



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

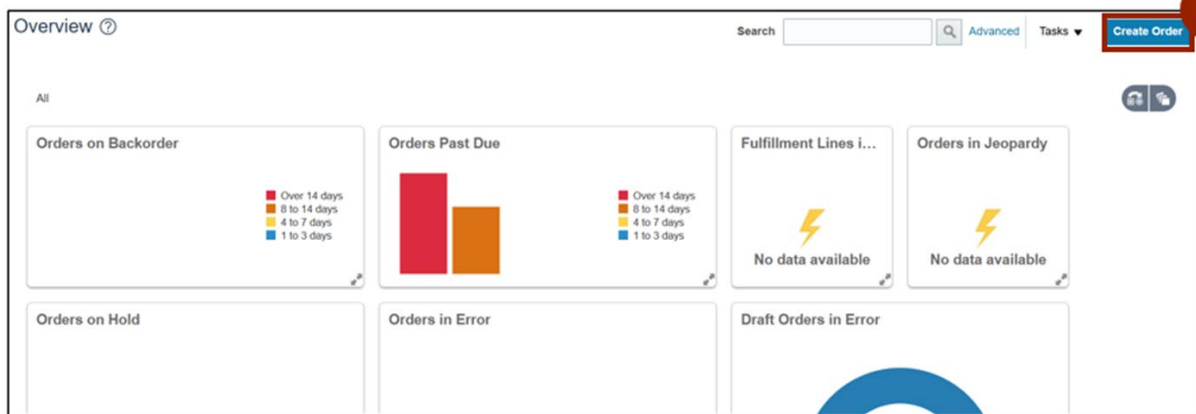
1. Click the **Company Single Sign-On (SSO)** button.
2. Enter your **dac.nc.gov** email address.
3. Click **Next**, then enter **password**.
4. On the **Home** page, select the **Order Management** tab.
5. Click **Order Management App**.



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.

Create Order: GOLDSTON FIRE DEPARTMENT ?

Total: 0.00 Actions Save Submit Cancel

Currency = US Dollar

* Customer: GOLDSTON FIRE DEPARTMENT

Contact: 000004_AP

Contact Method: 000000

* Ordered Date: 7/29/25 10:39 AM

* Purchase Order: PODemo

* Order Type: Quotation

Business Unit: 5200 DEPARTMENT OF ADULT CORRECTION

Bill-to Customer: GOLDSTON FIRE DEPARTMENT

Bill-to Account: 117575

Ship-to Customer: GOLDSTON FIRE DEPARTMENT

Ship-to Address: PO BOX 432, GOLDSTON NC, 27252, CHATHAM, U

Sales Credits

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).

Create Order: GOLDSTON FIRE DEPARTMENT ?

Total: 0.00 Actions Save Submit Cancel

Currency = US Dollar

* Customer: GOLDSTON FIRE DEPARTMENT

Contact: 000004_AP

Contact Method: 000000

* Ordered Date: 7/29/25 10:39 AM

* Purchase Order: PODemo

* Order Type: Quotation

Business Unit: 5200 DEPARTMENT OF ADULT CORRECTION

Bill-to Customer: GOLDSTON FIRE DEPARTMENT

Bill-to Account: 117575

Ship-to Customer: GOLDSTON FIRE DEPARTMENT

Ship-to Address: PO BOX 432, GOLDSTON NC, 27252, CHATHAM, U

Sales Credits

Sales Agreement

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**.

This screenshot shows a manual order entry form. At the top right, there is a 'Total: 0.00' label. Below it, a row of buttons includes 'Actions', 'Save', 'Submit', and 'Cancel'. The 'Actions' dropdown menu is open, displaying a list of options: 'Validate', 'Reprice Order', 'Discard Draft', 'Edit Currency Details', 'View Pricing Strategy and Segment', 'Manage Attachments', 'Holds', 'Edit Additional Information', 'Create Document', and 'Add Promotion Code'. The 'Edit Additional Information' option is highlighted with a red box and a red circle containing the number 11. A red circle containing the number 10 points to the 'Actions' button. The form fields include 'Business Unit' (5200 DEPARTMENT OF ADULT C...), 'Bill-to Customer' (GOLDSTON FIRE DEPARTMENT), 'Bill-to Account' (117575), 'Ship-to Customer' (GOLDSTON FIRE DEPARTMENT), 'Ship-to Address' (PO BOX 432, GOLDSTONNC, 2725...), 'Sales Credits' (with a pencil icon), and 'Sales Agreement' (a dropdown menu).

