

BusinessPLUS

Creating Stores Orders

SIOEUB

WHO SHOULD REVIEW THIS

- Staff processing Stores Inventory Orders

NOTE

- For additional Training resources, visit **OCDE-Docs-SharePoint** on Shoreline, Finance Folder, Training, BusinessPlus Training Videos, Stores-Inventory

TOPICS COVERED INSIDE

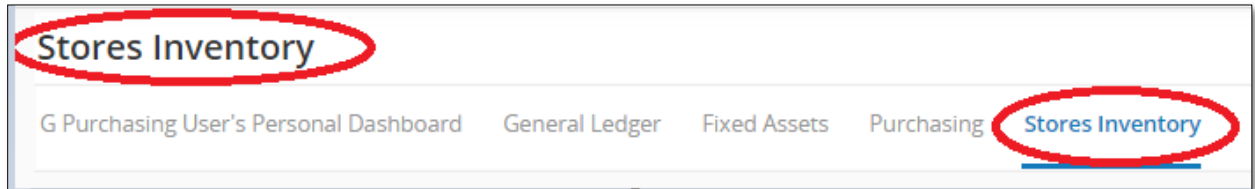
- Accessing SIOEUB
- Creating a Stores Order
- Approving SI Order in Workflow



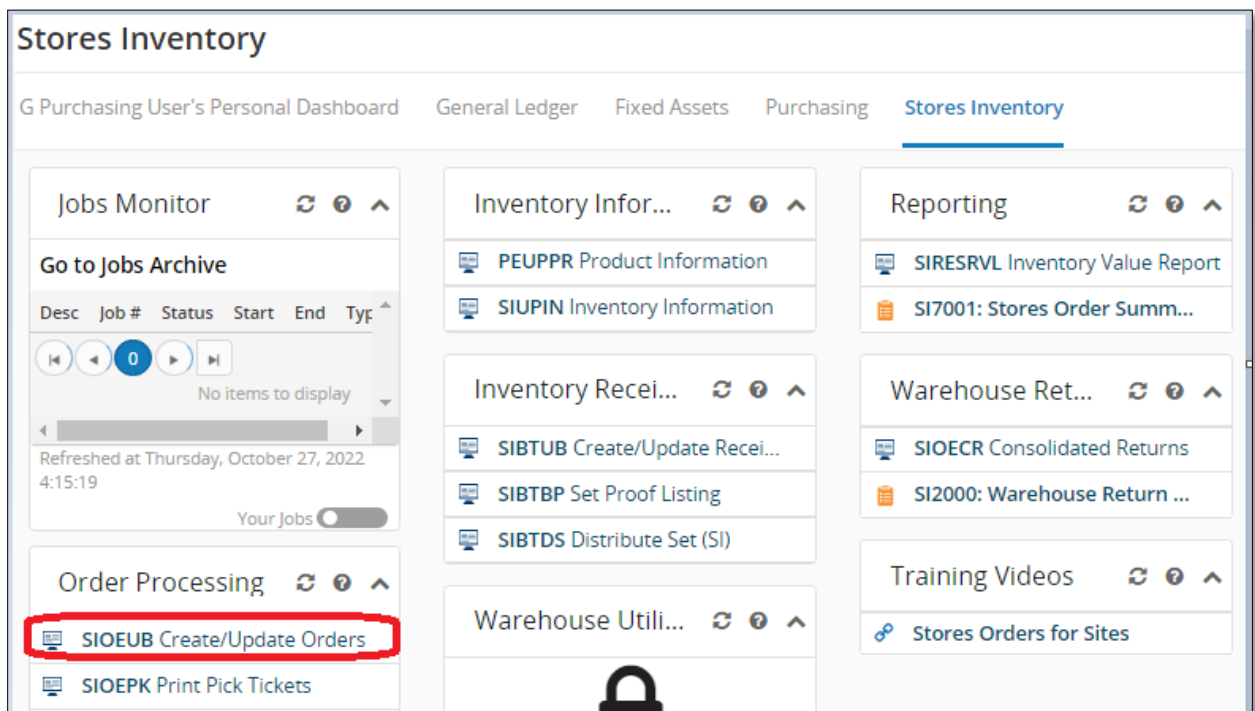
Creating a Stores Order from the SIOEUB Module

Step 1 – Accessing the Stores Order Screen

Select the Stores Inventory tab from the Personal Dashboard Page.



