

# Training Guide Stores Inventory

SIOEUB Create/Update Orders



- x Description Enter a general description for the entire order.
- x Year: Will default to NONE or Current Year if Routes are defined.
- x Status: Will default to NW for New Order.
- x Primary Warehouse: Select the warehouse to order from. It is possible to default this value.
- x Sec Cd: Will default to User's default Security Code.
- x Requested By: Will default user's name.
- x Requested Date: Will default to current date.
- x Customer ID Enter PE ID for school or department. This can be set to default based on user login.

The screenshot shows a web-based order entry form. At the top right, there is a green status bar that says "Record(s) Accepted" and "1 of 1". The form contains several input fields and dropdown menus. Four fields are highlighted with red rectangular boxes: "Order ID\*" with the value "SI000018", "Description\*" with the value "Supplies", "Pri Warehouse\*" with the value "WH", and "Customer ID\*" with the value "0121". Other visible fields include "Status\*" (NW), "Sec Warehouse\*", "Price Code\*", "Order Total" (0.00), "Requested By\*", "Requested Date\*" (12/11/2019), "Approved By\*", "Approval Date\*", "Addr." (AZALEA MIDDLE), "Contact", "End Use", "Customer PO", "Misc.", "Transaction Code\*" (OE), "Pick Ticket", and a section for "Order Codes" with fields for Order Code 1 through 10.

Press Enter to save the record when all the required fields are populated.

Click on the Itemstab and enter quantity and Product ID for the items to be ordered.

¾ The system will populate the Unit of Measure, Quantity Available, Unit Price and Total Price for the item once the user tabs out of the Product ID field.

**Required Fields:**

- x **Quantity Ordered:** Enter the quantity for the item being ordered.
- x **Product ID:** Enter the Product ID for the item being ordered. Click the Lookup icon to access the Prod ID Lookup screen if the number is not known.

Product ID\*

Prod ID Lookup

Desc	Prod ID	Desc Upshifted	Unit
CAN WASTE PAPER SMALL BLACK	1302	CAN WASTE PAPER SMALL BLACK	EACH
CONST PAPER 12X18 ASTD COLORS	1134	CONST PAPER 12X18 ASTD COLORS	PKG
CONST PAPER 12X18 BLACK	1132	CONST PAPER 12X18 BLACK	PKG
CONST PAPER 12X18 BLUE	1135	CONST PAPER 12X18 BLUE	PKG
CONST PAPER 12X18 DK BRWN	1138	CONST PAPER 12X18 DK BRWN	PKG
CONST PAPER 12X18 FEST. RED	1140	CONST PAPER 12X18 FEST. RED	PKG
CONST PAPER 12X18 GRN	1143	CONST PAPER 12X18 GRN	PKG
CONST PAPER 12X18 HOL. GREEN	1141	CONST PAPER 12X18 HOL. GREEN	PKG
CONST PAPER 12X18 LT. GREEN	1142	CONST PAPER 12X18 LT. GREEN	PKG
CONST PAPER 12X18 MAGENTA	1143	CONST PAPER 12X18 MAGENTA	PKG

Close Ok

- x **Account** Enter the account to be expensed for the item.
  - o Use the ellipses button to access a Lookup if the account is not known.
  - o The **Add Account** button can be used to get another line if it is necessary to split the expense between two or more GL accounts.
    - ¾ Splits can only be done by Percent.

The screenshot shows a software interface with a '+ Add Account' button highlighted by a red box. To the right, it displays 'Total: 100.00%' and 'Remaining: 0.00%'. Below is a table with columns for 'Account' and 'Percent'. The table contains one row with the following values: GL, 00, 100, 51005100, 0121, 2310, 1013, 00000000, 100.00, and a 'Delete' button.

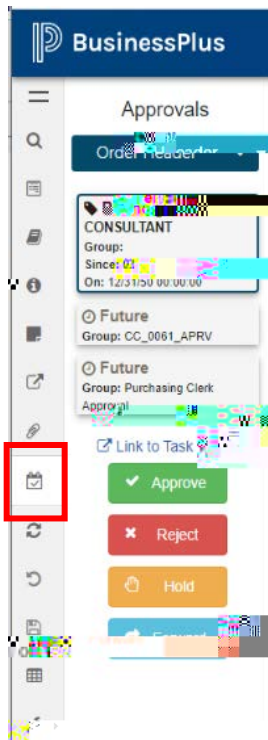
Account								Percent	
GL	00	100	51005100	0121	2310	1013	00000000	100.00	Delete

When all required fields are entered, press enter to save the record. Make sure you get the Record Accepted message.

### Warehouse Approvals

2. Approvals can be done from the **SIOEUB** screen or the **TaskList**. The Order must be fully approved before the warehouse staff can fill the order.

**Screenapproval** - Click the **Pending Tasklist** icon on the sidebar to open the **Approvals** panel. Click the green **Approve** button.





### *Reports*

1244—Order Entry Information — enter an order # and it will pull up that warehouse order.

1249—Open SI Status Report will show you who the next approver is on an order for your location.

1245—Alphabetic Stock Catalog-