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

This screenshot shows the 'Additional Information' dialog box. The title bar says 'Additional Information' with a close button (X). Inside, there is a 'Customer Information' section. The 'Customer Information' section is expanded, showing a list of fields: 'Customer Email Address', 'Ship to Contact', 'Authentication Number', and 'Plant-to-Plant GL Account Number'. A red box highlights the 'Customer Email Address' and 'Ship to Contact' fields. A red circle containing the number 12 points to the 'Plant-to-Plant GL Account Number' field. At the bottom right, there are 'OK' and 'Cancel' buttons.

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.

This screenshot is identical to the one above, showing the 'Additional Information' dialog box with the 'Customer Information' section expanded. A red box highlights the 'Customer Email Address' and 'Ship to Contact' fields. The 'Plant-to-Plant GL Account Number' field is also visible. The 'OK' and 'Cancel' buttons are at the bottom right.

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.

Customer Information

Customer Email Address

Ship to Contact

Authentication Number

Plant-to-Plant GL Account Number

OK Cancel

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

Additional Information

Customer Information

Additional Header Information: Customer Information

Customer Information

Customer Email Address

Ship to Contact

Authentication Number

Plant-to-Plant GL Account Number

OK Cancel

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**.

Total: 0.00

Actions Save Submit Cancel

Business Unit 5200 DEPARTMENT OF ADULT C...

Bill-to Customer GOLDSTON FIRE DEPARTMENT

Bill-to Account 117575

Ship-to Customer GOLDSTON FIRE DEPARTMENT

Ship-to Address PO BOX 432, GOLDSTONNC, 2725

Sales Credits

Sales Agreement

Validate

Reprice Order

Discard Draft

Edit Currency Details

View Pricing Strategy and Segment

Manage Attachments

Holds

Edit Additional Information

Create Document

Add Promotion Code

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.

The screenshot shows the 'Manage Attachments' window. At the top, there are 'Actions' and 'View' dropdown menus, followed by a red circle with a '+' icon (callout 3) and a close 'X' icon. Below this is a table with columns: Type, File Name or URL, Title, Description, Attached By, and Attached Date. In the 'Type' column, a dropdown menu is open showing 'File' (callout 4). In the 'File Name or URL' column, there is a 'Choose File' button and the text 'No file chosen' (callout 5). The 'Attached Date' column shows '7/29/25 2:49 PM'. At the bottom, there are 'OK' and 'Cancel' buttons.

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.

This screenshot is similar to the previous one, but with a red circle and the number '6' (callout 6) highlighting the 'Title' field, which is currently empty. The 'Type' dropdown still shows 'File', and the 'File Name or URL' column still shows 'Choose File' and 'No file chosen'. The 'Attached Date' remains '7/29/25 2:49 PM'. The 'OK' and 'Cancel' buttons are at the bottom right.

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: GOLDSTON FIRE DEPARTMENT ⓘ

Currency = US Dollar

Total: 0.00 Actions Save Submit Cancel

* Customer: GOLDSTON FIRE DEPARTMENT

Contact: 000004_AP

Contact Method: 000000

* Ordered Date: 7/30/25 12:12 PM

* Purchase Order: PODemo

Business Unit: 5200 DEPARTMENT OF ADULT CORRECTION

Bill-to Customer: GOLDSTON FIRE DEPARTMENT

Bill-to Account: 117575

Ship-to Customer: GOLDSTON FIRE DEPARTMENT

Ship-to Address: PO BOX 432, GOLDSTONNC, 27252, CHATHAM, US

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.

Shopping Cart Icon

Order Lines ⓘ

Select Item

Add

Actions View Update Lines Freeze Detach

Item	Duration	Period	Sales Agreement	Sales Agreement Line	Sales Agreement Version	Quantity	UOM	On Hand
No data to display.								
Columns Hidden 20								

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.



Shipment Details ?

