



User Manual

NSD ERP SYSTEM

Customers Relationship Management (CRM)

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Table of Contents

Introduction	5
MANAGER'S DESKTOP	5
CUSTOMER RELATIONSHIP MANAGEMENT	9
A - Customer Hierarchy	9
Creating a Customer	9
Deleting a Customer from the Hierarchy	9
CUSTOMER MASTER DATA	10
A – Customer Action	10
Add a Customer	10
Block Customer Account	12
B – Maintain Customer Data	12
C – Customer File	14
UTILITIES	15
A – Customer Creation	15
B – Change Customer Status	15
C – Customer Management	16
Creating s Search criteria:	17
Updating (changing) a Search Criteria:	17
Deleting Search Criteria:	17
Maintaining Customer Data:	18
Displaying Customer Data:	18
Creating a Template for Quotation	18
A- Creating the Template variant	18
B - Creating the Template	20
C - Creating a report header with a LOGO	22
EMPLOYEES	24
Hire New Employee	24
Organization Assignment	25
Maintain Employee Data	26
Display Employee Data	27
Employee Management	27
Employee Reports	28
A - Employee List	28
B – Employee Comments	29

PRODUCTS MANAGEMENT	31
A – Products Hierarchy.....	31
Create Products Hierarchy	31
Maintain Products Hierarchy	31
Display Products Hierarchy	33
Delete Products Hierarchy	33
B - Products Master Data.....	34
Product Action	34
Maintain Product Data	36
Display Product Data	37
Product File.....	37
Product Management	38
C - UTILITIES.....	39
Quick Material Creation	39
Material Status Management	40
Material Status Changing History.....	40
D – REPORTS	41
List of Materials.....	41
VENDORS MANAGEMENT	42
A – VENDORS HIERARCHIES	42
Create Vendors Hierarchies	42
Maintain Vendors Hierarchies	42
Display Vendors Hierarchies	44
Delete Vendors Hierarchies	44
B - VENDORS MASTER DATA	44
Vendor Action.....	44
❖ Add a Vendor.....	45
❖ Block Vendor Data	46
❖ Hold Vendor Data.....	47
Maintain Vendors Data.....	47
Display Vendor Data.....	49
Vendors Management	50
❖ Creating Search criteria:	51
❖ Updating (changing) a Search Criteria:	51
❖ Deleting Search Criteria:	51
❖ Maintaining Vendor Data:	52
❖ Displaying Vendor Data:	52
C – UTILITIES	52
Quick Creation.....	52
Vendor Status Management.....	53
Status History	54
D – REPORTS	55
List of Vendors	55
Vendors Structure	56

Vendors Comments Evaluation	56
Vendors Communication	56
E – PURCHASE ORDER.....	57
Create Purchase Order	57
Maintain Purchase Order	58
Display Purchase Order	59
SALES DOCUMENTS	60
A – SALES QUOTATIONS.....	60
Create Sales Quotation.....	60
Maintain Quotation Data.....	62
Display Sales Quotation.....	63
Reject Sales Quotation.....	64
Sales Quotation Management	65
B – SALES ORDERS	67
Create Sales Order Manually	67
Create Sales Order with Reference	68
Maintain Sales Order	69
Display Sales order	70
Sales Order Management.....	70
C – SHIPPING and TRANSPORTATION	71
Create Delivery Document	71
Maintain Delivery Document	74
Display Delivery Document	75
Delivery List – by Material.....	75
Delivery List – by Order	77
Delivery Document Posting.....	77
D - BILLING	79
Create Billing Document	79
Maintain Billing Document	80
Display Billing Document	82
Post Billing Document.....	82

INTRODUCTION

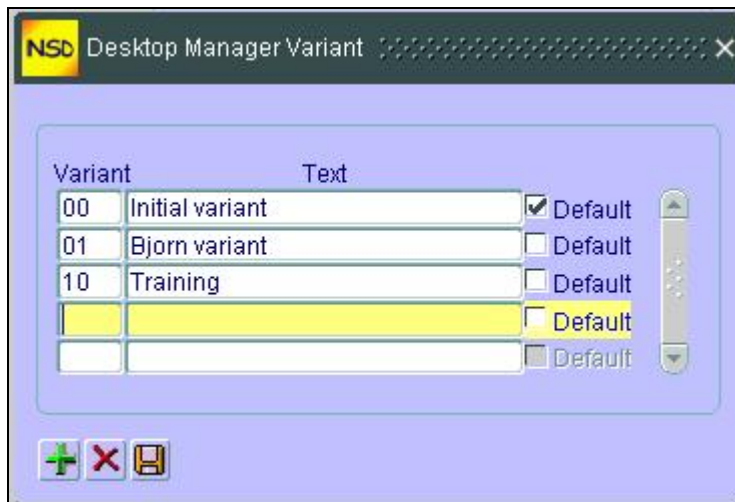
Beyond its rich integrated applications and customizing functionalities include in its ERP (NSD ERP System), NSD offers to its customers the new application Customer Relationship Management (CRM).