Select **SIOEUB Create/Update Orders** module under *Order Processing*.



This will launch the module as shown below.

The screenshot shows the BusinessPlus interface for 'Create/Update Orders (SIOEUB)'. On the left, there is a search sidebar with a search bar, 'Apply Search' and 'Clear Criteria' buttons, and a 'Filters' section with a checkbox for 'NewAndPendingOr...'. The main area features a grey plus sign at the top left. Below it are several input fields: Order ID*, Year*, Pri Warehouse*, Route, Price Code, Description*, Status*, Security Code, Sec Warehouse, and Order Total (0.00). At the bottom, there are tabs for 'Main' and 'Items', and fields for Requested By*, Requested Date*, Required Date, Approval Date, Approved By, and Customer ID*.

Step 2 – Creating a Stores Order

The module will open into a “**Search**” mode. Select the grey plus sign to go into an “**Add**” mode.


This close-up shows the search sidebar on the left with the 'Search' label and 'Apply Search' and 'Clear Criteria' buttons. To the right, a grey plus sign is highlighted with a red box, indicating the button to switch to 'Add' mode.

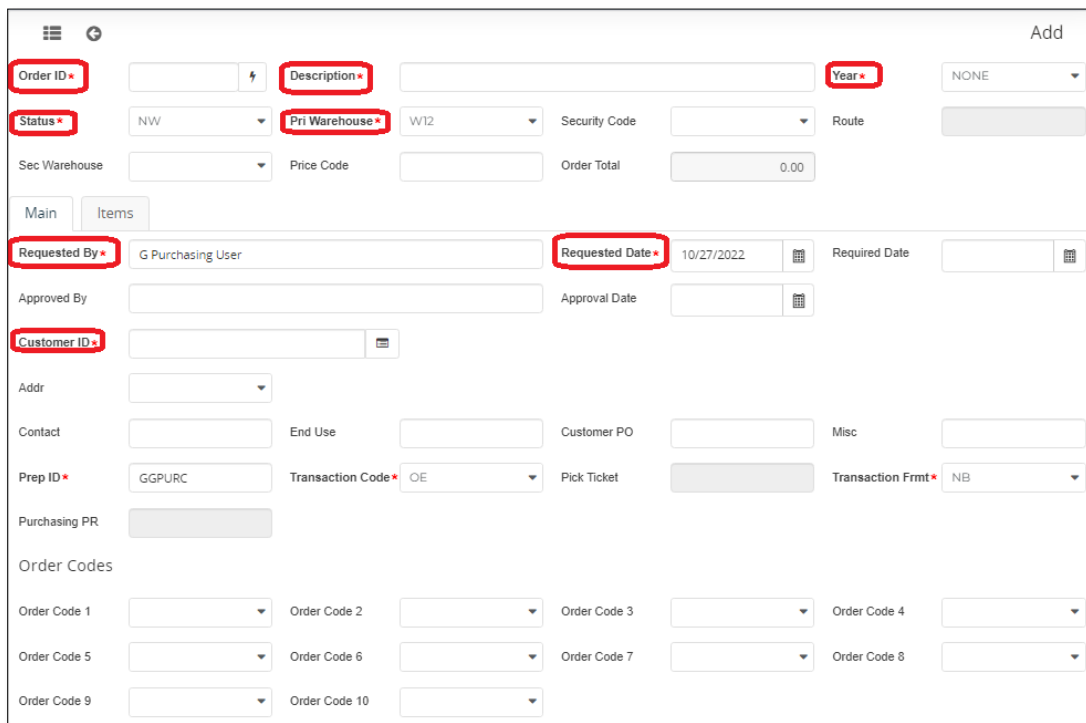
You will get an indicator that you are in “**Add**” mode by looking in the top right corner and seeing “**Add**.”

This screenshot shows the same module but in 'Add' mode. The top right corner now has a red box around the word 'Add'. The input fields are populated: Order ID* is empty, Year* is 'NONE', Pri Warehouse* is 'W12', Status* is 'NW', and Order Total is 0.00. The 'Main' tab is selected.