General Shipping Supply

Ship-to Contact 000004_AP

Ship-to Contact Method 000000

Request Type Ship on

* Requested Date 7/30/25 12:12 PM

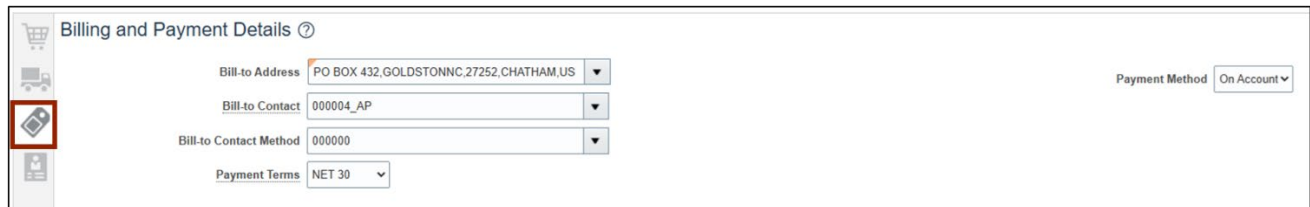
Shipping Method

Ship Lines Together No

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.



Billing and Payment Details ?

Bill-to Address PO BOX 432.GOLDSTONNC.27252.CHATHAM.US

Bill-to Contact 000004_AP

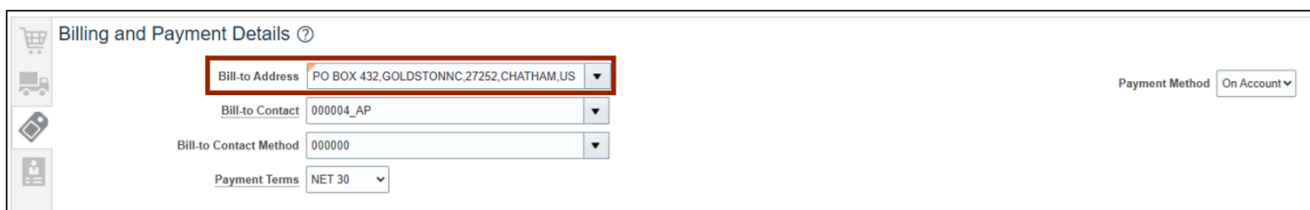
Bill-to Contact Method 000000

Payment Terms NET 30

Payment Method On Account

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.



Billing and Payment Details ?

Bill-to Address PO BOX 432.GOLDSTONNC.27252.CHATHAM.US

Bill-to Contact 000004_AP

Bill-to Contact Method 000000

Payment Terms NET 30

Payment Method On Account

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.

Create Order: GOLDSTON FIRE DEPARTMENT ?

Total 0.00 Actions Save Submit

Currency = US Dollar

* Customer GOLDSTON FIRE DEPARTMENT
Contact 000004_AP
Contact Method 000000
* Ordered Date 7/30/25 12:12 PM
* Purchase Order PODemo
* Order Type Quotation

Business Unit 5200 DEPARTMENT OF ADULT CORRECTION
Bill-to Customer GOLDSTON FIRE DEPARTMENT
Bill-to Account 117575
Ship-to Customer GOLDSTON FIRE DEPARTMENT
Ship-to Address PO BOX 432,GOLDSTONNC,27252,CHATHAM,US
Sales Credits
Sales Agreement

Order Lines ?

Select Item Add

Actions View Update Lines Freeze Detach

Item	Duration	Period	Sales Agreement	Sales Agreement Line	Sales Agreement Version	Quantity	UOM	On Hand	Your Price	Amount	Can Eff
No data to display.											

Columns Hidden 20

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.

Order Lines ?

Select Item Add

1 Actions View Update Lines Freeze Detach

Item	Duration	Period	Sales Agreement	Sales Agreement Line	Sales Agreement Version	Quantity	UOM
No data to display.							

Columns Hidden 20

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.

Search and Select: Item

Search

** Item ** Keyword

** Description

Search Reset

Search Results

View Format Detach Wrap

Item	Description	Revision Code
No results found.		
Columns Hidden 368		

OK Cancel

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.

Search and Select: Item

Select Item Class for Search

Item Class Root Item Class

Advanced Search Basic Saved Search Application Default

** Item Contains 954 ** Keyword

** Description Starts with

Search Reset Save... Add Fields

Search Results

View Format Detach Wrap

Item	Description	Revision Code
0001954	SOY SAUCE, 4/1 GAL. JARS/CASE	0
0009544	ULTRA BLOCK	0
0009546	BUNK BOTTOM KIT 30" NO SAG	0
0012954	GRADE B-TYPE 9 P/GREEN SHT, 48" X 100 YD	0
0013954	26" HEATHER GRAY CIRCULAR JERSEY KNIT FABRIC	0
0015954	SHIRT,MEN,WHITE,LS,CAPT/ILT,20 X 34/35,6/BX	0
0016954	RM, FEMALE, INMATE, RED, SHIRT-, XL	0
0018954	SHIRT, FEMALE INMATE, TOP, COLOR BURGANDY, 4X, 6/BOX	0

Columns Hidden 368

OK Cancel

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.

