

Creating Sales Order In Netsuite

1 Go to Netsuite

2 Hover over "Customers"

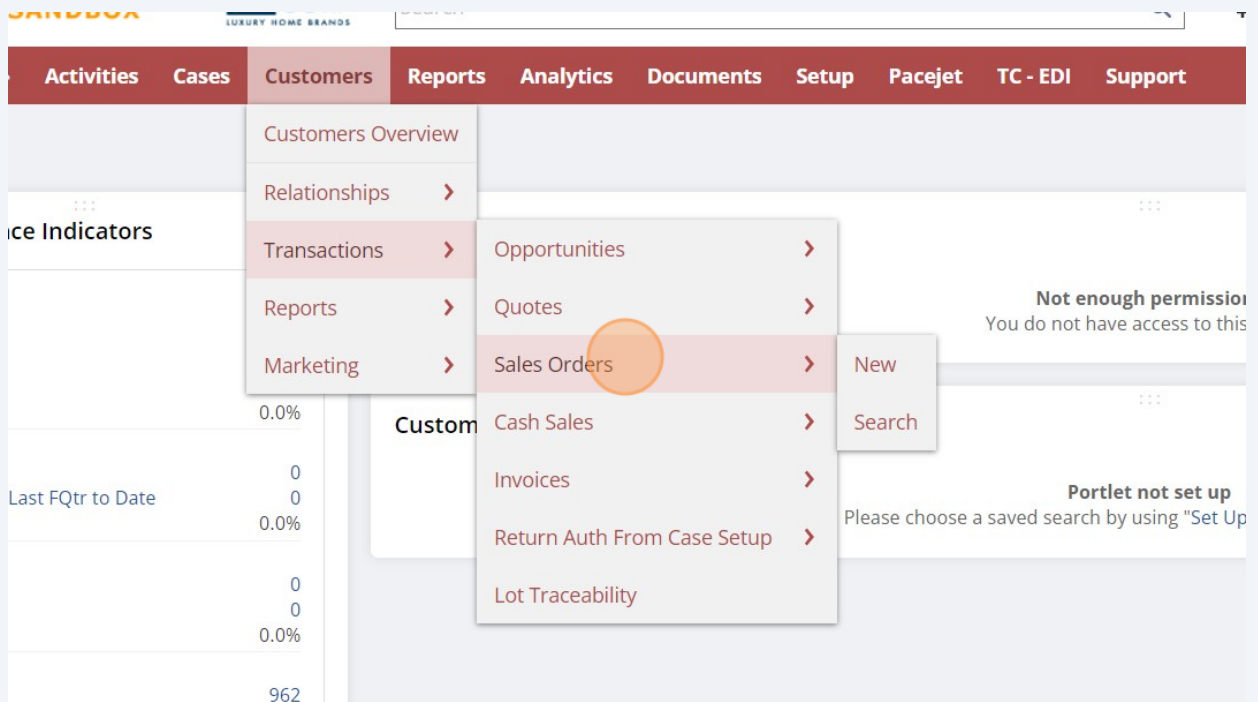
The screenshot displays the Oracle NetSuite interface. At the top, there are logos for ORACLE NetSuite, SANDBOX, and SWCORP LUXURY HOME BRANDS, along with a search bar. Below these is a navigation bar with several menu items: a home icon, a star icon, a house icon, Activities, Cases, Customers (highlighted with an orange circle), Reports, Analytics, Documents, Setup, Pacejet, and TC. Below the navigation bar, the page title is 'Inventory Item' with a magnifying glass icon. The item ID 'SD-FRLS05702BN' is displayed. Below the item ID are two buttons: 'Supply Chain Snapshot' and 'Print Label', followed by a plus icon and a dropdown menu labeled 'Actions'. Below this is a section titled 'Primary Information' which contains a table of item details.

