I. **SUBJECT:** How to enter off the shelf Sample Order in JD Edwards (JDE)

II. **PURPOSE:** To document the method in which an off the shelf sample order is processed by Customer Relations Advocate in JDE.

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

IV. **RESPONSIBILITIES**: IAM Customer Relations Customer Relations Advocate (CRA) is responsible for processing all off the shelf sample orders for all of IAM through JDE.

V. **INSTRUCTION:**

1. When a Sample is requested to be shipped to an IAM Distributor, the Territory Manager (TM) must enter an Opportunity in Connect 2.0, (see quick reference guide in connect library).

2. After doing so, the TM creates a task that will alert the CRA that action is needed on their part.

Revision Date	Description

Printed copies should be checked against the master electronic version in Lotus Notes.

Printed on 05/22/24

3. The CRA reviews the request and determines whether the part # is a stocking part. This is determined by available stock located in Branch Plants (BP) 15, 11 or 19: respectively Norcross, GA, Whitestown, IN or Reno, NV. The CRA could also pull from BP 35, Macomb, IL if the inventory has the [M100] or [H100] pack code, indicating the inventory is 1x1.

    .

4. Regardless as to whether the part number is available or a work order needs to be created in order to make the part available, the Task is sent via Lotus Notes to the both CRA who manages the account and the CRA responsible for entering and processing the Sample Request.

	Primary Supplier	Stock Type	Branch Plant	2nd Item Number	NBCA Item Number	Quantity Available	Quantity On Hand	Quantity On P.O.
⦿	15	M	15	SUC205-16FG1	SUC205-16FG1	71	71	
○	15	P	19	SUC205-16FG1	SUC205-16FG1	3	3	
○			ITEM ...	SUC205-16FG1		74	74	
○	134501	J	15	SUC205-16FG1/PA205	SUC205-16FG1/PA205			
○			GRAN...			74	74	

5. Upon receipt of the Task, the Sample Order is to be entered in JDE.
    a. To do so, go to the Sales Order Inquiry - Customer Service Inquiry screen and select the 'Add' button. It will bring up the Sales Order Entry – Sales Order Header screen.

WARDS ENTERPRISEONE

Sample Orders - Customer Service Inquiry

Select   Find   Add   Copy   Close   Form   Row   Tools

Customer Service Inquiry | Additional Selections
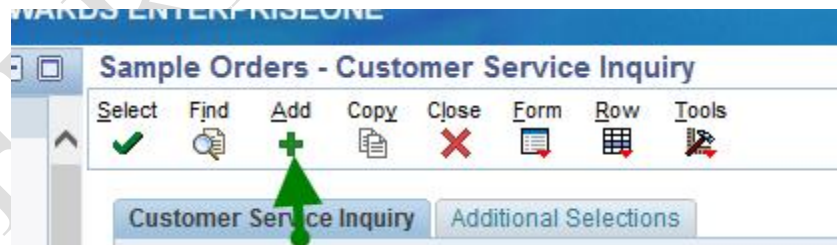
** In the Order number field, the 2nd box defaults with an SA. Do not change it as this stands for a SAample order type.

Sample Orders - Sales Order Header

OK   Cancel   Form   Tools

Order Number | | SA | 00001 |

Sales Order Header | Additional Header Information

Printed copies should be checked against the master electronic version in Lotus Notes.

Revision Date

Printed on 05/22/24

6.   On the tab labeled "Sales Order Header", enter the following information into the fields as shown:

- Ship To Account number into the 'Ship To' field

- Enter the Opportunity number into the Customer PO field or if it is a show and tell sample, enter the TM's name in this field

7.   On the tab labeled "Additional Header Information," enter the correct information into the following fields:

- Carrier Number will be either 181603 for Best Way Today Sure or 27707 for Fed Ex Priority (Urgent requests only)
  - *Manager approval is required for Expedited Shipping if NTN is paying*

- Freight Code will always be '2' for Prepaid and Absorb

- If delivery instructions are necessary, enter under "Delivery Instructions" field on the Additional Header Information tab

Revision Date	Description

Printed copies should be checked against the master electronic version in Lotus Notes.

