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

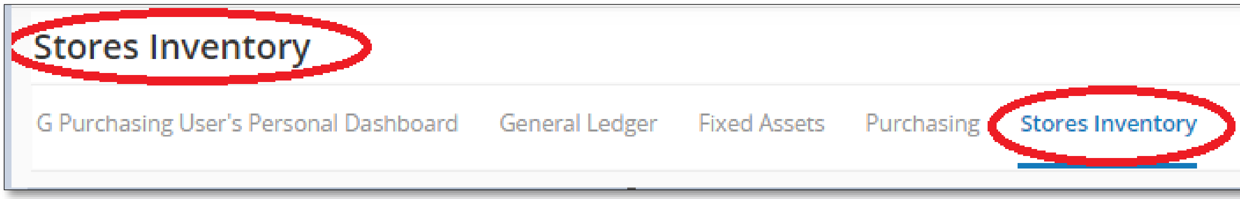
September 2023

ORANGE COUNTY DEPARTMENT OF EDUCATION

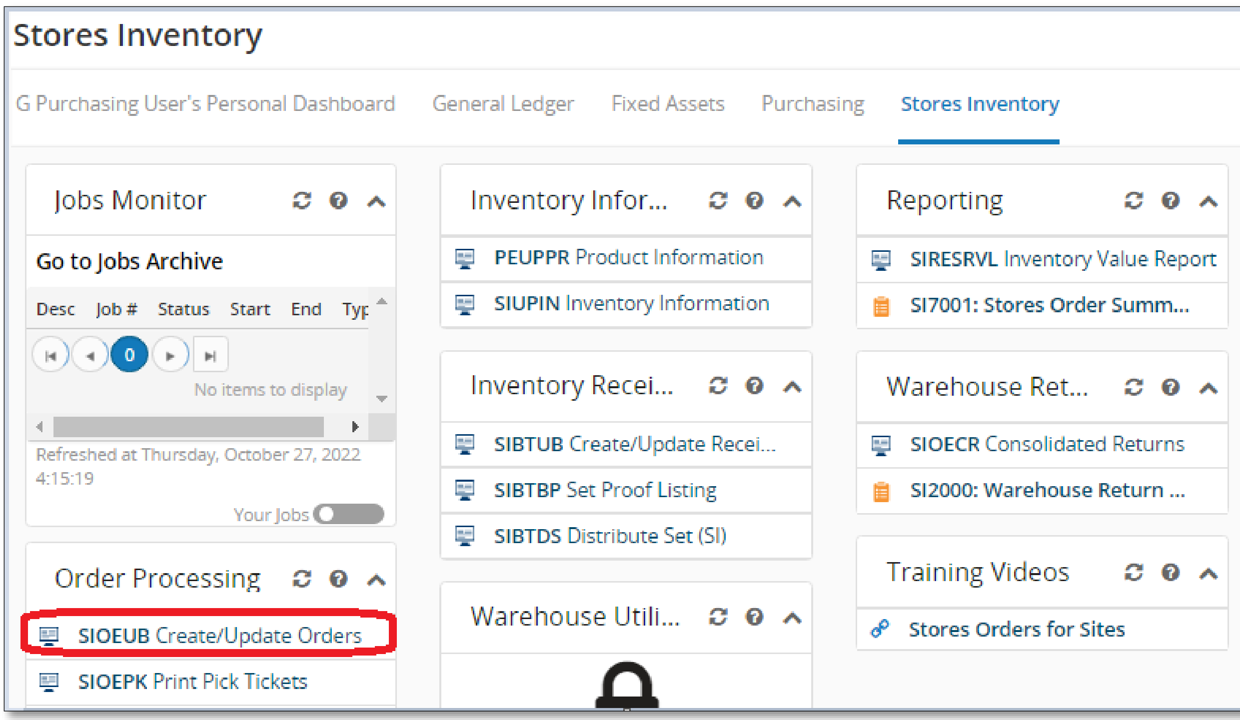
Creating a Stores Order from the SIOEUB Module

