Order Entry

For Custodial Supplies Warehouse and Annex

These steps partner with the visual guide found on following pages: page 4.

Check for availability of items before placing your order. You can run the DW4001 Inventory Information Report from your BusinessPLUS dashboard. If you are unsure about availability, please contact the Warehouse at 775-348-0295.

To get started, click the grey + sign

1. Select the **Order ID number**
    a. SIORDERN for Custodial Supplies Warehouse
    b. SI.ANNEX for the Annex Warehouse
    c. Always write your order number down for your records
2. Type a **Description**
    a. You can type whatever you like: custodian, custodian supplies, etc.
3. Choose the **Primary Warehouse**
    a. CUST for the Custodial Supplies Warehouse
    b. ANNX for the Annex Warehouse
    c. PPE for no-cost PPE items
4. Select a **Security Code**
    a. This may be auto filled for you, if not, use the pull-down to select the correct code
    b. When placing a PPE order, the Security Code will also be PPE
5. Select a **Required Date**
    a. Choose a date that you would like your items delivered
6. Type your **Customer ID**
    a. This is your 3-digit site RC number
7. Type your phone number in the **Contact** field
    a. This will help folks contact you if they have questions about your order
8. Type the **End Use**
    a. This will help identify where your order should end up
    b. You can type whatever you like: custodian, custodian supplies, etc.
9. Click on the **Items tab**
10. Type the **Quantity Ordered**
    a. Be sure to pay attention to how the warehouse catalog has items grouped in per unit quantities
11. Type the **Product ID**
    a. You can free type in this field or use the look-up to browse the catalog listings
    b. After typing in the Product ID, make sure the **Description field** matches what you want to order. If it does not, correct the Product ID.
12. Type the **Account number**
    a. Type the fully qualified NL account number
    b. For Custodial Warehouse Supplies: 10-000-2610-66100-xxx-0514 (xxx is your 3-digit site RC)
    c. For Annex Warehouse: 10-000-2610-66100-xxx-0550 (xxx is your 3-digit site RC)

13. Hit **Enter** on your keyboard
    a. You will get a Record Accepted message in the upper right-hand corner
        i. If you get an error message, read it carefully and reach out to the Business Process Trainer if you have questions
    b. This saves the order and your Item Number 1
    c. This moves you to Item Number 2

Repeat steps 10-13 as needed.

Once all line items are in, and you have **hit Enter for a final time** (getting a final Record Accepted). To submit your order into workflow, complete these steps that also partner with the visual guide found at the end of the job aid (pages 6-14)

- Look to the **left-hand side bar**
- Expand the menu by **clicking on the equal sign (=) at the top**
- Click on **Pending Tasks** to approve your order forward
- If you want a PDF or printed version of your order, run the DW4000 Order Item Information Report

Warehouse Order Entry

Check for availability of items before placing your order. You can run the DW4001 Inventory Information Report from your BusinessPLUS dashboard. If you are unsure about availability, please contact the Warehouse at 775-348-0295.

Navigating to your order screen:

BusinessPlus — Create/Update Orders (SIOEUB)

Add

Order ID:* **1**
Description:* **2**
Year:* NONE
Skip this field

Status:* NW
Pri Warehouse:* **3**
Security Code:* **4**
Route:

Sec Warehouse:
Price Code:
Order Total: 0.00

Main | **Items 9**

Requested By:* Kelly L Case
Requested Date: 07/16/2021
Required Date: **5**

Approved By:
Approval Date:

Customer ID:* **6**

Addr:

Contact: **7**
End Use: **8**
Customer PO:
Misc:

Prep ID:* KLCASE
Transaction Code:* OE
Pick Ticket:
Transaction Frmt:* NB

Purchasing PR:

Order Codes

Order Code 1:
Order Code 2:
Order Code 3:
Order Code 4:

Order Code 5:
Order Code 6:
Order Code 7:
Order Code 8:

Order Code 9:
Order Code 10:

Main | **Items 9**

Add

Line Number: 0001
Sequence: 0
Line Status:* NW
Units:

Warehouse:
Quantity Ordered: **10** 0 — Start with your first item here
Product ID:* **11**
Description:

+ Add Account
Total: 100.00% Remaining: 0.00%

13 After you type the account number, hit ENTER on your keyboard

Account | Percent

NL | FUND | PRGM | FUNC | OBJ | RC | DEPT | JL | JL KEY | ... | 100.00 | Delete
12

Price Code:
Quantity Available: 0
Unit Price: 0.00000
Total Price: 0.00000

Main | **Items**

Next item entry (item #2)

Add

Line Number: 0002
Sequence: 0
Line Status:* NW
Units: RM

Warehouse: WHS1
Quantity Ordered: **10** 0
Product ID:* **11**
Description:

+ Add Account
Total: 100.00% Remaining: 0.00%

13 The account number is already here for you, just hit ENTER

Account | Percent

NL | 10 | 000 | 2510 | 66111 | 008 | 0000 | JL | JL KEY | TASK | ... | 100.00 | Delete
12

Price Code:
Quantity Available: 0
Unit Price: 0.00000
Total Price: 0.00000

Tips to navigate within your order

Add

Line Number: 0003
Warehouse: WHS1

Units: RM
Description:

+ Add Account

Account | Percent

NL ▼ | 10 | 000 | JL ▼ | JL KEY | TASK | ... | 100.00 | Delete

Price Code: | 0.00000 | Total Price: | 0.00000

Total: 100.00% Remaining: 0.00%

Single Record View Controls

Symbol	Description
☰	Switch to Grid view.
<	Go to previous record. If there are no previous records, this button is blocked.
>	Go to next record. If there are no additional records, this button is blocked.
+	Add a new record.
⊙	Back to grid from Add mode.
🗑	Delete current record.
⧉	Copy current record.
📋	Paste record.

Main | Items

GRID MODE

Edit

☑ ▾	Line Number	Quantity Ordered	Units		Unit Price	Total Price	Quant
✏	0001	1	RM		5.65922	5.65922	
✏	0002	1	RM		2.57898	2.57898	

⇄ Switch to Search Results

1 - 2 of 2 Records

Single Record View Controls

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⊙	Back to grid from Add mode.
🗑	Delete current record.
⧉	Copy current record.
📋	Paste record.

Main | Items

Edit 2 of 2

Line Number: 0002
Warehouse: WHS1

Sequence:
Quantity Ordered:

RM
COPIER PAPER,WHITE LETTER SIZE

+ Add Account

Total: 100.00% Remaining: 0.00%

Account | Percent

NL ▼ | 10 | 000 | 2510 | 66111 | ... | 100.00 | Delete

Price Code: | Quantity Available: 1,569 | Unit Price: 2.57898 | Total Price: 2.57898

Single Record View Controls

Symbol	Description
☰	Switch to Grid view.
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