INTERNAL ID	27905	UNITS TYPE	Each
ITEM NAME/NUMBER	SD-FRLS05702BN	PRIMARY STOCK UNIT	Eaches
UPC CODE	191042055032	PRIMARY PURCHASE UNIT	Eaches
DISPLAY NAME/CODE	Anzzi Frameless Shower Door w/ Sliding Brushed Nickel	PRIMARY SALE UNIT	Eaches
VENDOR NAME/CODE		BASE UNIT	EA
		SUBSIDIARY	Sea World Corporation

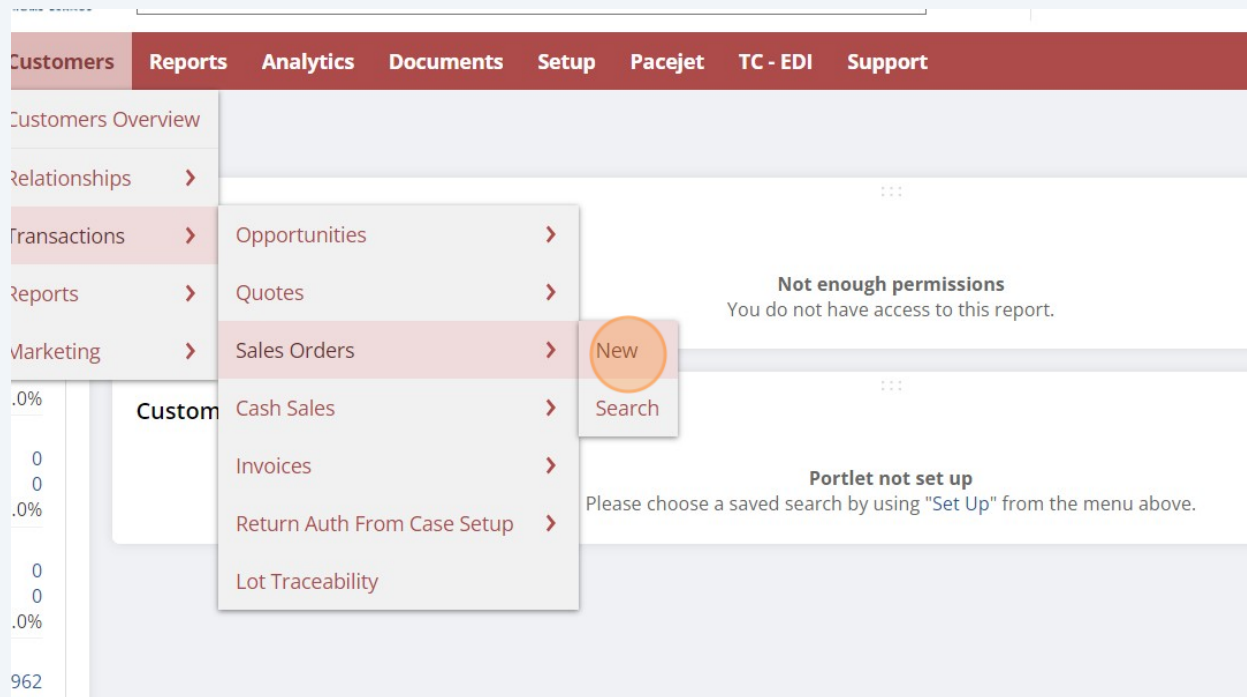
3 Hover over "Transactions"



4 Hover over "Sales Orders"



5 Click "New"



6 Select/enter the appropriate customer

The screenshot shows the 'Sales Order' form. At the top, there is a search icon and a 'Sales Order' title. Below the title are buttons for 'Save', 'Cancel', 'Auto Fill', and 'Actions'. The form is divided into two main sections: 'Primary Information' and 'Sales Information'. In the 'Primary Information' section, the 'CUSTOMER' field is highlighted with a blue border and an orange circle. The 'CUSTOMER' field is a dropdown menu with a search icon. Other fields in this section include 'CUSTOM FORM' (set to 'Spa World - Sales Order'), 'ORDER #' (set to 'To Be Generated'), 'PROJECT', 'DATE' (set to '2/23/2024'), 'STATUS' (set to 'Pending Approval'), 'PO #', 'MEMO', and 'ON HOLD'. In the 'Sales Information' section, there are fields for 'SALES REP', 'LEAD SOURCE', 'OPPORTUNITY', and 'SHIP-TO EMAIL ADDRESS'.