Step 1 – Accessing the Stores Order Screen

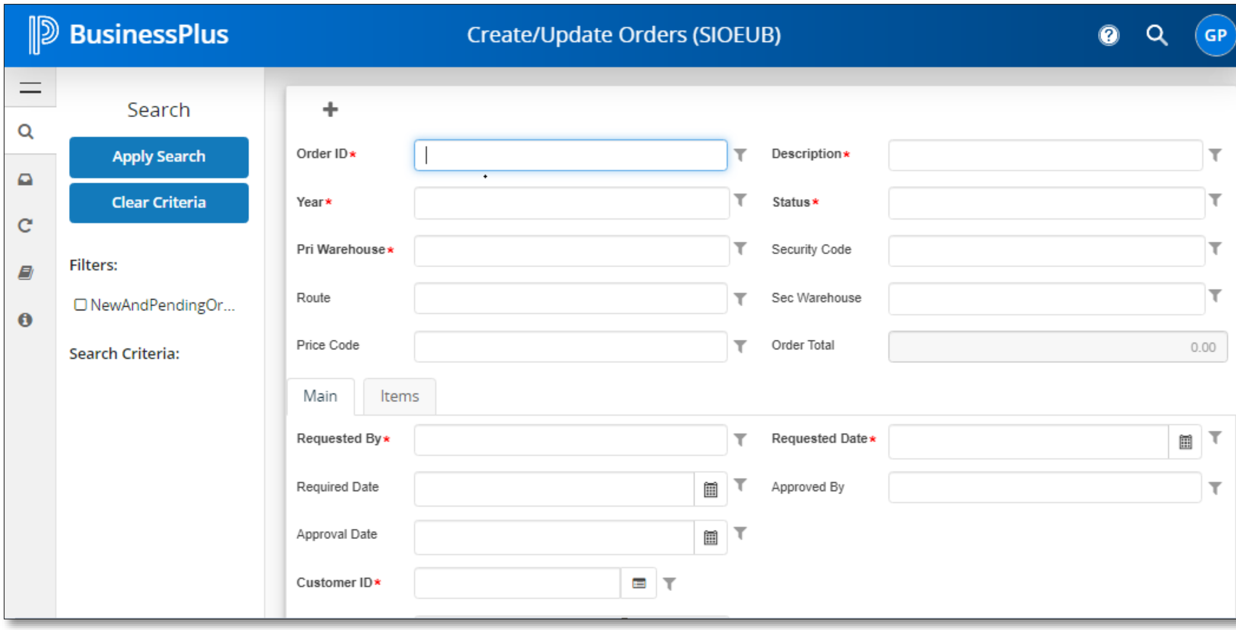
Select the Stores Inventory tab from the Personal Dashboard Page.



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

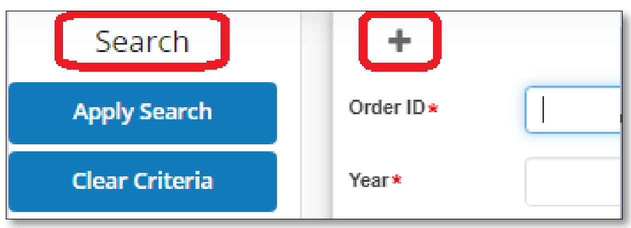


This will launch the module as shown below.