Step 3 – Creating the Stores Order

The required fields will be **bolded** followed by a **red asterisk (*)**. There are fields that default in such as: Year, Status, Pri Warehouse, Requested By, and Requested Date. The required fields the user will need to fill in are as follows:

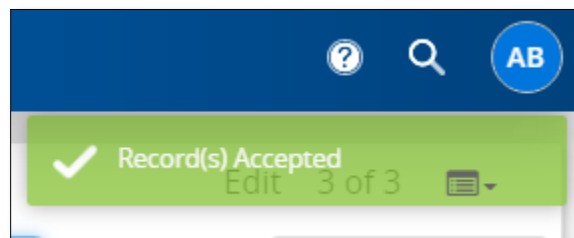
1. **Order ID:** Click on the lightning bolt, , and select (AUTO [SI.X]) to generate the next available Stores Order number.
2. **Description:** Enter up to thirty (30) characters to describe the stores order. Continue to follow your districts business rules for the stores order's description field.
3. **Customer ID:** Enter the Ship to ID for the School Site to which the order will be charged. Ship to ID's start with a "S" (i.e. SLL00001 where LL is the ledger)



The screenshot shows a software interface for creating a Stores Order. The form is divided into several sections. The top section contains fields for Order ID*, Description*, and Year*. Below this are Status* (set to NW), Pri Warehouse* (set to W12), Security Code, and Route. The next section includes Sec Warehouse, Price Code, and Order Total (0.00). The middle section has Requested By* (G Purchasing User) and Requested Date* (10/27/2022). Below that are Approved By and Approval Date. The Customer ID* field is empty. The bottom section includes Addr, Contact, End Use, Customer PO, Misc, Prep ID* (GGPURC), Transaction Code* (OE), Pick Ticket, and Transaction Frmt* (NB). At the very bottom, there are ten Order Code fields (Order Code 1 through Order Code 10).

Saving the Header and Main Tab


After the entries have been made on the HEADER record press the ENTER key on your keyboard to save the entries. A green "Record(s) Accepted" message (shown below) will be displayed at the top right corner of the screen.

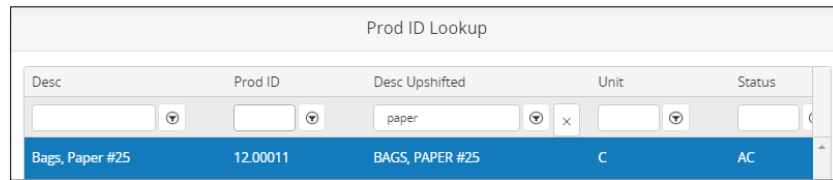


Note: The system will not auto-tab you into the “Items” tab, you will need to manually click on the “Items” tab to begin your entries.