The screenshot shows the 'Order Lines' table with the following columns: Item, Duration, Period, Sales Agreement, Sales Agreement Line, Sales Agreement Version, Quantity, UOM, On Hand, and Your Price. The 'Select Item' dropdown is set to '0018954 CHAIR, ONSLOW-HR, TASK, MB, HR'. The 'Quantity' field is pre-filled with '1' and the 'UOM' is 'EACH'. The 'Add' button is highlighted with a red box and the number 11. The 'Quantity' field is highlighted with a red box and the number 9. The 'UOM' dropdown is highlighted with a red box and the number 10.

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.

The screenshot shows the 'Order Lines' table with one row added. The row is highlighted with a red box and contains the following data: Item: 0018954- CHAIR, ONSLOW-HR, TASK, MB, HR (TASK7031), Quantity: 1, UOM: EACH, On Hand: In Stock, Your Price: 785. The 'Add' button is visible in the top right corner.

The screenshot shows the 'Order Lines' table with two rows added. The rows are highlighted with a red box and contain the following data: Row 1: Item: 0018954- CHAIR, ONSLOW-HR, TASK, MB, HR (TASK7031), Quantity: 1, UOM: EACH, On Hand: In Stock, Your Price: 785. Row 2: Item: 0018954- CHAIR, ONSLOW-HR, TASK, MB, HR (TASK7031), Quantity: 1, UOM: EACH, On Hand: In Stock, Your Price: 785.

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.

The screenshot shows the 'Shipment Details' screen with the 'Order Line Details' tab selected. The 'Order Line Details' tab is highlighted with a red box and contains the following data: Item: 0006376 - CHAIR CONTROL FOR OFFICE TYP..., Quantity: 1, UOM: EACH, Shipping Method: (blank), Shipping Charge: (blank), Availability Status: (blank). The 'General' tab is also visible and contains the following data: Ship-to Contact: 000004_AP, Ship-to Contact Method: 000000, Request Type: Ship on, Requested Date: 7/30/25 12:12 PM, Shipping Method: (blank), Ship Lines Together: No.

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.

The screenshot shows the 'Order Lines' window. At the top left, there is a 'Select Item' field with a magnifying glass icon next to it, which is highlighted with a red circle and the number 1. To the right of the field is an 'Add' button. Below the field, there are buttons for 'Update Lines', 'Freeze', and 'Detach'. A table with columns 'Item', 'Duration', 'Period', 'Sales Agreement', 'Sales Agreement Line', 'Sales Agreement Version', 'Quantity', and 'UOM' is shown below these buttons. The table is currently empty, displaying 'No data to display.' and 'Columns Hidden 20'.

2. Click the **Advanced** button.

The screenshot shows the 'Search and Select: Item' pop-up window. At the top right, there is a red circle with the number 2 next to the 'Advanced' button. The window has a 'Search' section with fields for 'Item' and 'Keyword', and a 'Description' field. There are 'Search' and 'Reset' buttons. Below this is a 'Search Results' section with a table showing 'Item', 'Description', and 'Revision Code'. The table is empty, displaying 'No results found.' and 'Columns Hidden 368'. At the bottom right, there are 'OK' and 'Cancel' buttons.

3. In the *Item Class* field, select **DAC Item Class**.

4. Click the **Add Fields** button.

The screenshot shows the 'Search and Select: Item' pop-up window. At the top left, there is a red circle with the number 3 next to the 'Item Class' dropdown menu, which is currently set to 'DAC Item Class'. At the bottom right, there is a red circle with the number 4 next to the 'Add Fields' button. The window also has a 'Basic' tab, a 'Saved Search' dropdown, and a 'Search Results' section with a table showing 'Item', 'Description', and 'Revision Code'. The table is empty, displaying 'No results found.' and 'Columns Hidden 384'. At the bottom right, there are 'OK' and 'Cancel' buttons.

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**.

