



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:

The screenshot shows the BusinessPLUS dashboard for a user named Kelly L. Case. The left sidebar contains a menu with various system modules. The main content area is titled 'SCHOOL ANNEX' and shows a 'Workflow Tasks' section with links to 'PR: Purchase Request Approval (4)' and 'SI: Stores Inventory Approval (2)'. Below this is an 'Annex' section with three links: 'SIOEUB Create/Update Orders' (highlighted with a red box and a red circle with the number 2), 'SIRESRPC Product Catalog', and 'Annex Supply Catalog'. To the right of the 'Annex' section is a 'Reports' section with several links, including 'DW4000: Order Item Information', 'DW4001: Inventory Information', 'DW4002: Stores Inventory Approval Status', 'DW3000C: Budget to Actual - Custodial Accts', 'SI1002: SI Product Use Comparison', and 'DW4003: Surplus Product Catalog'. A red box and a red circle with the number 1 highlight the 'SCHOOL ANNEX' link in the top navigation bar.



The screenshot shows the 'Create/Update Orders (SIOEUB)' screen in the BusinessPLUS system. The top navigation bar includes the BusinessPLUS logo and the title 'Create/Update Orders (SIOEUB)'. The left sidebar contains a search bar and a 'Filters' section. The main content area has a form with various fields for entering order information, including 'Order ID*', 'Description*', 'Year*', 'Status*', 'Pri Warehouse*', 'Security Code*', 'Route*', 'Sec Warehouse:', 'Price Code:', and 'Order Total:'. A red box and a red circle with a plus sign highlight the '+ sign to start order entry' button in the top left corner of the form area.



BusinessPlus Create/Update Orders (SIOEUB)

Order ID* 1 Description* 2 Year* NONE 3 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 Fmt* 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

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

Warehouse: Quantity Ordered: 10 Start with your first item here

Product ID* 11 Description:

+ Add Account

Account

NL FUND PRGM FUNC OBJ RC DEPT JL J L K 13 After you type the account number, hit ENTER on your keyboard

Percent

100.00 Delete

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



Main Items

Next item entry (item #2)

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

Warehouse: WHS1 Quantity Ordered: 10

Product ID* 11 Description:

+ Add Account

Account

NL 10 000 2510 66111 008 0000 JL J L KEY TASK 13 The account number is already here for you, just hit ENTER

Percent

100.00 Delete

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



Tips to navigate within your order

Line Number: 0003
Warehouse: WHS1

+ Add Account

Account

NL	10	000
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Price Code:

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.

Units: RM

Description:

Total: 100.00% Remaining: 0.00%

Percent

JL	JL KEY	TASK	...	100.00	Delete
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0.00000 Total Price: 0.00000

Main Items

GRID MODE

Line Number	Quantity Ordered	Units
0001	1	RM
0002	1	RM

Switch to Search Results

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.

Unit Price Total Price Quant

5.65922	5.65922	
2.57898	2.57898	

1 - 2 of 2 Records

Main Items

Single Record View Controls

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	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.

Line Number: 0002 Sequence:

Warehouse: WHS1 Quantity Ordered:

+ Add Account

Account

NL	10	000	2510	66111
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Price Code: Quantity Available:

RM

COPIER PAPER, WHITE LETTER SIZE

Total: 100.00% Remaining: 0.00%

Percent

...	100.00	Delete
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1.569 Unit Price 2.57898 Total Price: 2.57898