7 Go to PO # and enter/paste the PO

The screenshot shows a web application interface with a top navigation bar containing tabs: Activities, Cases, Customers, Reports, Analytics, Documents, Setup, Pacejet, TC - EDI, and Support. Below the navigation bar is a search bar with the text 'er' and a magnifying glass icon. To the right of the search bar are buttons for 'Auto Fill' and 'Actions'. The main form area contains several fields: a dropdown menu for 'er', a 'STATUS' dropdown menu set to 'Pending Approval', a 'PO #' text input field highlighted with an orange circle, a 'MEMO' text area, and a checkbox labeled 'ON HOLD'. At the bottom of the form, there is a 'LEAD SOURCE' dropdown menu and a 'REL' dropdown menu.

8 Scroll down to Item and enter the SKUs and amount/pricing

The screenshot shows a web application interface with a top navigation bar containing tabs: Items, Promotions, Shipping, Billing, Accounting, Relationships, Communication, Custom, NS WMS, and TC. Below the navigation bar is a 'DISCOUNT ITEM' dropdown menu and a 'RATE' text input field. There are buttons for 'Add Multiple', 'Intelligent Recommendations 0', 'Clear All Lines', and 'Configure'. Below these buttons is a table with columns: ITEM*, ITEM TYPE, DESCRIPTION, QUANTITY, UNITS, and AV. The 'ITEM*' column is highlighted with an orange circle. Below the table is a row of buttons: 'Add', 'Cancel', 'Copy Previous', 'Insert', 'Remove', 'Intelligent Recommendations', and 'Edit Config'. At the bottom of the form, there are buttons for 'Save', 'Cancel', 'Auto Fill', and 'Actions'.

9 Click "Shipping"

The screenshot shows a software interface with a top navigation bar containing tabs: Activities, Cases, Customers, Reports, Analytics, Documents, Setup, Pacejet, and TC. Below this, a form is displayed with various input fields. On the left side, there are fields for 'LAST MODIFIED DATE', 'REASON FOR RETURN' (a dropdown menu), 'RETURN LABEL REQUEST' (a dropdown menu), and 'B2C CHANNEL'. On the right side, there are checkboxes for 'COMMISSION PAID', 'AWAITING INVENTORY', and 'CALL CONFIRMED', along with a 'PO # 2' field and an 'APPROVAL DATE' field. A red circle highlights the 'Shipping' tab in the navigation bar. Below the navigation bar, there are two sub-sections: 'Shipping Information' and 'Shipping Address'. The 'Shipping Information' section contains fields for 'SHIP DATE' (with a calendar icon and the date '2/26/2024' entered), 'SHIPPING CARRIER' (a dropdown menu with 'More' selected), 'SHIPPING METHOD' (a dropdown menu), and a checked checkbox for 'SHIP COMPLETE'. The 'Shipping Address' section contains a 'SHIP TO SELECT' dropdown menu (with '- Custom -' selected) and a 'SHIP TO' field (a large greyed-out area). A 'Map' link is visible at the bottom right of the 'SHIP TO' field.