The screenshot shows the 'Select and Add: Attributes' dialog box. On the left, under 'Available Attributes', the 'Find' field contains the text 'Legacy'. Below it, the 'Attributes' list includes 'Conversion Factor', 'Item Group', 'Item Subgroup', 'Legacy Item Number' (which is highlighted with a blue background), 'MTO/MTS', 'Price Option', 'SKU', 'Seasonal Item', 'UOP', and a collapsed section for 'Item Supplier Association', 'Item Revision', and 'Item Relationships'. At the bottom left, it says 'Rows Selected 1'. On the right, the 'Selected Attributes' section is empty with the text 'No data to display.' Below the lists are navigation arrows: a single right arrow (>) and a double left arrow (<<). The single right arrow is highlighted with a red box. At the bottom right, there are 'OK' and 'Cancel' buttons, with the 'OK' button highlighted by a red box.

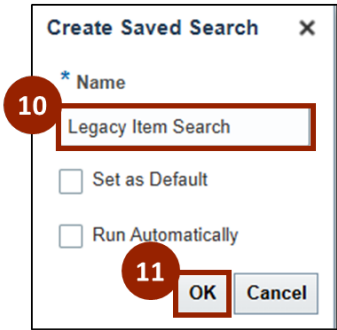
Note: The *Legacy Item Number* field now appears within the *Search and Select: Item* pop-up window.

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

The screenshot shows the 'Search and Select: Item' dialog box. At the top, it says 'Select Item Class for Search'. Below that, the 'Item Class' dropdown menu is set to 'DAC Item Class'. There are tabs for 'Basic' (selected), 'Saved Search', and 'Application Default'. Under the 'Advanced Search' section, there are two rows: '** Item' with a 'Starts with' dropdown and an input field, and '** Description' with a 'Starts with' dropdown and an input field. To the right of these, there is a 'Keyword' field and a 'Legacy Item Number' field with a 'Starts with' dropdown and an input field. At the bottom right, there are four buttons: 'Search', 'Reset', 'Save...' (highlighted with a red box), and 'Add Fields'. A red circle with the number '9' is placed over the 'Save...' button.

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

11. Click **OK**.



The 'Create Saved Search' dialog box has a title bar with a close button. It contains a text field for 'Name' with the value 'Legacy Item Search' (marked with a red circle 10). Below it are two checkboxes: 'Set as Default' and 'Run Automatically'. At the bottom are 'OK' (marked with a red circle 11) and 'Cancel' buttons.

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.

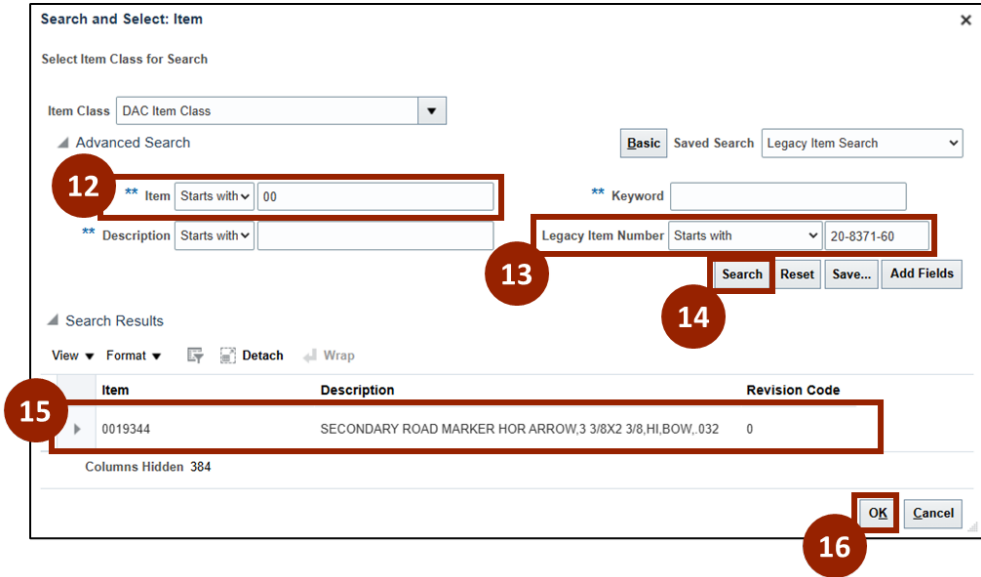
13. In the *Legacy Item Number* field, enter the **Legacy Item Number**.

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**.