The present document deals and gives you an overview about the NSD ERP SYSTEM – Customer Relationship Management (CRM).

MANAGER'S DESKTOP


It is possible for the User to customize his/her desktop according to his/her needs for every day system usage. To do this, follow the simple steps:


1. From the Main screen, click on the icon 
2. Create a variant (every variant calls a desktop layout) by clicking on the icon 
3. On the Popup screen “desktop Manager Variant”, enter a variant number and description




4. Save your variant by clicking on icon 
5. Click on the X on top right of the Variant screen to exit

Now that we have created a variant for the desktop, let's populate it with some short cut button to the system.

1. Begin by first choosing the variant through the drop down and then clicking on execute icon 
2. You should have a clean Panel (just the different system icons)

3. Click on  to display the main tree on the Left panel
4. From the Main Tree on the left panel, choose the desired step that you want to put as a short cut on your desktop and right-click on it and choose "Add Icon"

Remark:

If the icon(s) don't appear on the Right panel, click on 

5. Repeat step 4 for additional buttons.

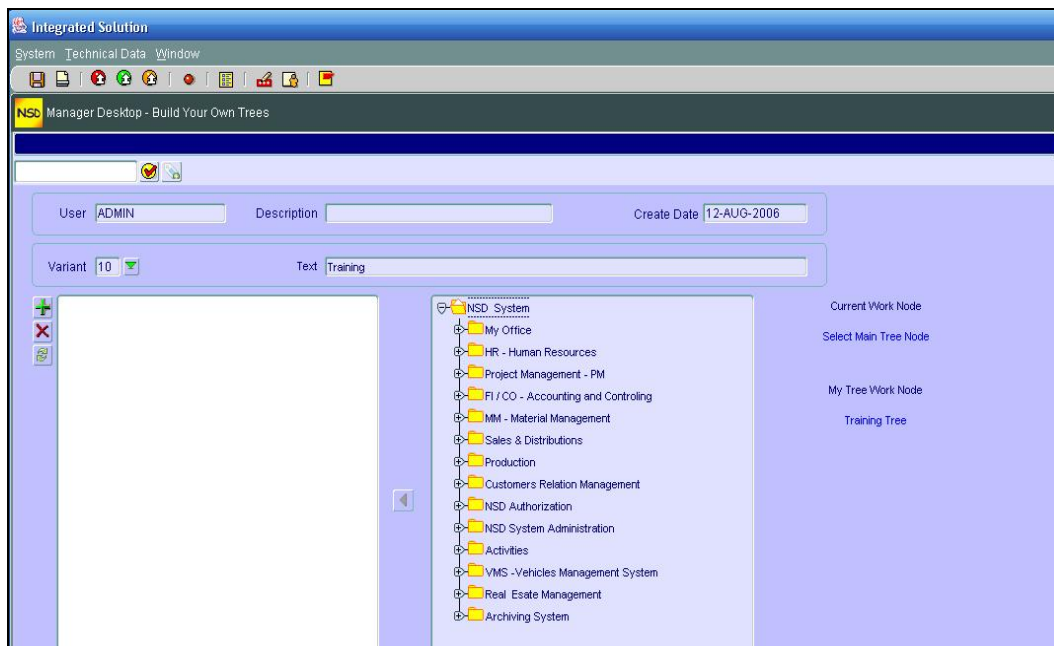
Note:

You can arrange the icons on your Desktop by:


1. Point to the Icon and click the Left mouse button
2. While still holding down the Left mouse button, move the mouse pointer to the desired place where you want the icon to be.
3. Release the mouse button

