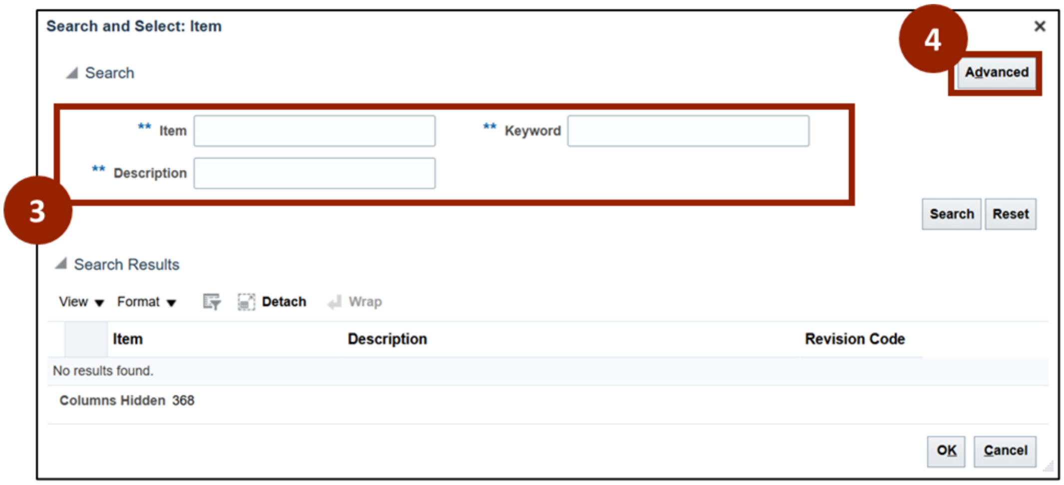
2. Click the *Select Item* field's **Search** Icon to open the ***Search and Select*** pop-up window.



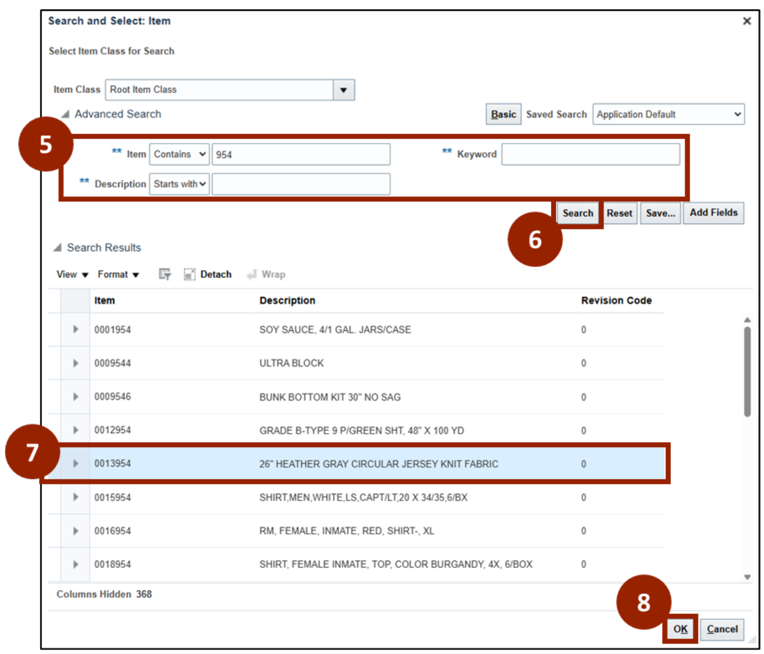
3. Complete **at least one** of the fields marked with a **double asterisk (**)** to perform a basic search.

Note: To move forward with a basic search, click the **Search** button. To add advanced search parameters, follow the subsequent steps.

4. Click the **Advanced** button.



5. Complete **at least one** of the fields marked with a **double asterisk (**)** to perform an advanced search.
6. Click the **Search** button.
7. From the *Search Results*, Select an **item row** (e.g., 0013954).
8. Click **OK** to return to the ***Create Order*** screen.