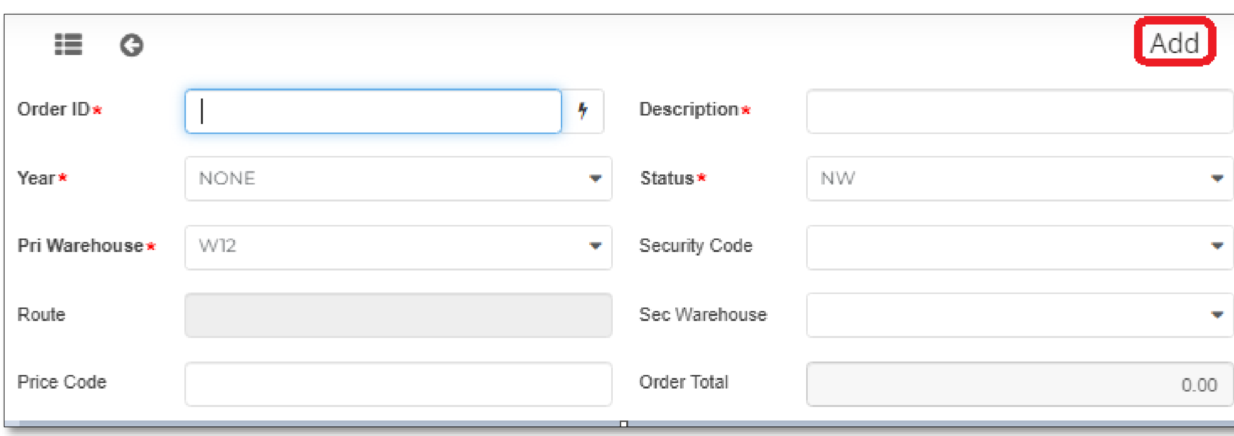


Step 2 – Creating a Stores Order

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



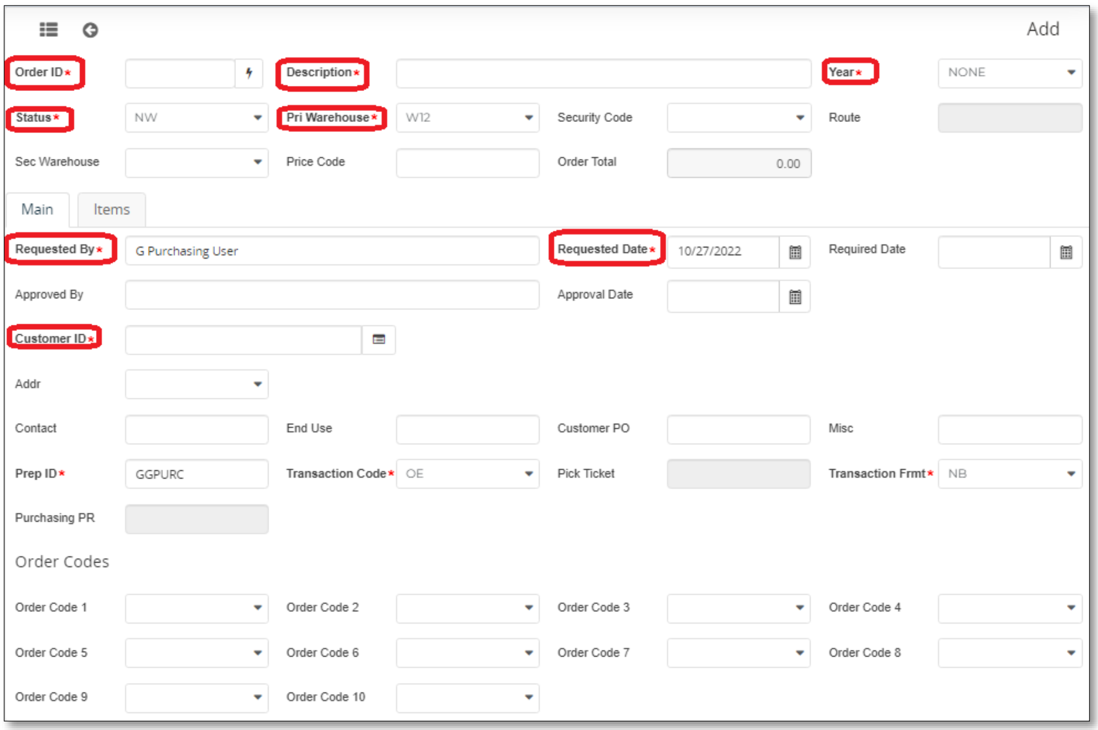
You will get an indicator that you are in "***Add***" mode by looking in the top right corner and seeing "***Add***."



Step 3 – Creating the Stores Order

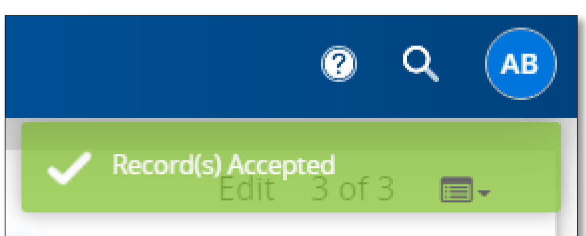
The required fields will be **bolded** followed by a red asterisk (*). There are fields that default in such as: Year, Status, Pri Warehouse, Requested By, and Requested Date. The required fields the user will need to fill in are as follows:

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. S***LL***00001 where ***LL*** is the ledger)



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.

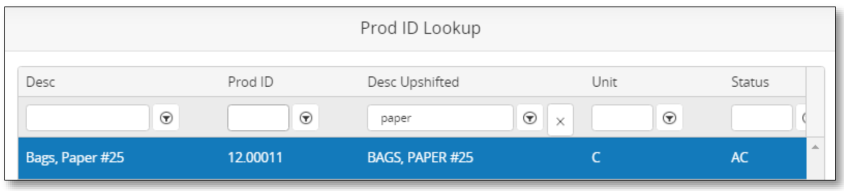


Note: The system will not auto-tab you into the "Items" tab, you will need to manually click on the "Items" tab to begin your entries.