The 'Search and Select: Item' dialog box has a title bar with a close button. It contains a 'Select Item Class for Search' section with a dropdown menu showing 'DAC Item Class'. Below this is an 'Advanced Search' section with tabs for 'Basic' and 'Saved Search' (selected). The 'Saved Search' tab shows a dropdown menu with 'Legacy Item Search'. There are two search criteria: '** Item' (marked with a red circle 12) with a value of '00', and '** Description' (marked with a red circle 13) with a value of '20-8371-60'. There are also 'Search' (marked with a red circle 14), 'Reset', 'Save...', and 'Add Fields' buttons. Below the search criteria is a 'Search Results' section with a table showing one result (marked with a red circle 15). The table has columns for 'Item', 'Description', and 'Revision Code'. The result is '0019344', 'SECONDARY ROAD MARKER HOR ARROW,3 3/8X2 3/8,HL,BOW,032', and '0'. At the bottom are 'OK' (marked with a red circle 16) and 'Cancel' buttons.

Item	Description	Revision Code
0019344	SECONDARY ROAD MARKER HOR ARROW,3 3/8X2 3/8,HL,BOW,032	0

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.

The screenshot shows the 'Order Lines' table with columns: Sales Agreement, Sales Agreement Line, Sales Agreement Version, Quantity, UOM, On Hand, Your Price, Amount, Line Type, Cancellation Effective Date, and Project Details. Two rows are visible, both with 'In Stock' status. The 'Actions' icon (an orange square with a white plus sign) is highlighted with a red circle and the number 1.

2. Select **Manage Attachments**.

The screenshot shows the Actions menu with options: Copy, Edit Line Details, Delete, Manage Attachments, Edit Additional Information, and Edit Tax Determinants. The 'Manage Attachments' option is highlighted with a red rectangle and the number 2.

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.

The screenshot shows the 'Manage Attachments: Line 1' pop-up window. It has a table with columns: Type, File Name or URL, Title, Description, Attached By, and Attached Date. The 'Type' dropdown is set to 'Text' (highlighted with a red circle and the number 4). The 'File Name or URL' field contains 'Business Card - Glossy Paper, Red Ink, Bolded Names'. The 'Attached Date' field shows '7/29/25 7:23 PM'. The 'Add (+)' icon is highlighted with a red circle and the number 3. The window also shows 'Rows Selected 1' and 'Columns Hidden 1' at the bottom.

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.

Manage Attachments: Line 1

Actions ▾ View ▾ + X

Type	* File Name or URL	Title	Description	Attached By	Attached Date
Text ▾	Business Card - Glossy Paper, Red Ink, Bolded Names				7/29/25 7:23 PM

Rows Selected 1 Columns Hidden 1

OK Cancel

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

Manage Attachments: Line 1

Actions ▾ View ▾ + X

Type	* File Name or URL	Title	Description	Attached By	Attached Date
Text ▾	Business Card - Glossy Paper, Red Ink, Bolded Names				7/29/25 7:23 PM

Rows Selected 1 Columns Hidden 1

OK Cancel

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.

NCFS

Create Order: GOLDSTON FIRE DEPARTMENT ⓘ

Total: 910.00 Actions ▾ Save ▾ Submit Cancel

Currency = US Dollar

* Customer: GOLDSTON FIRE DEPARTMENT

Contact: 000004_AP

Contact Method: 000000

* Ordered Date: 8/13/25 11:53 AM ⓘ

* Purchase Order: PO DEMO

* Order Type: Standard

Business Unit: 5200 DEPARTMENT OF ADULT CORRECTION

Bill to Customer: GOLDSTON FIRE DEPARTMENT

Bill to Account: 117575

Ship to Customer: GOLDSTON FIRE DEPARTMENT

Ship to Address: PO BOX 432, GOLDSTON NC 27252, CHATHAM, U

Sales Credits ⓘ

Sales Agreement: ▾

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.

Create Order: GOLDSTON FIRE DEPARTMENT - 268 - Draft ?

(1) Total: 785.00 Actions Save Submit Cancel

Currency = US Dollar

Last Saved 6/23/25 4:27 PM

* Customer	GOLDSTON FIRE DEPARTMENT	Business Unit	5200 DEPARTMENT OF ADULT CORRECTION
Contact	000004_AP	Bill-to Customer	GOLDSTON FIRE DEPARTMENT
Contact Method	000000	Bill-to Account	103379
* Ordered Date	6/23/25 3:52 PM	Ship-to Customer	GOLDSTON FIRE DEPARTMENT
* Purchase Order	PODemo	Ship-to Address	PO BOX 432,GOLDSTONNC,27252,CHATHAM,US

Wrap-Up

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

Additional Resources

Instructor Led Training (ILT)

- MFG113 – Manage Sales Orders 1