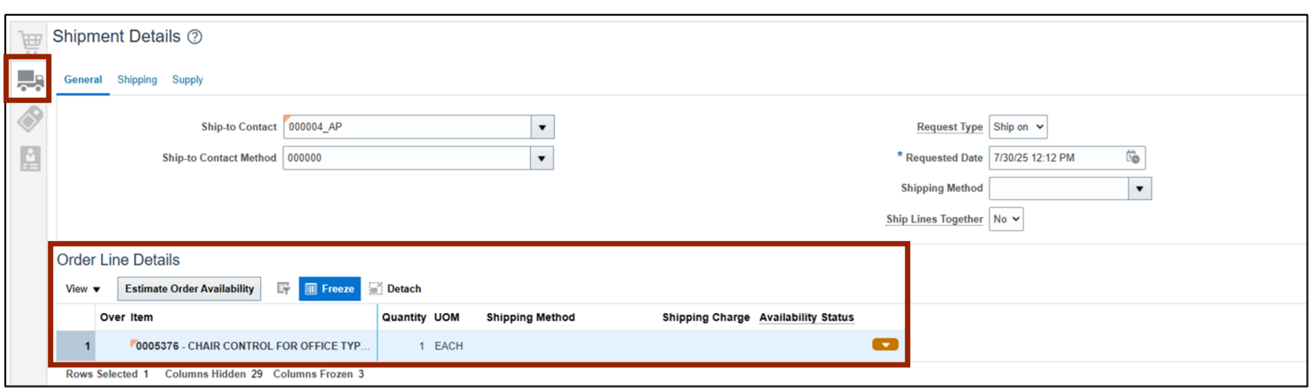


Note: The selected item populates within the *Select Item* field.

9. The *Quantity* field is pre-filled based on the selected item (e.g., “1”) and can be manually updated if a different amount is required.
10. The **Unit of Measurement (UOM)** defaults to the appropriate value for the selected item (e.g., “EACH”).
11. Click the **Add** button.

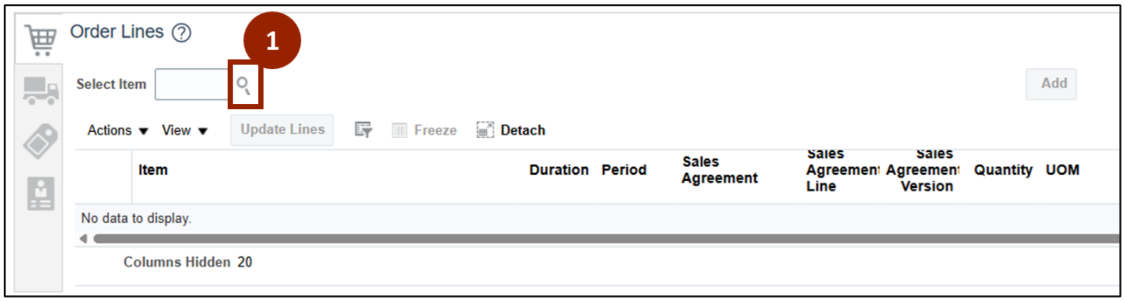
Note: Once an item has been added as a row within the *Order Lines* table, additional items may be added to the **Order Lines** list. Unlocked fields can also be adjusted as needed. For this demonstration we will display multiple rows within the **Order Lines** list with additional columns displayed when scrolling to the right. To add multiple **Order Lines**, repeat the previous steps.

Note: As items are added to the *Order Lines* table, the related tabs—accessible via the icons on the left side of the ***Create Order*** screen—automatically update to display information relevant to the selected order lines.