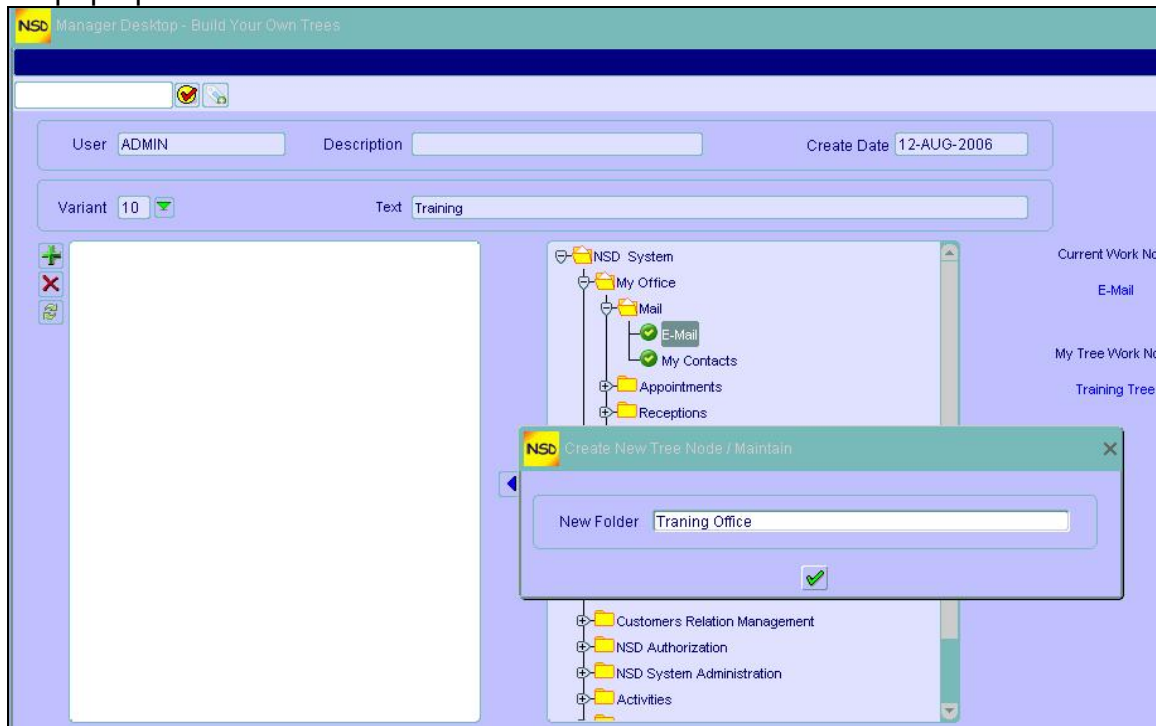
If you want to create your own tree (Left panel) where you will have only the functionalities needed, you proceed as follows:


1. Click on . You get

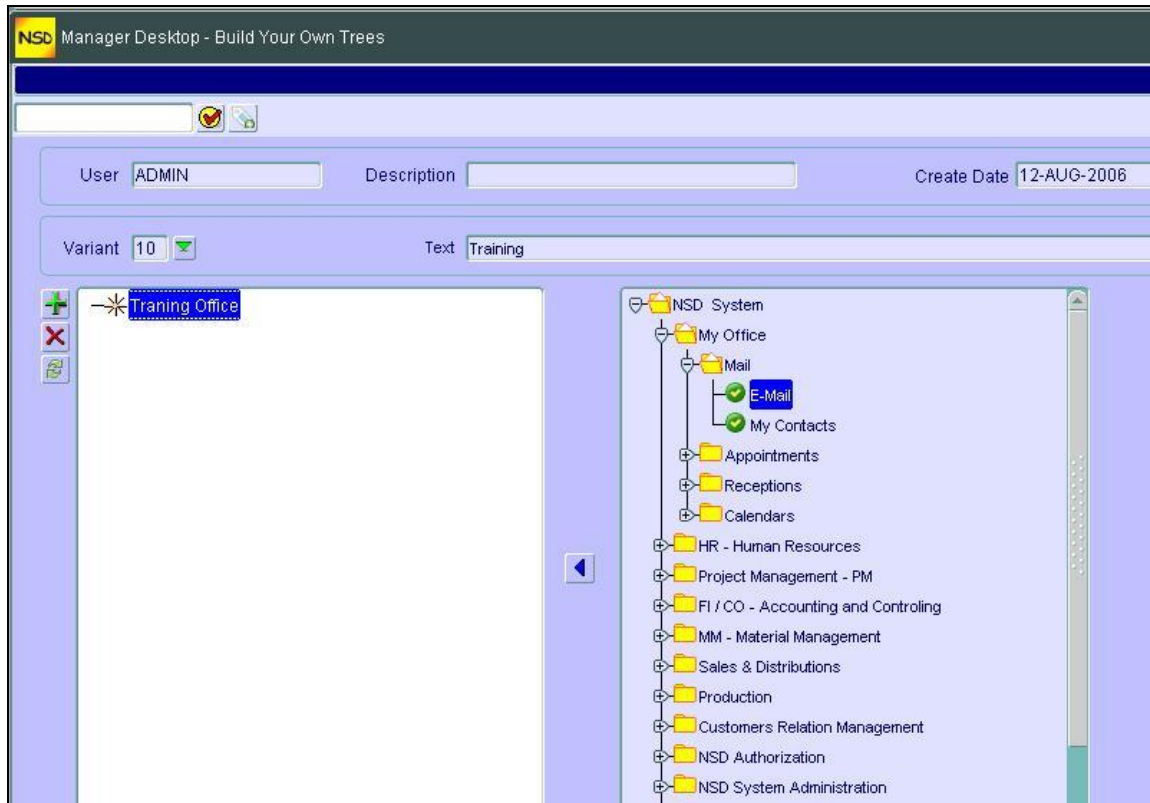


2. Choose your variant


3. Next, you create a node name by clicking on  and then filling in the description on the pop up window “Create New Tree Node/Maintain” and then click .



4. Highlight the Node under which you want to transpose from right panel to left panel as shown
5. Choose the step you want in your Tree and click .





6. Repeat step 5 to populate your node
7. If needed, create other nodes by repeating steps 3 to 5

Remark: You can create sub-nodes by clicking on the root node then 

8. Save your work by clicking on 
9. Get back to the previous screen (Desktop Manager) by clicking on 

Note:

You can toggle between the Main screen and the Manager desktop by clicking on  (Main screen) or  (Desktop Manager)

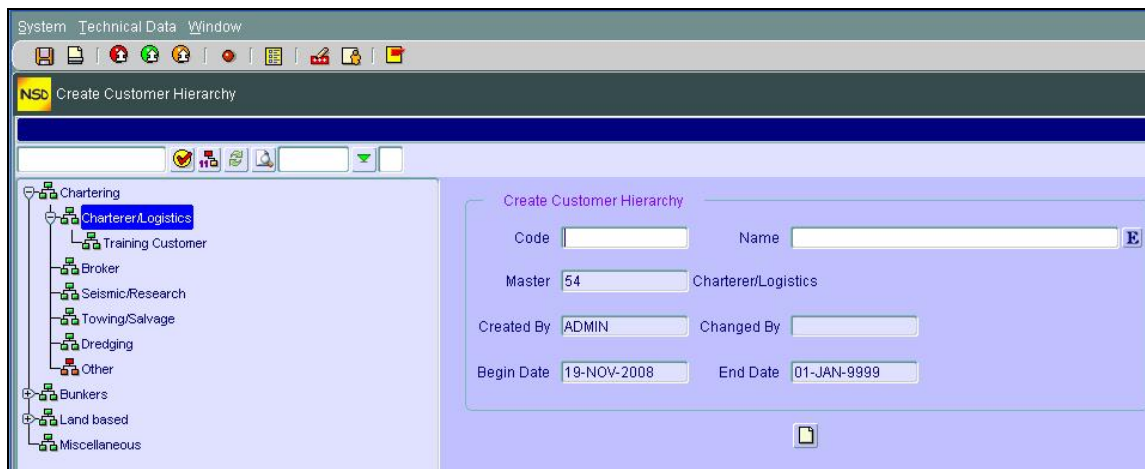
CUSTOMER RELATIONSHIP MANAGEMENT




A - Customer Hierarchy

Creating a Customer

Customer hierarchy consists of a graphical tree display of customers. You can create your customers graphically in this step and later on manage their data. This is how we can add (create) a customer to the hierarchy.



1. From the Main Menu and in the “Customer Hierarchy”, **double click** on “Create Customers Hierarchy”
2. On the “Create Customer Hierarchy” screen, **highlight** the Customer group (left Pan Tree) where you want your customer to belong to (in our example it will be under “Charter/Logistics” of “Chartering” group).



