UNIVERSITY STORES

ON-LINE ORDER ENTRY PROCEDES
Section 1: Accessing the University Stores Menu (USM)

From the IMS System Menu type **USM** for the University Stores Menu and press enter. (Figure 1-1)

The University Stores Main Menu will display. All the options within University Stores Menu will be displayed (Figure 1-2). Press F2 to go the Customer Menu as shown in Figure 1-2.

At this point the user may select to review the on-line catalog, place a stock or non-stock order or track an existing order.
Section 2: Using the University Stores On-Line Catalog (CAT).

After selecting the Customer Menu (PF2) as shown in Figure 1-2, the Customer Menu will appear:

Type "CAT" in the CODE field and hit ENTER.

If the Stock Number is known, type it as shown in Figure 2-2. If the stock number is a correct match with an item in inventory, Figure 2-3 shows how the information will be displayed. The information displayed includes Stock Number, Object Code, Unit Price, Availability, Unit of Measure and Number in Unit of Measure.

(Figure 1-2)

(Figure 2-1)

(Figure 2-2)
If the stock number is not known, you can simply type the first few letters of the item description in the "DESC:" field and hit enter. Figure 2-4 shows a catalog search for calculators. By typing "CALCUL," all items with these characters will appear.

Hint: You only need to type a few characters of the item description. The system will then search the database and provide a listing of all items that fit your request as shown above in Figure 2-4.
Section 3: Placing a Departmental Order (DCS)

This function can be used to place a new departmental order or change an existing one that has not been transmitted. To place a new order go to the Customer Menu (Figure 2-1) and type "DCS" at the command line and hit ENTER. The screen that appears is the order entry screen for new orders.

The following information is then typed into the specified fields (Figure 3-1):

**ACTION:** Type "A" to add an order and hit enter. (Hit enter a second time and red question markers will indicate the fields that are required).

**CODE:** "DCS" will already appear in this field.

**TYPE:** There are two order types. The first is "D" for delivery. If this option is selected, University Stores will deliver the order to your department. Select a "W" (Will Call) if you desire to pick up your order from University Stores.

**PROJECT:** This is an optional field. This is a numeric field used by departments to track project expenses.

**ACCOUNT NBR:** Enter your nine digit budget code or account number. Don’t enter dashes.

**AUTHORIZED BY:** Enter the name of the professor or supervisor approving the order.

**SHIP COMPLETE:** If the entire order needs to be shipped complete, then select "Y". University Stores will hold the order until ALL stock items are available and then ship the order in complete status. The default setting is "N", which means that the items that are in stock are shipped and the backorders will be released as they are received by University Stores.

**CONTACT NAME:** Name of the person placing the order.

**CONTACT PHONE:** Campus phone number of the person placing the order.
After the CONTACT PHONE number has been entered hit **ENTER** and the cursor will move to the STOCK NUMBER position. Enter the stock number and quantity desired. Use the **TAB** key to navigate through the fields. Repeat as many times as required. (Figure 3-2)

**NOTE:** If there are more than seven items, complete the first page and hit **ENTER**. A new set of order entry lines will appear and will be numbered sequentially. Continue to type in the stock number and quantities.

After all stock numbers and quantities have been entered, hit **ENTER**. At this time, any items with a backorder status will be highlighted in red. (Figure 3-3) Two options are available:

1. The cursor will be in the quantity field. This step is required if you **DO NOT** want to backorder any quantity. Change the quantity to reflect what is shown in the available column to the right. If the item has no stock available type "0" and hit **ENTER**. This will delete that line.

   -OR-

2. Using the **TAB** key, move the cursor to the **BO** column and type "Y" and hit **ENTER**. By selecting "Y" the available quantity will be shipped and the balance will be placed on backorder.

Figure 3-3 shows that the customer has ordered 500 of the Kim-Wipes and there are only 287 available. They have selected the option to receive what is in stock and backorder the balance.
Once the order is complete "ADD SUCCESSFUL" will appear in the upper left hand corner of the screen.

Making Changes to an Existing Departmental Order

If a change is required on an order that has not been transmitted, use the TAB key and move your cursor to the ACTION field. Type in "C" to change the order and hit ENTER twice. All information that can be changed will appear in Green. Using the TAB key, move the cursor to the field that a change is required. Make the changes and hit ENTER."CHANGE SUCCESSFUL" will appear in the upper left hand corner of the order entry screen.

Shipping Instructions

Once the order is complete but not transmitted, select F4 to go to the SHIP/COMMENT screen (Figure 3-4). Enter "C" to change the information displayed. To insure accurate and timely delivery of the order, enter the department name, building name and room number. Use the "COMMENT" area on this screen to communicate any special delivery requirements. After the delivery information and comments field is complete, hit ENTER and "CHANGE SUCCESSFUL" will appear in the upper left hand corner of the screen.
Transmitting the Order to University Stores

Select F9 to return to the main screen of the order. In order to electronically transmit the order to University Stores select F2. **If this is not done, the order will remain in "pending" status and can not be processed.** After selecting F2, Figure 3-5 will display information concerning the order.

![Figure 3-5](image)

Figure 3-5 shows what the screen will look like following successful transmission of the order. "ORDER TRANSMITTED END OF DATA" will appear in the upper left hand corner of the screen.