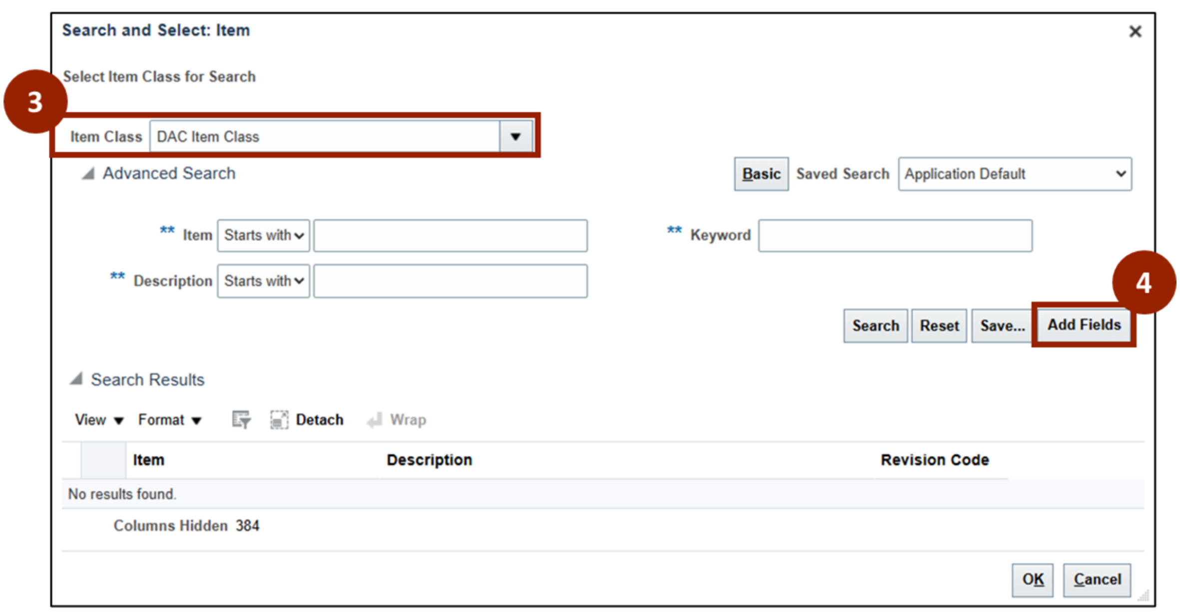
Search and Add a Legacy Item Number

1. Click the *Select Item* field's **Search** Icon to open the ***Search and Select*** pop-up window.



2. Click the **Advanced** button.

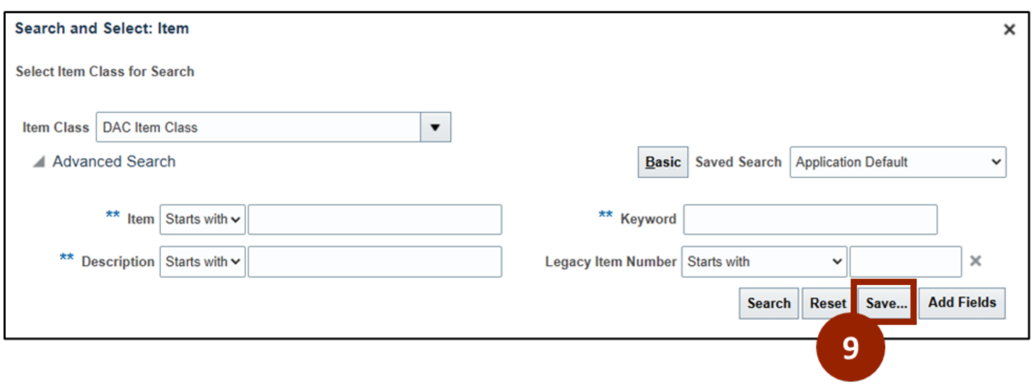
3. In the *Item Class* field, select **DAC Item Class.**
4. Click the **Add Fields** button.