3. Enter the Code and Customer Name
4. Click on “create” icon 
5. Save by clicking on 
6. Repeat steps 2 to 5 for other customers
7. Exit the Create screen by clicking on 

Deleting a Customer from the Hierarchy

Deleting a Customer from the Hierarchy DOES NOT delete the customer from the database. It only deletes it from the graphical display. To do so, proceed as follows:

1. From the Main Menu and in the “Customer Hierarchy”, double-click on “**Delete Customers Hierarchy**”
2. Choose (click on) the customer you want to delete from the left pan tree
3. The fields on the right pan “Delete Customer Hierarchy” should be **filled up**
4. Click on 
5. Exit from the delete screen by clicking 

Remark:

At any time if you want to display the customers along with their codes, click on 

CUSTOMER MASTER DATA

Customer master data constitutes the heart of the CRM. It is all about the information which will be shared by the different functions in the system.

The 4 functions in the Master data are:

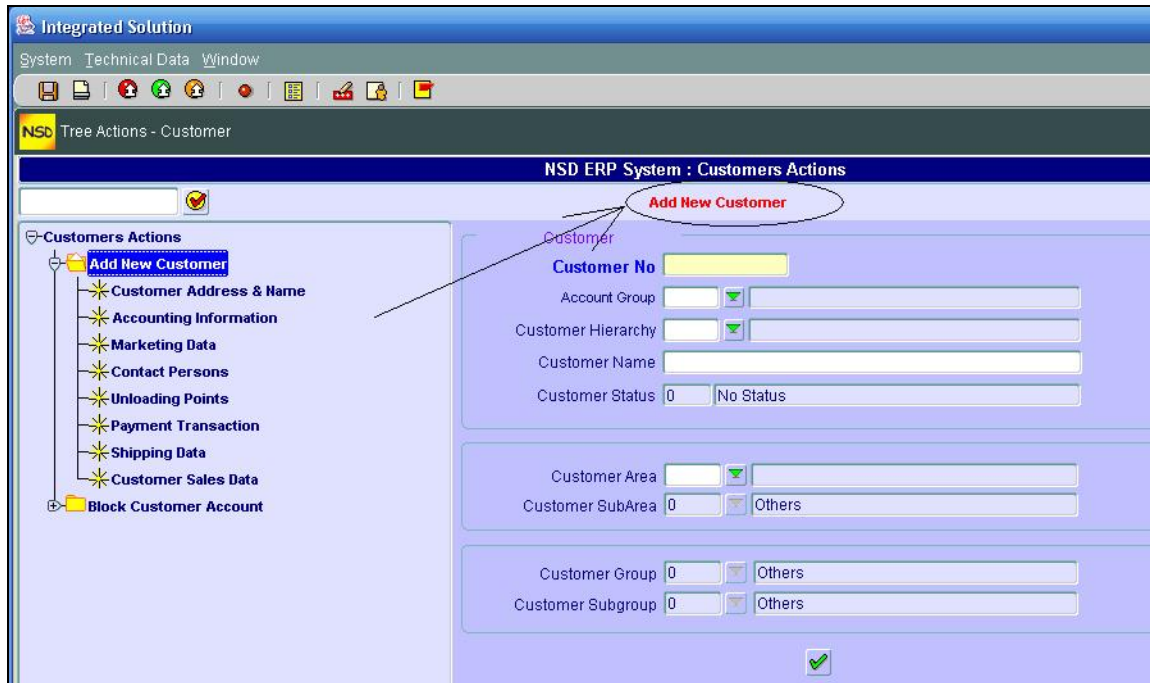
- Customer Actions: to be used when creating a NEW customer
- Maintain Customer Data: to be used to change the data about an EXISTING customer
- Display Customer Data: as the name implies it, this is to be used just for viewing customer data (you cannot change any information in this functionality). This mode will show all the infotypes (screens) containing data that are either complete or not complete.
- Customers Files: this is less enriching but **faster** than “Display Customer Data”


A – Customer Action



To ADD or BLOCK a customer, we perform an Action.
From the Main Menu:




Add a Customer


1. From the CRM → Customer Management → Customers Master Data
2. Double Click on “Customers Actions
3. To ADD a customer, double-click on “Add new Customer”. You should see the Title (Add New Customer) above the customer fields





4. Start by filling in the Account Group and down the other fields. **Don't try** to input the "Customer No"; it will be filled in by the system.
5. Once you enter all fields, click on execute 
6. You will be taken to another screen (Customer Address). Fill in the information needed


Note: If you want more Communication details click on  and add the ones you want (after each line, click on  to add another line).






