CREATE SALES ORDER

MFG

QUICK REFERENCE GUIDE

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step guide of ***how to create a sales order*** in the North Carolina Financial System (**NCFS**).

Introduction and Overview

This QRG covers the process of ***creating a sales order***. This involves detailing how to create an order draft, selecting a customer, entering key order details in NCFS, adding items to the order, managing attachments, and submitting the order.

Follow the steps outlined in the **MFG-28: Entering Manual Orders QRG**. Once the sales order draft has been created, continue with the steps below to create a sales order.

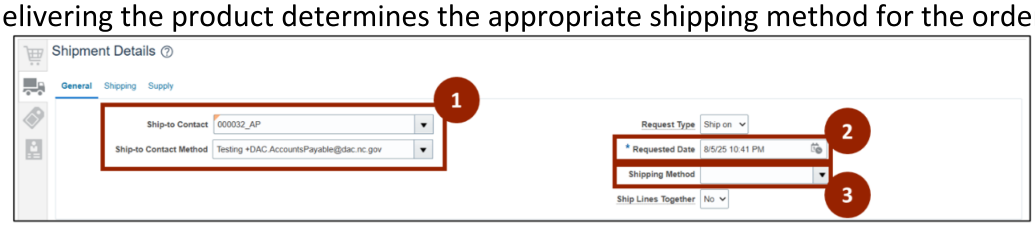
Create a Sales Order – Sales Order Line: Shipment Details

The next step in the **create a sales order** process is to review and verify information in the **Shipment Details** tab in the ***Sales Order*** screen. This draft contains multiple items in the *Order Lines* section. The information within each tab should be reviewed to determine if any edits are required, starting with the **Shipment Details** tab.

To verify shipment details, please follow the steps below:

1. Within the **General** tab of the **Shipment Details** tab, verify the **Ship-to Contact** and **Ship-to Contact Method** fields are accurate.
2. In the *Requested Date* field, verify that the **Requested Date** is accurate.
3. In the *Shipping Method* field, select the **appropriate option.**

   Note: If an option is not selected from this field, the plant or shipping team responsible for delivering the product determines the appropriate shipping method for the order.

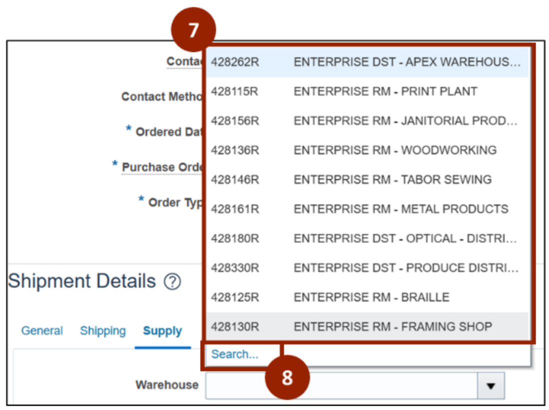
4. Within the **Shipping** tab, in the *Allow Partial Shipments of Lines* drop-down field, select **Yes** if the customer requests for each item to be shipped partially.

   Note: By default, NCFS sets this field as **Yes**.
5. (Optional) In the *Shipping Instructions* field, enter **specific instructions** for shipping order, if any (e.g., Deliver on weekdays).

6. (Optional) In the *Packing Instructions* field, enter **specific instructions** for packing the order, if any (e.g., Fragile, add additional protection).

7. (Optional) In the *Warehouse* drop-down field of the **Supply** tab, select the **warehouse, or plant** this item should be supplied from.

8. From the *Warehouse* field's drop-down list, click **Search...** link to open the ***Search and Select: Warehouse*** window.



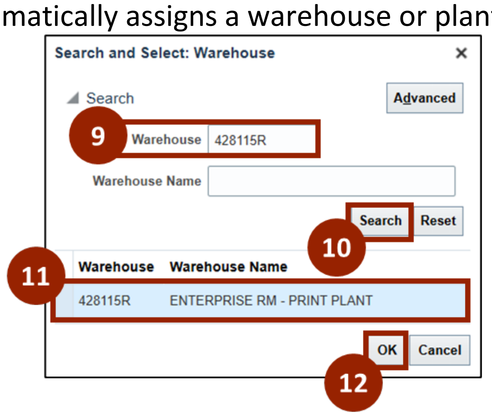
9. In the *Warehouse* field enter the **desired plant** (e.g., 428115R).