5. In the *Find* field, enter **Legacy.**
6. Click the **Legacy Item Number** attribute.
7. Click the **single arrow (>)** icon to add the attribute to the *Selected Attributes* list.
8. Click **OK.**

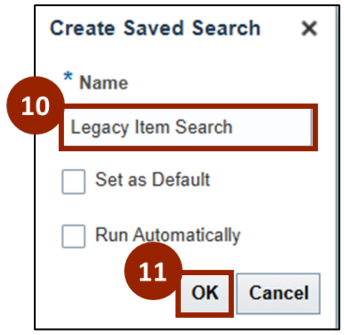
Note: The *Legacy Item Number* field now appears within the ***Search and Select: Item*** pop-up window.

9. Click the **Save…** button to save the search for easy access.



10. In the *Name* field, enter **Legacy Item Search**.

11. Click **OK.**



12. In the *Item* field, enter **00.**

Note: At least one of the fields marked with a **double asterisk (**)** needs to be filled before conducting the search.

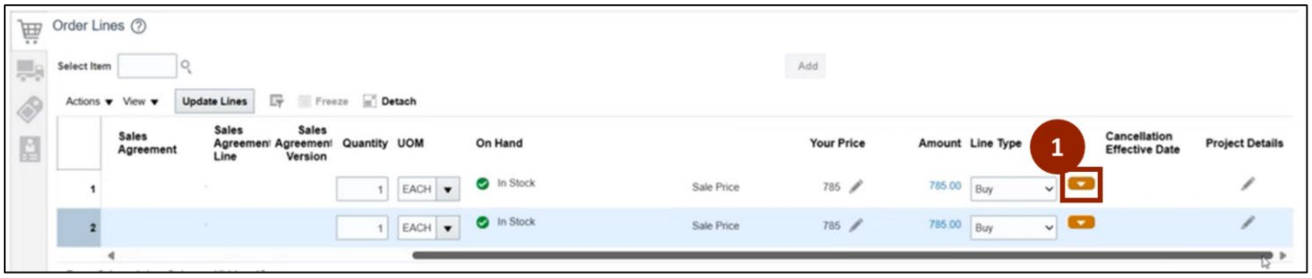
13. In the *Legacy Item Number* field, enter the **Legacy Item Number**.
14. Click the **Search** button.
15. From the *Search Results* field, select the **desired item.**
16. Click **OK.**

Note: If you cannot find the legacy item number, double-check the number for accuracy or try searching by **Description.**

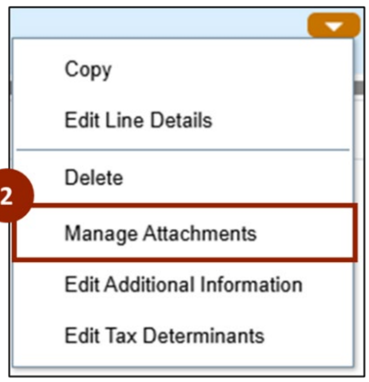
Manage Attachments: Line Item

To add custom information or attachments to an item from the *Order Lines* table in the ***Create Order*** screen, follow these steps:

1. Click the **Orange Actions** icon to display actions for the record.

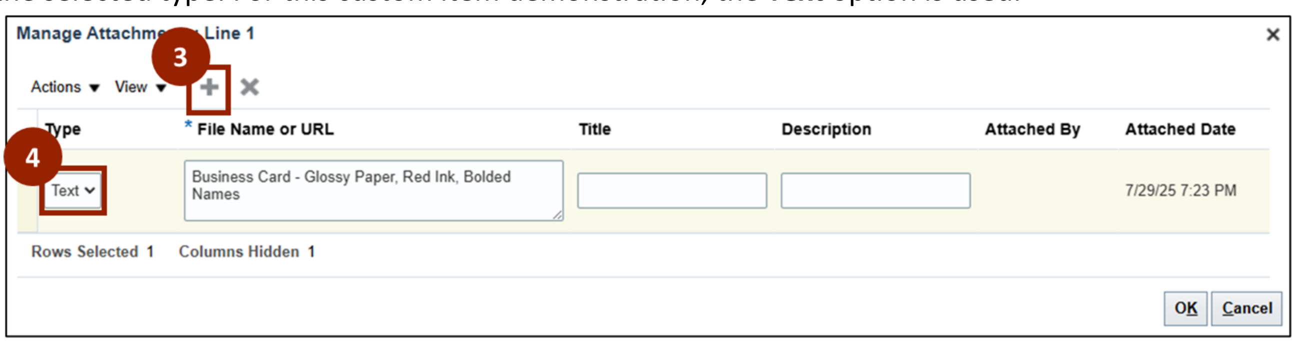


2. Select **Manage Attachments.**



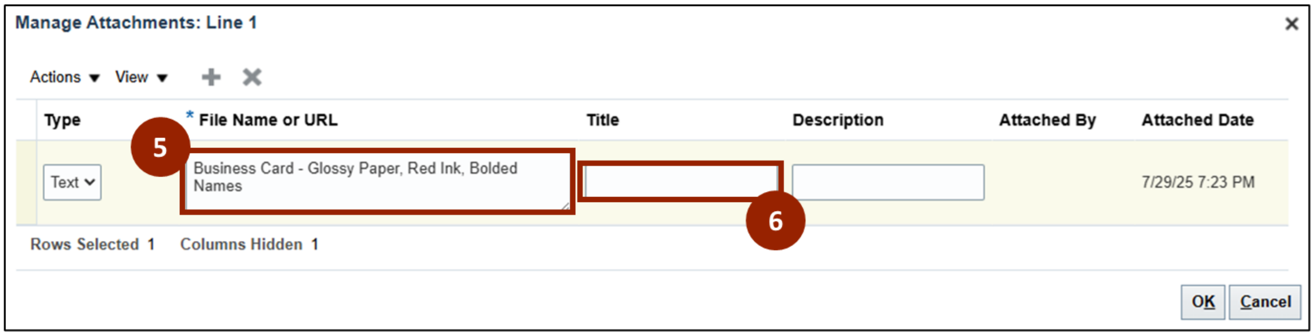
3. Within the ***Manage Attachments: Line 1*** pop-up window, click the **Add (+)** icon to insert a new row.
4. In the *Type* drop-down field, select the **Text** attachment type.

Note: Attachment **Type** options include **File**, **Text**, or **URL**. The required fields will vary depending on the selected type. For this custom item demonstration, the **Text** option is used.

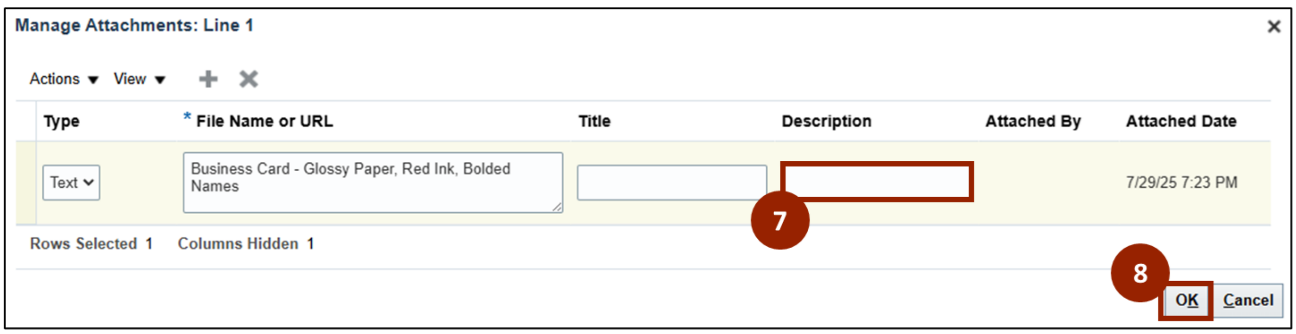


5. In the *File Name or URL* field, enter the **custom details** regarding the custom information (e.g., Business Card - Glossy Paper, Red Ink, Bolded Names).
6. In the *Title* field, enter an **appropriate title.**

Note: If a title is not provided, the system will default to using the first few words from the **File, Text, or URL** field. As a best practice, enter a specific and descriptive title for each item.