10 Click the "+" sign and enter customer information

The screenshot shows a software interface with a top navigation bar containing tabs: Shipping, Relationships, Communication, Custom, NS WMS, TC - EDI, PO Acknowledgement, Pacejet, Amazon, and S. Below this, a form is displayed. On the left side, there are fields for 'PO # 2', 'AWAITING INVENTORY', 'CALL CONFIRMED', and 'APPROVAL DATE'. On the right side, there are fields for 'SALES ORDER CLOSED REASON' and 'EXCLUDE FROM ELECTRONIC BANK PAYMENT'. A red circle highlights a '+' sign in the 'SHIP TO SELECT' dropdown menu. Below the 'SHIP TO SELECT' dropdown menu, there is a 'SHIP TO' field (a large greyed-out area). A 'Map' link is visible at the bottom right of the 'SHIP TO' field. Below the 'SHIP TO' field, there are checkboxes for 'NS WMS COD FLAG' and 'MCH ASN', and a 'MARKETPLACE SHIPPING' field. On the right side, there is a 'SO FORMULA SHIP DATE' field.

11 Click "Billing" if necessary (If not necessary go to step 13)

The screenshot shows a software interface with a top navigation bar containing tabs: Activities, Cases, Customers, Reports, Analytics, Documents, Setup, and Pagejet. Below this, there are several form fields including 'LAST MODIFIED DATE', 'REASON FOR RETURN', 'RETURN LABEL REQUEST', 'B2C CHANNEL', 'COMMISSION PAID', 'PO # 2', 'AWAITING INVENTORY', 'CALL CONFIRMED', and 'APPROVAL DATE'. A secondary navigation bar below the main form contains tabs: Items, Promotions, Shipping, Billing, Accounting, Relationships, Communication, Custom, NS WMS, and TC. The 'Billing' tab is highlighted with an orange circle. Below the navigation bar, there are two sections: 'Shipping Information' and 'Shipping Address'. The 'Shipping Information' section includes fields for 'SHIP DATE' (2/26/2024), 'SHIPPING CARRIER' (More), 'SHIPPING METHOD', and a checked 'SHIP COMPLETE' box. The 'Shipping Address' section includes 'SHIP TO SELECT' (- Custom -), 'SHIP TO' (a map area), and a 'Map' link.

12 Go to Payment and select the card type in Payment Method
Fill out credit card information and check the "Charge Card" box and click "Save"

The screenshot shows a software interface with a top navigation bar containing tabs: Payment_Events, Payment, and a third tab. Below this, there are several form fields including 'AMOUNT AFTER DISCOUNT', 'TAX AFTER DISCOUNT', 'TOTAL AFTER DISC', 'PAYMENT METHOD', 'CARD STREET', 'CARD ZIP CODE', 'PAYMENT PROCESSING PROFILE', 'CHARGE CARD', 'CREDIT CARD APPROVED', 'P/N REF.', and 'NAME ON CARD'. The 'Payment' tab is highlighted with an orange circle. The 'PAYMENT METHOD' dropdown menu is open, showing options: ACH, Amazon Pay, American Express, Cash, Check, and Discover. The 'CHARGE CARD' checkbox is checked.

Payment_Events **Payment •**

PAYMENT METHOD

VISA

CREDIT CARD SELECT

CREDIT CARD #

CSC

EXPIRES (MM/YYYY)

NAME ON CARD

CARD STREET

CARD ZIP CODE

PAYMENT PROCESSING PROFILE

☐ CHARGE CARD

☐ CREDIT CARD APPROVED

P/N REF.

Save



Cancel

Auto Fill

Actions



Payment_Events **Payment •**

PAYMENT METHOD

VISA

CREDIT CARD SELECT

CREDIT CARD #

CSC

EXPIRES (MM/YYYY)

NAME ON CARD

CARD STREET

CARD ZIP CODE

PAYMENT PROCESSING PROFILE

☐ CHARGE CARD

☐ CREDIT CARD APPROVED

P/N REF.

Save



Cancel

Auto Fill

Actions



Payment_Events **Payment •**

PAYMENT METHOD

VISA

CREDIT CARD SELECT

CREDIT CARD #

437234545115454545

CSC

EXPIRES (MM/YYYY)

NAME ON CARD

CARD STREET

CARD ZIP CODE

PAYMENT PROCESSING PROFILE

☐ CHARGE CARD

☐ CREDIT CARD APPROVED

P/N REF.