10. Click **Search.**

11. From the *Search Results*, select the **desired plant** option.

12. Click **OK** to return to the ***Create Order*** screen.

    Note: If the warehouse or plant is manually selected, NCFS prioritizes this selection. If not, the system automatically assigns a warehouse or plant based on item configuration.



Create a Sales Order – Sales Order Line: Price Adjustment

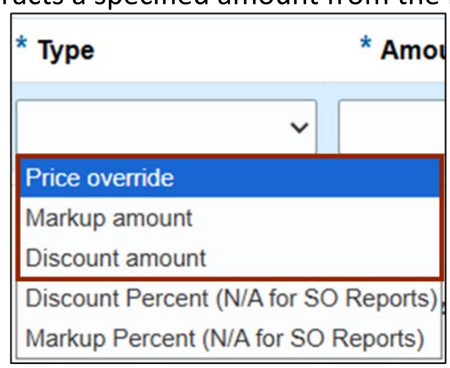
Once an item is added to the *Order Lines* table, a frequent task is updating item prices. For example, custom items are priced at $0 and need to be updated as per the customizations. Updating prices confirms the order reflects accurate charges for each item, which is essential for correct billing.

To update pricing for items from the **Lines** tab, follow these steps:

1. Within *Your Price* column *of the Order Lines* table, click the **pencil icon** next to price.
2. In the ***Edit Item Price: Line 1*** pop-up window, click the *Type* drop-down field and select the **appropriate price adjustment type** from the list (e.g., Price Override).

   Note: Three adjustment options are available: **Price Override**, **Markup Amount***,* and **Discount Amount.**

   - **Price Override:** Replaces the price from the price list. If multiple overrides are added, the most recent one applies.
   - **Markup Amount:** This is commonly used to add extra cost to an item, increasing the final price.
   - **Discount Amount:** Subtracts a specified amount from the base price of an item.

3. In the *Amount* field, enter the **adjustment amount** (e.g., 100).
4. Click the *Reason* drop-down field and **select the appropriate reason for the adjustment** from the list (e.g., Customizations).

   Note: While NCFS offers multiple price adjustment reasons, for DAC the following reasons have been added: **Customizations**, **Flash Drive Delivery**, **Installation Fees**, **Rush Fees**, **Setup Fees**, and **Tailoring Fees**.

   Once all required fields are completed, NCFS populates the ***Adjustment*** column below the *Price Adjustments* section to display the adjustment amount related to the selections.

   Additionally, below the rows is a total amount for the **List Price**, **Automatic Adjustments**, **Manual Adjustments**, and **Net Price**.

   Note: As many adjustments can be added or deleted, as needed.
5. Click the **Add Adjustment** button to add another price adjustment line.

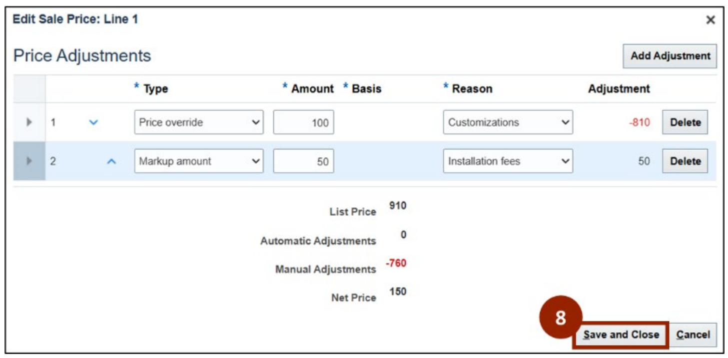
6. Complete each of the fields according to the **new price adjustment** (e.g., Markup amount, 50, Installation fees).

   Note: The newly added **Price Adjustment** line is automatically calculated and reflected within the **List Price**, **Automatic Adjustments**, **Manual Adjustments**, and **Net Price**.

   In some cases, another price override may need to be added to the **Price Adjustments** for this item. If a price override is added on lower adjustment line, the latest price override adjustment takes priority.

7. Click the **Delete** button on the desired row to delete an added price adjustment.

8. Once all changes have been made to the ***Edit Price Item: Line 1*** pop-up window, click the **Save and Close** button.