7. Save by clicking on 
8. Click on  to get on the following screen (Customer Accounting Information)
9. Fill in the details and click on  to save your screen info

Note: If you want to see the Payment condition details, click on 

10. Click on  to get to the next screen (Customer Marketing Data)
11. Fill in the information needed and click on  to get to the next screen.

Remark: You can skip a screen at any time if, for example, you don't have the information available. You will have the opportunity to do it later if you want.

12. Save your work by clicking on 

13. Click on  to get to the next screen (Customer Contact Employees)
14. To be able to **add** a contact, You have to click on create icon  and then fill in the information. You can also add a contact **picture** by clicking on  To **correct** an entry, choose the contact and then click on  To display a contact detail, click on 
15. And so on for the rest of the screens.

Note: The User should be aware that the screens contained in the Action are configurable ie, it's the client who sets out what screens should be included in the action.

Block Customer Account

The same principle as for Customer Actions, this action will bring successively some predefined screens to block a customer.



It starts by double clicking on the Action name ie, "Block Customer Account" which brings the main screen where you will **input** the customer number "**Customer No**" and then fill in the rest of the required fields.

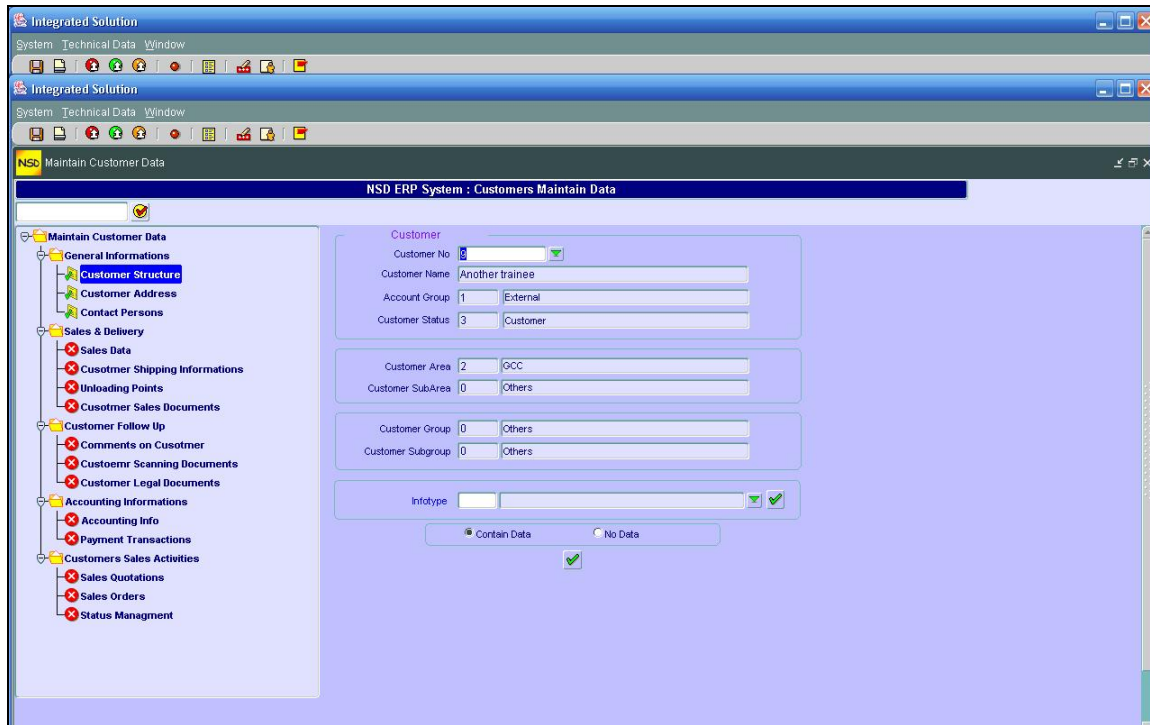
Notice this time: you input the customer No and NOT the system which is quite obvious.

B – Maintain Customer Data

This functionality gives you the opportunity to add, change or delete any data related to a Customer. This is where you can take over the screens you "missed" (didn't complete) in "Customer Actions" above.