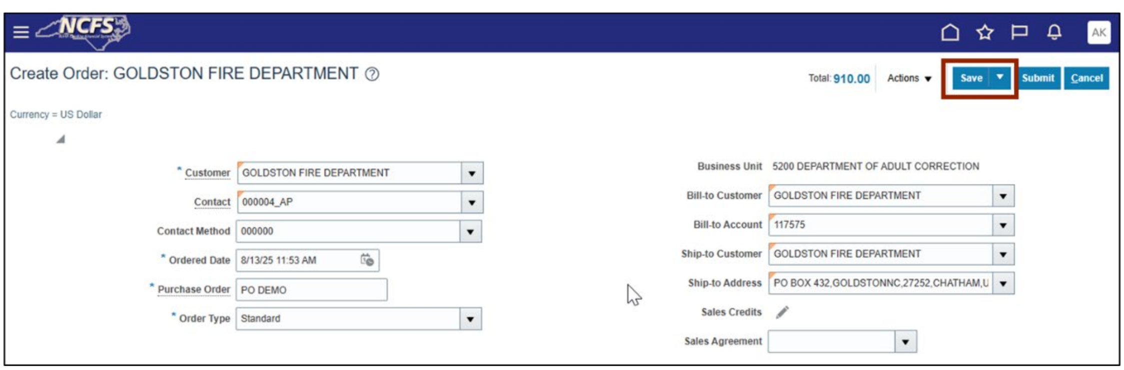


7. (Optional) In the *Description* field, enter a **description.**
8. Click **OK.**



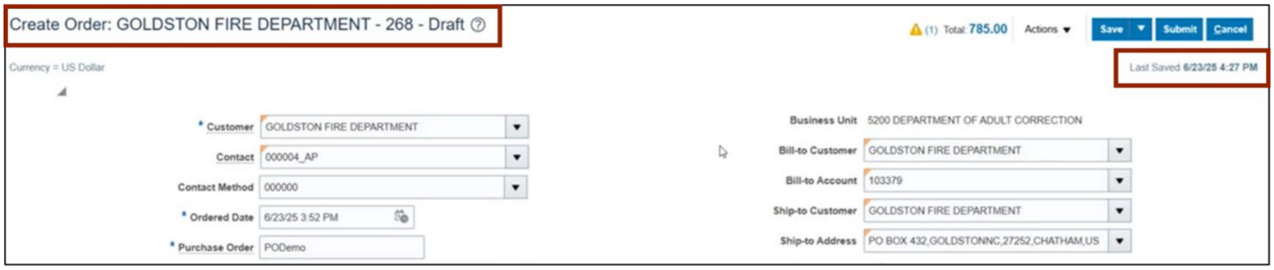
Save Sales Order Progress

Note: To confirm that your progress is not lost, click the **Save** button located at the top right corner of the ***Create Order*** screen.



Note: If at least one **Order Line** has been added, clicking **Save** will store the current sales order as a draft, a ***Confirmation*** *pop-up window* indicating that the sales order has been saved in draft format successfully, and the ***Create Order*** screen will display a *Last Saved* date.

Note: Saving your progress at this stage allows you to return and complete the sales order process later. Managing a ***Sales Order Draft*** will be covered in the subsequent course.



Wrap-Up

NCFS users can ***enter manual orders*** using the steps above.

Additional Resources

Instructor Led Training (ILT)

- MFG113 – Manage Sales Orders 1