Create a Sales Order – Submit an Order

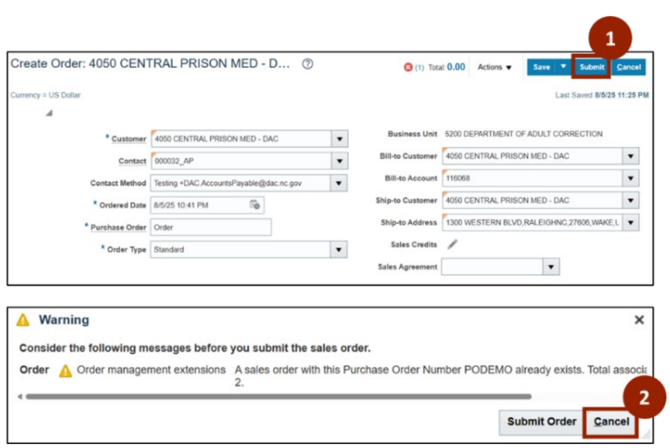
Once outlined information has been completed and the order is ready for submission it is time to submit the order.

To submit the order from the ***Create Order*** screen, follow these steps:

1. Click the **Submit** button.

   Note: A ***warning*** or ***error*** pop-up window may appear with the message along with specific details related to the order selections.

2. (Optional) If changes need to be made based on the warning or error, click **Cancel** to adjust the selections and resubmit.

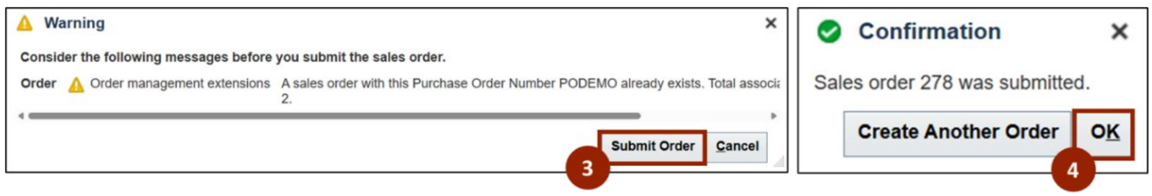


3. Click the **Submit Order** button.

   Note: If the same *Purchase Order* is used across multiple sales orders, a warning message will display with the *Purchase Order Number* along with the count of sales order duplicates.

   Once submitted, a ***Confirmation*** pop-up window displays with the options to **Create Another Order** or click **OK** to return to the recently submitted order.

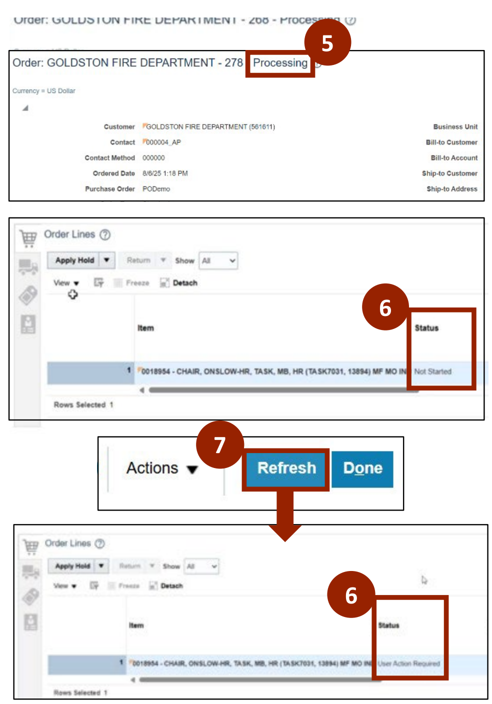
4. Click **OK.**



5. Once submitted, *Order Header Status* and *Lines* are updated. Order Header Status is updated from “**Draft**” to “**Processing**”.

6. The *Order Lines Status* column will change throughout the order fulfillment process.

7. To refresh the information to display the most recent updates to the sales order, within the ***Create Order*** screen, click the **Refresh** button the ***Create Order*** screen.



Wrap-Up

NCFS users can follow the steps above to create sales orders within the NCFS system.

Additional Resources

Instructor Led Training (ILT)

- MFG114: Manage Sales Orders 2

Web-based Training (WBT)

- MFG100: Introduction to NCFS Manufacturing
- MFG101: The Journey Through NCFS Manufacturing