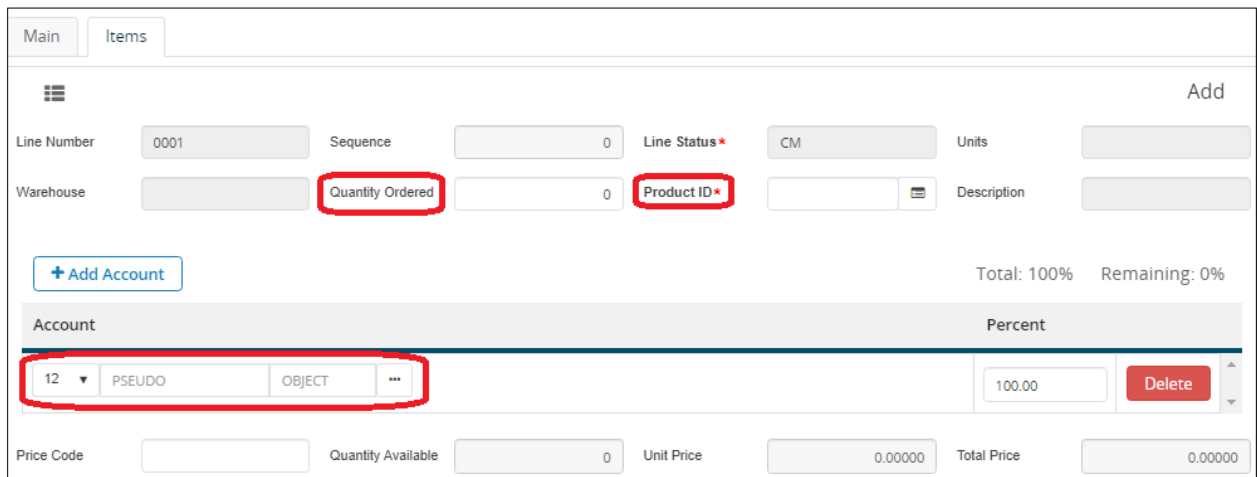
Step 4 – Entering Items on Stores Order

Required fields user will need to fill in are as follows:

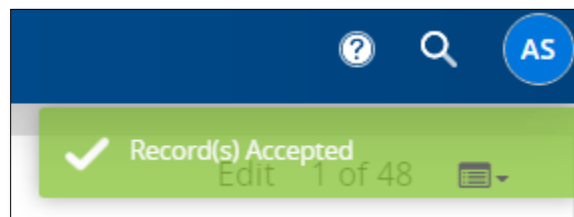
1. **Quantity Ordered:** Enter the quantity of the product being ordered.
2. **Product ID:** Enter the Product ID of item being ordered.
 - a. To look up a Product ID, select the lookup icon () which will launch the lookup dialogue box that you can then double click or select and click ok to pull into the Product ID field.



3. **Account:** Enter the Account Code combination (either Pseudo-Object or Fully Qualified Account) to which the cost of this product will be posted to. The Account Number entered on item 1 will carry over to the remaining items until the user changes it.



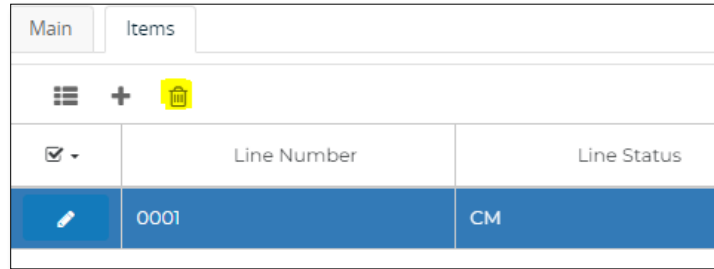
After the item information has been entered, press the **ENTER** key on your keyboard to save the record and receive the green “Record Accepted” message in the top right corner of the screen. User may continue to add items to the order or approve the order in workflow.



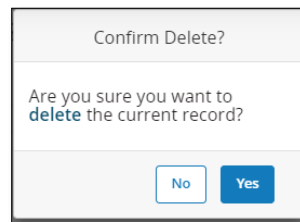
Deleting Items on Stores Order

If an item is entered on a Stores Order that needs to be deleted, the user can click on the item and select the Trash Can Icon under the Items tab which will prompt another dialogue box asking if the user wants to delete the record.

Note: This can only be processed prior to approving in Workflow. Once approved in Workflow, user can no longer delete an item on a Stores Order.

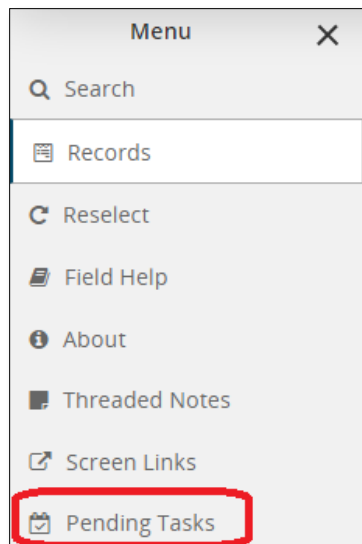


	Line Number	Line Status
	0001	CM



Step 5 – Approving Stores Order in Workflow

After all items have been added for the Stores Order, the stores order must be approved. User can approve the stores order by clicking on the side menu and selecting the “Pending Tasks” option.



From here the user will be able to “Approve” the stores order which will launch a comment box to input additional comments then click “Submit” to complete approval process.