Printed on 05/22/24

Freight Information

☑ Apply Freight

Carrier Number	181603	BEST WAY TODAY
Freight Code	2	Prepaid & Absorb
Route Code		Std Invoices/Print (non EDI)
Stop Code		Blank - Stop Code 42/SP
Zone Number		Region not Specified
Display VM		.
Display WT		.
Mode of Trans		.
Reason Code		Blank DO NOT DELETE

Buying Segment Codes

SoldTo Buying Segment Code

ShipTo Buying Segment Code

Delivery Instructions

8. Select "OK" once and review (blank fields will auto-populate with information on both tabs).

Sample Orders - Sales Order Header

OK   Cancel   Form   Tools

Order Number

⚠ **Warnings**

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

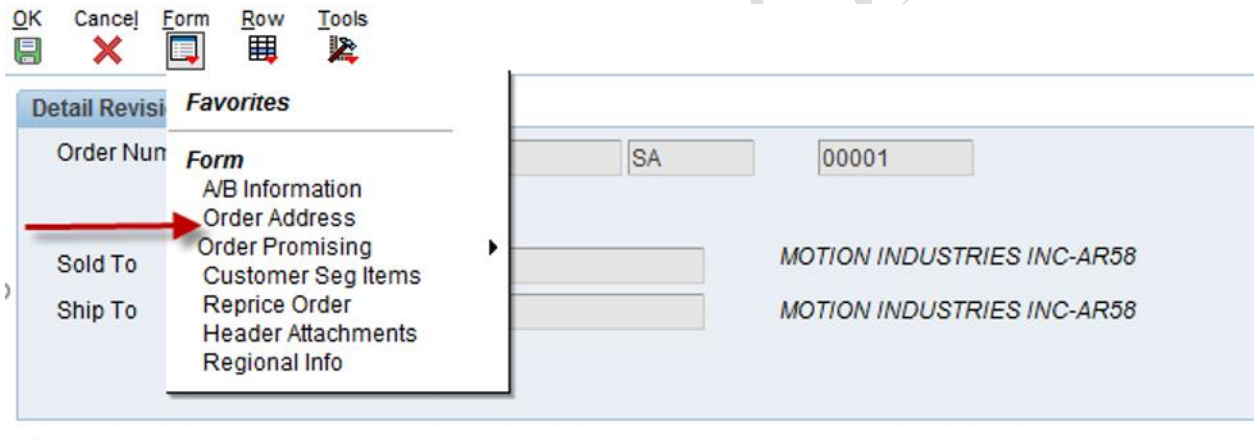Please look for the highlighted fields, correct the entries, and resubmit your request.

Order Number ➡ 12944   SA   00001

he following warning will pop-up. This is a 'soft' warning that pops up just to remind you to double check the information you have already entered.

10. Select "OK" again to go into the line item detail screen

11. If the TM wants to sample to ship somewhere other than the customer branch, right click on 'Form' and then 'Order Address' to change the Shipping Address.

a. Delete the auto-populated customers' address and enter the requested ship-to address.

Revision Date

Printed copies should be checked against the master electronic version in Lotus Notes.

Printed on 05/22/24

rder Entry – Sales Order Detail:

a. Enter the information from Sample order Task into the appropriate fields:

   i. Quantity to be ordered into the Quantity Ordered field

   ii. NTN part # into the Item Number field

   iii. Request Date into the Requested Date field

   iv. Appropriate Branch Plant # into the Branch Plant field

13. Once the detail 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)

Revision Date	Description

Printed copies should be checked against the master electronic version in Lotus Notes.

Printed on 05/22/24

Unit Price	Extended Price	Branch/ Plant	Requested Date	Promised Delivery	Promised Ship Date	Scheduled Pick
✕				✕	✕	✕

14. Once all the information is entered and since these are no charge samples, right Click on the box at the very beginning of the line and click Zero price and the price field will zero out.

15.

		Quantity Ordered		UoM	Secondary Quantity	Secondary UoM	Item Number
☐	✎						
			2	EA	2	EA	SUC205-16FG1

Favorites

Row
  SOE - Additional
  Check Price
  Price History

  Supply/Demand

  Detail Attachments
  Availability

  Customer Seg Items

  Zero Price ←
  Bypass New Line

  Confg Related Order
  Confg Generic Text
  Matrix Order
  Segmented Item

Item Number	Purchase Order Line Number	Ln Ty	Unit Price	Extended Price
SUC205-16FG1		S	.0000	
		S		

12 thru 14 for any additional parts / lines.