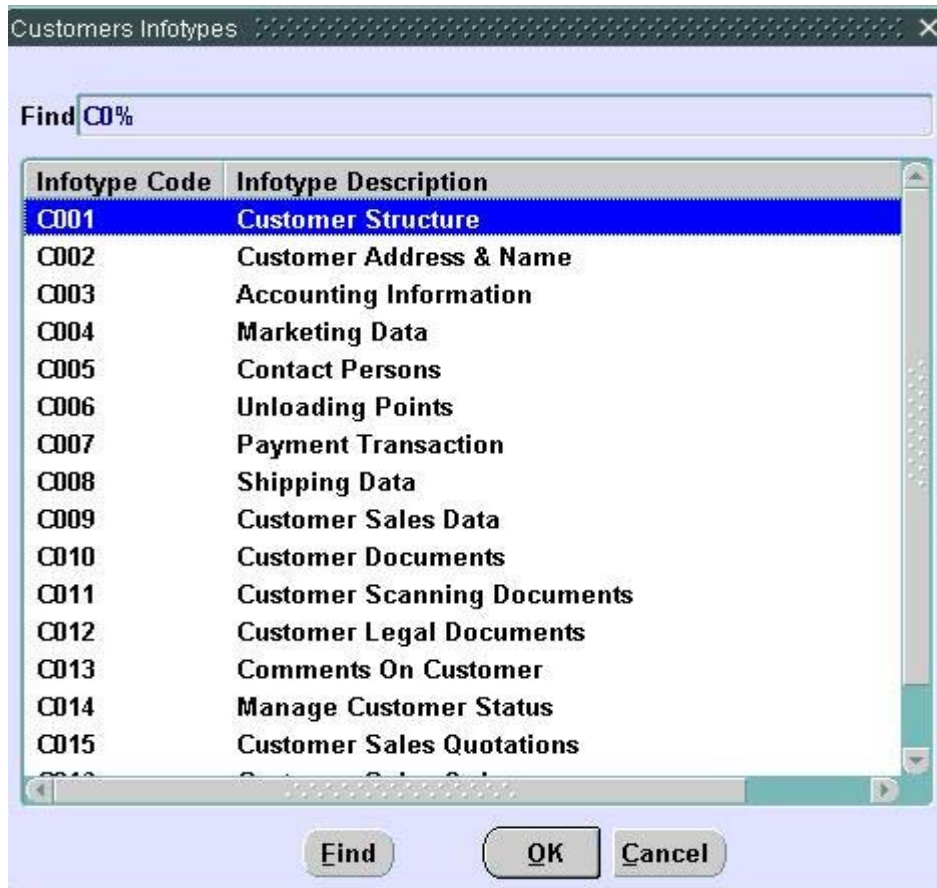
The tree for maintaining customer data is also configurable.

The good thing about this functionality among others is that, once you enter the customer number, the system will inform you immediately about the infotypes (screens) already maintained (icon ) or not (icon ) in front of the corresponding infotype.



Another facility is the fact that you can choose the infotype directly from the drop down window by clicking the arrow in front of the field “Infotype”. This is useful in case an infotype has been “omitted” in the tree for the “Maintain Customer Data”.

Once you click on the Infotype drop down arrow, you will get the following window from which you can choose the infotype.




C – Customer File


This functionality will let you display (search for) customer information. Notice the difference between this functionality and the “Display Customer Data” is the fact that ONLY the infotypes maintained for a given customer will be displayed (available) on the tree in the left pan.

To display a Customer file,

1. Double click on “Customer File”
2. Using the Drop down menu for “Customer No”, choose the customer Number

Note: The “Search Customer” window will let you search using three facilities:

