I.   **SUBJECT:** How to enter a Sales Order in JD Edwards (JDE)

II.   **PURPOSE:** To document the method in which a sales order is processed by customer service coordinators in JDE.

III.   **PERSONNEL AFFECTED:** Customer Relations Industrial Aftermarket Department

IV.   **RESPONSIBILITIES**: Every Customer Relations Advocate will be responsible for processing orders within 24 hours of receipt of order.

V.   **INSTRUCTION:**

1.   Receipt of Purchase Order

   A purchase order can be received via e-mail, fax, or EDI. Once received, the information on the PO must be verified before beginning to enter the order on JDE.

   a.   Verify the customer is active (Sch Typ 'C') and write correct ship to# on PO.

   b.   Verify the address on PO matches the address associated with the ship to# on the address book.

   c.   Verify the Terms of the PO. (Generally, NET 30 days)

2.   Entering the Sales Order

   a.   To begin, open a Sales Order Entry – Customer Service Inquiry screen and select the Add button. It will bring up the Sales Order Entry – Sales Order Header screen.

   b.   In the Order number field, the 2nd box defaults with an asterisk. Delete asterisk and type "SO."

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3. On tab labeled "Sales Order Header," enter the correct information into the following fields:

- Ship to account # into the Ship To field

- PO # into the Customer PO field

- Print Message into the Print Message field, if necessary

- Name of Requestor into the Ordered By field

Once you are done, place a check mark next to the PO # & add the Ship to account # on the PO to confirm what you entered in JDE matches the PO as shown in CS-IAM-024 How to Scan and Save PO's in JDE.

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4. On tab labeled "Additional Header Information," enter the correct information into the following fields: Policy P-007 can be used as a reference.

- Carrier Number

- Freight Code

a. Please note the all requested Drop-Ship locations will be at Customer's expense – freight paid by customer or end user

b. Once you are done, place a check mark next to the freight / shipping info on the PO to confirm what is in JDE matches the PO as shown in CS-IAM-024 How to Scan and Save PO's in JDE.

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5. Select "OK" once and review – write down sales order number on PO. (Blank fields will auto-populate with information on both tabs)

Sales Order Entry - Sales Order Header

OK   Cancel   Form   Tools

⚠ **Warnings**

Issues (click each label for more information):
▷ Review Order Header Data Before Accept ▷   Go to warning..

Please look for the highlighted fields, correct the entries, and resubmit your request.

Order Number ➡ 2241065   SO   00001

6. Select "OK" again to go into order entry screen

7. Sales Order Entry – Sales Order Detail Revisions

   a. Enter the information from PO into the appropriate fields highlighted below:

   - Quantity to be ordered into the Quantity Ordered field
   - NTN part # into the Item Number field
   - Customer part # into the NTN Customer Part # field, if necessary
   - Request Date into the Requested Date field. The default is same as order date.
   - Appropriate Branch Plant # into the Branch Plant field

Quantity Ordered	Item Number	NTN Customer Part#	Unit Price	Extended Price	Branch/ Plant	Requested Date

   Once line is complete, drop down to the next line and all blank fields will auto-populate. (e.g. Unit Price, Scheduled Pick, Promised Ship Date and Promised Delivery fields auto-populate – do not enter information into these fields)

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b. Once information is entered, electronically put a check mark next to all the information you have entered into JDE, showing it was reviewed and confirmed. Also, check mark the price electronically to confirm what you entered in JDE matches the PO as shown in CS-IAM-024 How to Scan and Save PO's in JDE.

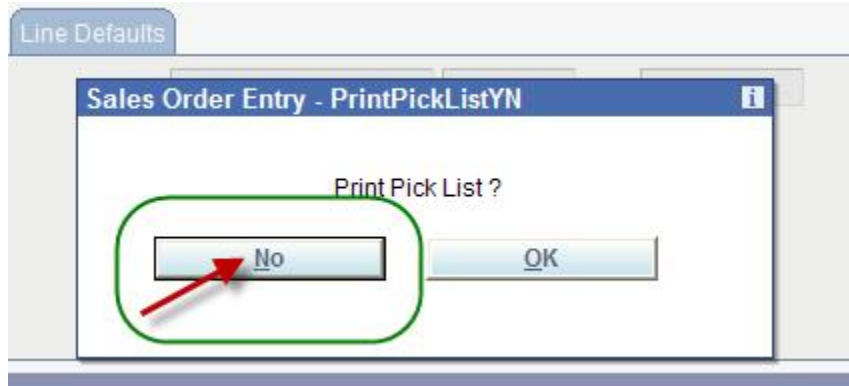c. Once you have verified all the info entered in JDE matches the PO & the order is complete, select "OK"

d. Select "NO" when prompted to print pick list. ****If urgent action is needed at the warehouse (I.e Expedited Shipment, or Invoice only),**

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select OK and order will instantly pick.

  e. Date and initial the PO and file the purchase order electronically as shown in CS-IAM-024 How to Scan and Save PO's in JDE.

  f. Acknowledge entry of the order back to customer by using the electronic Order Acknowledgement (ref CS-IAM-017) or via fax, e-mail, or phone call, when prompted.

VI. **RECORDS:** Electronic files are attached to the order in JDE and are kept there for the duration, which the order is in JDE.

VII. **RELATED DOCUMENTS:** Work Instruction CS-IAM-017_How to Send a Customer an Order Acknowledgement, CS-IAM-024_How to Scan and Save POs in JDE and IAM Order and Shipping Policy_P-007

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