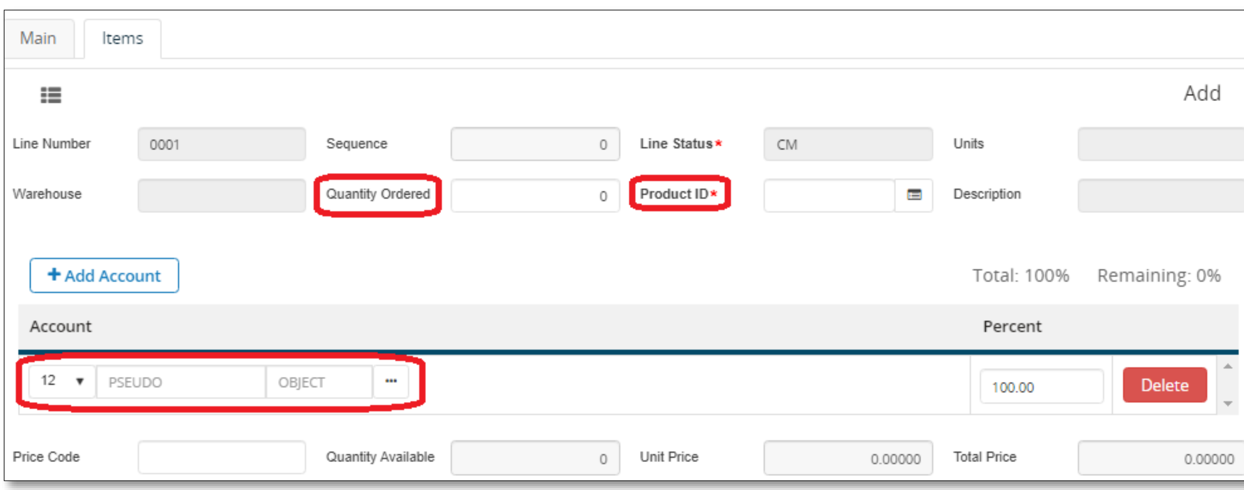
<u>Step 4 – Entering Items on Stores Order</u>

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

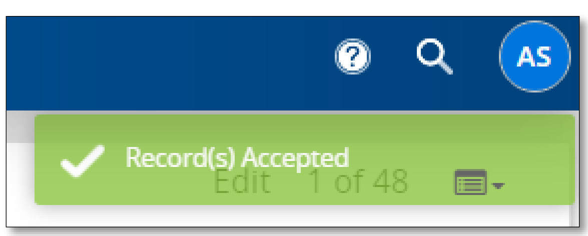
1. **Quantity Ordered:** Enter the quantity of the product being ordered.
2. **Product ID:** Enter the Product ID of item being ordered.
    a. To look up a Product ID, select the lookup icon () which will launch the lookup dialogue box that you can then double click or select and click ok to pull into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



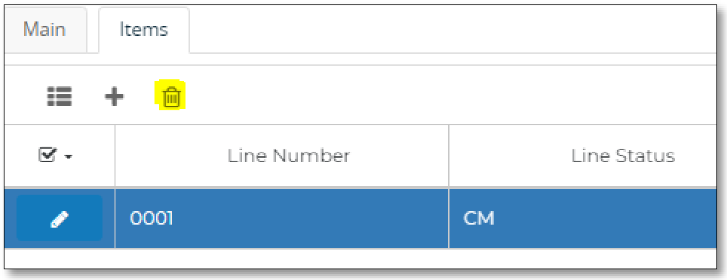
After the item information has been entered, press the **ENTER** key on your keyboard to save the record and receive the green "*Record Accepted*" message in the top right corner of the screen. User may continue to add items to the order or approve the order in workflow.

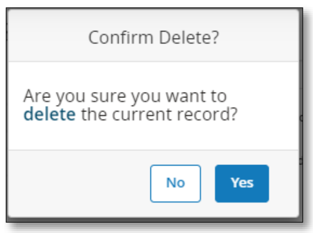


Deleting Items on Stores Order

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.

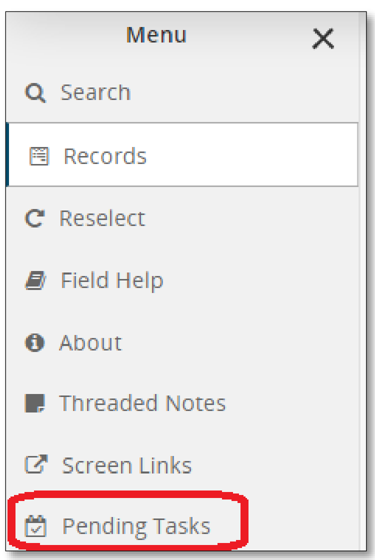
Note: This can only be processed prior to approving in Workflow. Once approved in Workflow, user can no longer delete an item on a Stores Order.





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.