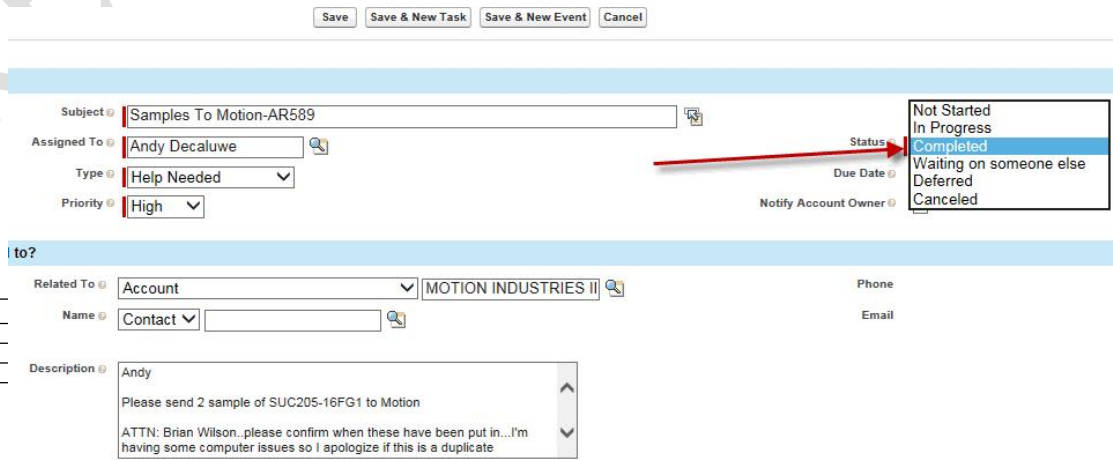16.   When the order is complete, select "OK"
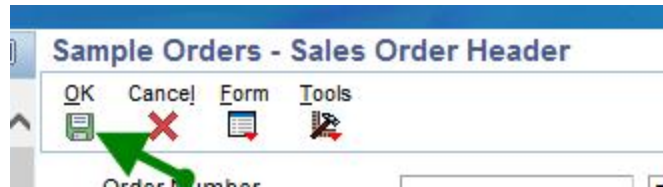
17.   Once the order is complete in JDE, you must go back into Connect 2.0 to
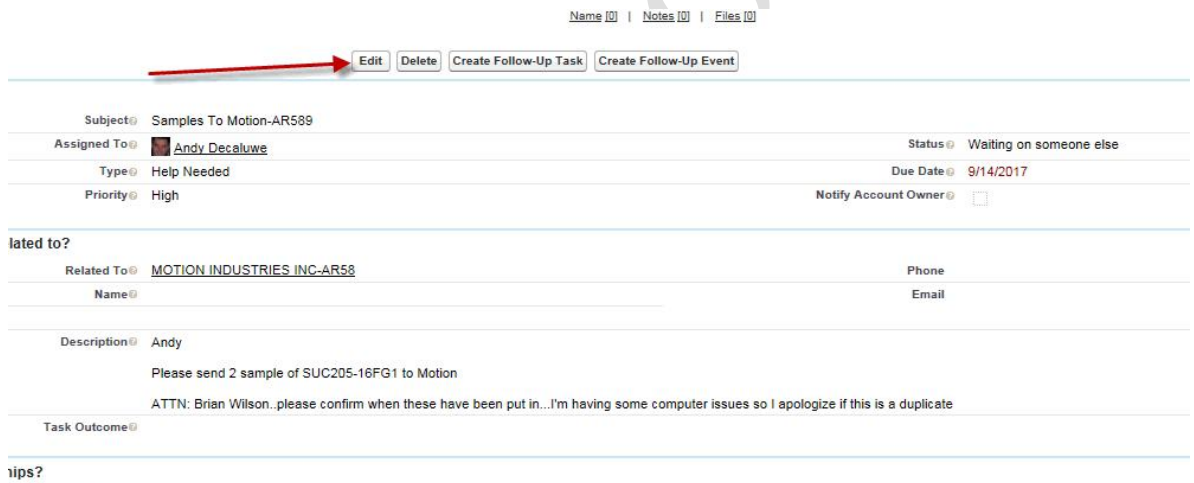
sk and Click edit.

18.   Change the status to 'Completed'.

Revision Date

edge entry of the order back to TM by e-mail, or phone call, or via the Connect 2.0 Task

VI.   **RECORDS:** N/A

VII.   **RELATED DOCUMENTS:** N/A

Revision Date	Description

Printed copies should be checked against the master electronic version in Lotus Notes.

Printed on 05/22/24