Save

Cancel

Auto Fill

Actions

Payment_Events **Payment •**

PAYMENT METHOD

VISA

CREDIT CARD SELECT

CREDIT CARD #

CSC

EXPIRES (MM/YYYY)

NAME ON CARD

CARD STREET

CARD ZIP CODE

PAYMENT PROCESSING PROFILE

☐ CHARGE CARD

☐ CREDIT CARD APPROVED

P/N REF.

Save

Cancel

Auto Fill

Actions

Payment_Events **Payment •**

PAYMENT METHOD

VISA

CREDIT CARD SELECT

CREDIT CARD #

CSC

EXPIRES (MM/YYYY)

NAME ON CARD

CARD STREET

CARD ZIP CODE

PAYMENT PROCESSING PROFILE

☐ CHARGE CARD

☐ CREDIT CARD APPROVED

P/N REF.

Save



Cancel

Auto Fill

Actions

Payment_Events **Payment •**

PAYMENT METHOD

VISA

CREDIT CARD SELECT

CREDIT CARD #

CSC

EXPIRES (MM/YYYY)

NAME ON CARD

CARD STREET

CARD ZIP CODE

PAYMENT PROCESSING PROFILE

☐ CHARGE CARD

☐ CREDIT CARD APPROVED

P/N REF.

Save



Cancel

Auto Fill

Actions

JNT

TOTAL AFTER DISCOUNT

Payment •

CARD STREET

CARD ZIP CODE

PAYMENT PROCESSING PROFILE

☐ CHARGE CARD

☐ CREDIT CARD APPROVED

P/N REF.

AUTH

AVS S

AVS Z

CSC M

☐ R

DISCOUNT

TOTAL AFTER DISCOUNT

UNT

its Payment •

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LECT

YY)

CARD STREET

CARD ZIP CODE

PAYMENT PROCESSING PROFILE

☐ CHARGE CARD

☐ CREDIT CARD APPROVED

P/N REF.

DISCOUNT

TOTAL AFTER DISCOUNT

UNT

its **Payment •**

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CARD STREET

LECT

CARD ZIP CODE

PAYMENT PROCESSING PROFILE

☐ CHARGE CARD

☐ CREDIT CARD APPROVED

YY)

P/N REF.

R DISCOUNT

TOTAL AFTER DISCOUNT

COUNT

ents **Payment •**

THOD

CARD STREET

SELECT

CARD ZIP CODE

#

PAYMENT PROCESSING PROFILE

☐ CHARGE CARD

☐ CREDIT CARD APPROVED

YYYY)

P/N REF.

RD

Payment •

METHOD
▼

CARD SELECT
▼

CARD #

(MM/YYYY)

CARD

CARD STREET

CARD ZIP CODE

PAYMENT PROCESSING PROFILE
▼

☒ CHARGE CARD
☐ CREDIT CARD APPROVED

P/N REF.

Cancel

Auto Fill

Actions ▼

Payment •

PAYMENT METHOD
VISA
▼

CREDIT CARD SELECT
▼

CREDIT CARD #

CSC

EXPIRES (MM/YYYY)

NAME ON CARD

CARD STREET

CARD ZIP CODE

PAYMENT PROCESSING PROFILE
▼

☒ CHARGE CARD
☐ CREDIT CARD APPROVED

P/N REF.

Save ▼

Cancel

Auto Fill

Actions ▼

13 Click "Save"

SHIPPING METHOD

☒ SHIP COMPLETE

NS WMS FREIGHT TERMS

☐ NS WMS SIGNATURE REQUIRED

NS WMS THIRDPARTY ACCOUNTNUMBER

☐ NS WMS SATURDAY DELIVERY

☐ NS WMS COD FLAG

MARKETPLACE SHIPPING

☐ MCH ASN

Map

EDI Outbound Stage

Clear All Lines

✓ Add

✕ Cancel

+ Insert

Remove

Save

Cancel

Auto Fill

Actions