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- 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 2<sup>nd</sup> box defaults with an asterisk. Delete asterisk and type "SO."

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**Sales Order Entry - Sales Order Header**

OK Cancel Form Tools

Order Number  \*

**Sales Order Entry - Sales Order Header**

OK Cancel Form Tools

Order Number  SO

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

Sales Order Header Additional Header Information

Branch/Plant NTN

Messages

Address Numbers

Ship to

Sold To

Customer PO

Print Message  BLANK - Do NOT Remove!

Hold Code  Blank - Hold Codes 42/HC

Tax Area/Code

Tax Certificate No.

Dates

Order Date

Cancel Date

Requested Date

Requested Time

Price Pickslip

Invoice Copies

Ordered By

Taken By

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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 BDI Atlanta ✓ 2154 Eastview Parkway, Suite 300 Conyers GA 30013	www.bdiexpress.com	<b>Purchase Order</b> <div style="border: 2px solid black; padding: 5px; display: inline-block;"> <b>4502345179</b> ✓         </div>
	127029	
BILLING ADDRESS:		PURCHASE ORDER DETAILS:

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

Sales Order Header		Additional Header Information
<b>Pricing and Payment Information</b> Adjustment Schedule: <input type="text"/> Payment Terms: <input type="text"/> Net 30 Days Payment Instrument: <input type="text"/> Trade Discount: <input type="text"/> Cust Price Grp: <input type="text"/>		<b>Freight Information</b> <input checked="" type="checkbox"/> Apply Freight Carrier Number: <input style="background-color: yellow;" type="text"/> Freight Code: <input style="background-color: yellow;" type="text"/> Route Code: <input type="text"/> <small>Std Invoices/Print (non EDI)</small> Stop Code: <input type="text"/> <small>Blank - Stop Code 42/SP</small> Zone Number: <input type="text"/> <small>Region not Specified</small> Display VM: <input type="text"/> Display WT: <input type="text"/> Mode of Trans: <input type="text"/> Reason Code: <input type="text"/>
<b>Credit/Bank Information</b> <input type="text"/> <input type="text"/>		<b>Buying Segment Codes</b> SoldTo Buying Segment Code: <input type="text"/> ShipTo Buying Segment Code: <input type="text"/>
<b>Delivery Instructions</b> <input type="text"/> <input type="text"/>		

- 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.

Terms of Delivery: COL, On Account Number below

Shipping Method: UPS-US Ground ✓  
 UPS ACCT: 070Y19

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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

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"



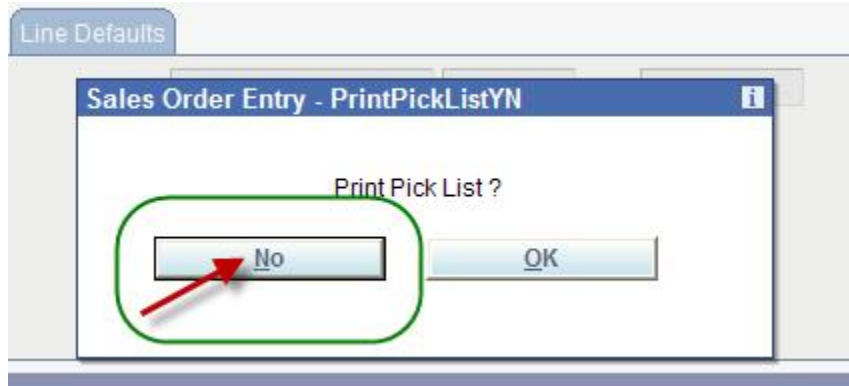
- d. Select "NO" when prompted to print pick list. **\*\*If urgent action is needed at the warehouse (I.e Expedited Shipment, or Invoice only),**

 BDI Atlanta ✓ 2154 Eastview Parkway, Suite 300 Conyers GA 30013		www.bdiexpress.com 127029	<b>Purchase Order</b> <b>4502345179</b> ✓														
<b>BILLING ADDRESS:</b> BDI USA PO Box 458035 Westlake OH 44145 Email: APinvoices@BDIworldwide.com		<b>PURCHASE ORDER DETAILS:</b> Date: 01/24/2020 Currency: USD Terms of Payment: Net 30 days Contact: Jenifer Parham Phone: 770-938-2754 Fax: 770-929-3623 E-Mail: JPARHAM@BDI-USA.COM ✓															
<b>SHIPPING ADDRESS:</b> STANDRIDGE COLOR CORP ✓ TAG: 96576683 - ✓ JIMMY GARDNER 636 ASHLEY DR DOCK 4 SOCIAL CIRCLE GA 30025 Terms of Delivery: COL, On Account Number below Shipping Method: UPS-US Ground UPS ACCT: 070Y19 ✓		<b>VENDOR ADDRESS: 132765</b> NTN BEARING 1600 BISHOP CT MOUNT PROSPECT IL 60056-6055 Vendor Contact: NTN MOUNT PROSPECT IL Phone: 8003232358 Fax: 8472941205 E-Mail: custservice@ntnusa.com															
\$250 MINIMUM \$50 MINIMUM ONLINE		<b>APPROVED</b> By RFORBES at 2:14 pm, Jan 24, 2020															
<table border="1"> <thead> <tr> <th>Line No</th> <th>Material/Description</th> <th>Quantity</th> <th>U/M</th> <th>Delv. by Date</th> <th>Unit Price</th> <th>Net Amount</th> </tr> </thead> <tbody> <tr> <td>10</td> <td>Material No: 17140718 NTN 24028EMW33C3 SPHR ROLLER BEARING 140MM ID X 210MM OD X 69MM WD MPN: 24028EMW33C3 ✓</td> <td>2.00 ✓</td> <td>EA</td> <td>01/29/2020</td> <td>740.86 / EA</td> <td>1,481.72 ✓</td> </tr> </tbody> </table>				Line No	Material/Description	Quantity	U/M	Delv. by Date	Unit Price	Net Amount	10	Material No: 17140718 NTN 24028EMW33C3 SPHR ROLLER BEARING 140MM ID X 210MM OD X 69MM WD MPN: 24028EMW33C3 ✓	2.00 ✓	EA	01/29/2020	740.86 / EA	1,481.72 ✓
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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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