**NOTE:** Make sure that you write down your order number for future reference.
Section 4: Placing a Non-stock Order On Line

From the Customer menu, type "DNS" at the command line as shown below in Figure 4-1 and hit ENTER.

The order entry screen will appear (Figure 4-2).

The following information is then typed into the specified fields (Figure 4-2):

**ACTION:** Type "A" to add a non-stock order and hit ENTER. (Hit ENTER a second time and red question markers will indicate the fields that are required).

**CODE:** "DNS" will already appear in this field.

**TYPE:** There are two non-stock order types. The first is "D" for delivery. If this option is selected, University Stores will deliver the order to the department. Select a "W" (Will Call) if you want to pick up the order.
from University Stores. When it arrives the department will be contacted.

**If a quote only is required, leave this space blank.**

**PROJECT:**
This is an optional field. This is a numeric field used by departments to track project expenses.

**ACCOUNT NBR:**
Enter the nine digit budget code or account number. Don’t enter dashes.

**AUTHORIZED BY:**
Enter the name of the professor or supervisor approving the order.

**SHIP COMPLETE:**
If the entire order needs to be shipped complete, then select "Y". University Stores will hold the order until ALL requested items have arrived and then ship the order in complete status. The default setting is "N", which means that the items are shipped as received and any backorders will be released as they are received by University Stores. **If a quote only is requested, leave this space blank.**

**REQUEST TYPE:**
Enter "P" to authorize the purchase of the requested item or "Q" to obtain a quote prior to the purchase. If you want a quote, University Stores will fax it to you as long as you provide a fax number on the comment line. Otherwise, all quotes will be given over the telephone to the contact person noted on the order. **For quotes only, leave "TYPE" and "SHIP COMPLETE" blank.**

**CONTACT NAME:**
Name of the person placing the order.

**CONTACT PHONE:**
Phone number for the person placing the order.

After the CONTACT PHONE number is entered use the *TAB* key and go to the VENDOR STOCK NBR field.

**DO NOT LOAD ANY INFORMATION INTO THE "VENDOR" FIELD!** This field is used by University Stores. A vendor may be suggested by typing the name in the comment field.

**VENDOR STOCK NBR:** Enter the vendor stock number at this point

**MANUFACTURER:** Enter the manufacturer of the item in this space.

**QUANTITY:** Enter the quantity of the item requested.

**U/M:** Type the Unit of Measure for the item. See Appendix I for a complete listing of acceptable Units of Measure.

**DESC:** Enter a complete description of the item including, size, color and any information that would be needed to find and buy the product.

**COMMENT:** This is an optional field. For quotes that require a faxed response, enter the fax number here.

After the above information is provided, hit *ENTER*. You will now be prompted to enter Line 2 of the non-stock order. Repeat the above steps as needed for additional items.

Figure 4-3 shows an example of a non-stock order quote request. Note that the system has assigned an order number. Record this for future reference.
Changing a Quote to a Request to Purchase.

Once a quote has been received and the department wishes to place an order for the item, a new order must be keyed using the steps outlined in Section 4. Quotes cannot be converted to orders automatically. Go to the SHIP/COMMENT screen of the new order and reference the original quote number on the comment line.

Shipping Instructions for Non-Stock Orders

Once the non-stock order is complete, select F4 to go to the "SHIP/COMMENT" screen. Enter "C" to change the information displayed and hit ENTER. To insure accurate and timely delivery of the order, enter the department name, building name and room number. Use the COMMENT area on this screen to communicate any special delivery requirements. After the proper delivery information and comments field is complete, hit ENTER and "CHANGE SUCCESSFUL" will appear in the upper left hand corner of the screen. From the "SHIP/COMMENT" screen select F6 to return to the main screen of the order.

Transmitting a Non-Stock Order

To electronically transmit the order to University Stores select F2. If this is not done, the order will remain in "pending" status and cannot be processed.

(Figure 4-3)
Section 5: Customer Order Tracking

From the University Stores Menu (USM) select F2. Type CST at the CUSTOMER MENU and hit ENTER. This brings the Customer Order Tracking Screen up (Figure 5-1).

Tracking an Order by Order Number

The following information is needed to track an order by ORDER NUMBER. To do this, the order number must be known. Use your TAB key to navigate through the screen.

ACTION: The action is always "V" to view the order.
CODE: Should read "CST".
ACCOUNT: Leave blank.
ORDER NUMBER: Type the order number in this space.
TYPE: Leave blank.
ORDER STATUS: Leave blank.
BEGIN DATE: Leave blank.
END DATE: Leave blank.
EMPLOYEE CODE: Leave blank.

Hit ENTER and the summary order information will appear. TAB down the SEL field and type "S" to select and see detailed information about the order (Figure 5-2 and 5-3)
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APPENDIX II

Incomplete - Order will stay in *incomplete* status if the order is not transmitted or if the order is ship complete and all items are not available.

Picked - Order has been *picked* in the warehouse.

On-Delivery - Order is *on the delivery van* and will be delivered that day.

Delivered - Order has been *delivered* to department and signed for.

Complete - Order has been *billed* to department for the items received.