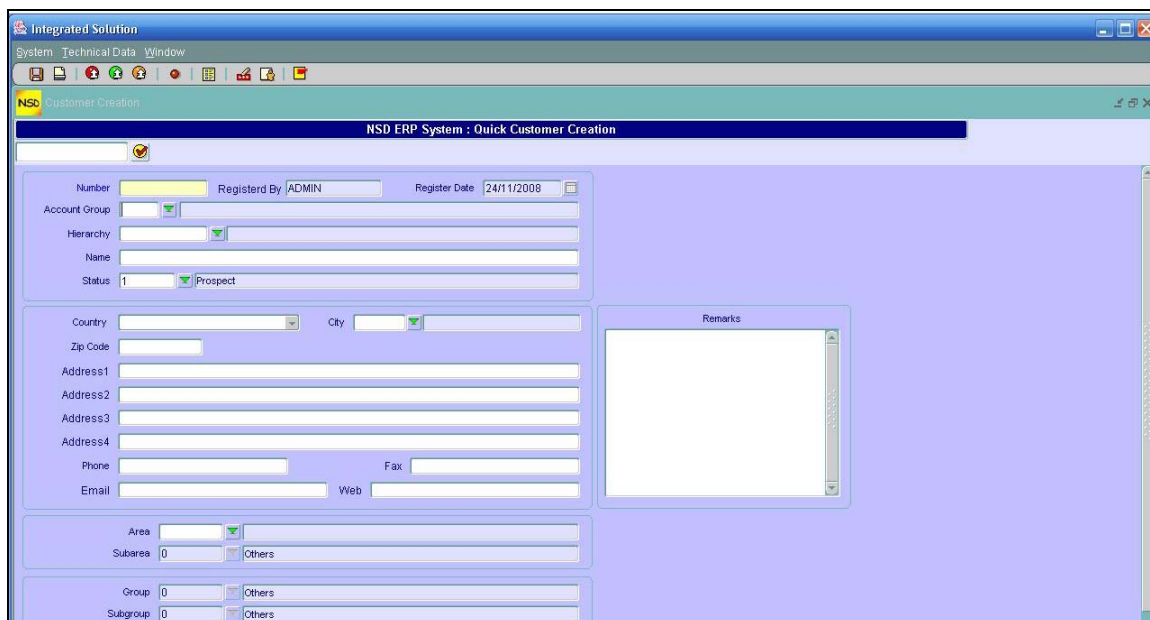
- Search customer using a General structure (you can hit the Execute button  without entering any data in the fields to display ALL customers.
- Search customer using the “Structure” or
- Search customer using the communication data (telephone, Fax , Web or email.

3. Once you have chosen the customer, double click on the desired infotype (on the left tree) and you will get the display information
4. Click on  to get back to the Customer file and you can repeat step 3 for other infotypes.

UTILITIES

A – Customer Creation

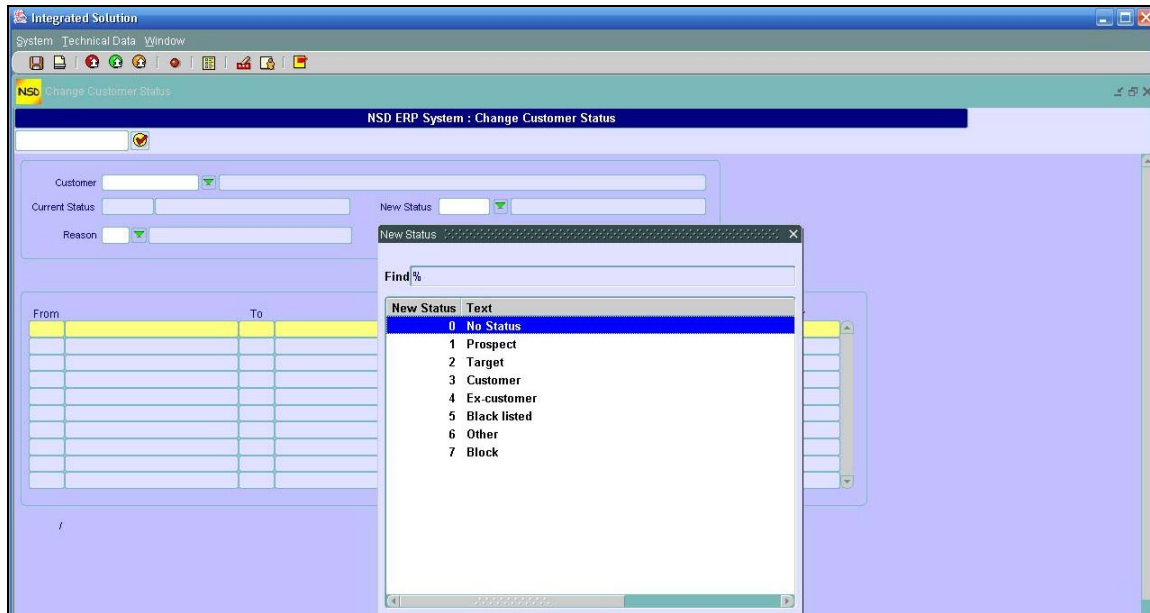
This functionality is called “Quick Customer Creation”. It is different from the “Customer Actions” in that no other screens will follow this one. The Quick Customer creation summarizes the most important fields (information) that are needed to create a customer. You can later go to the “Maintain customer data” to add other data about the customer. Here again, you don’t enter the customer number but leave it rather to the system to assign it.



B – Change Customer Status

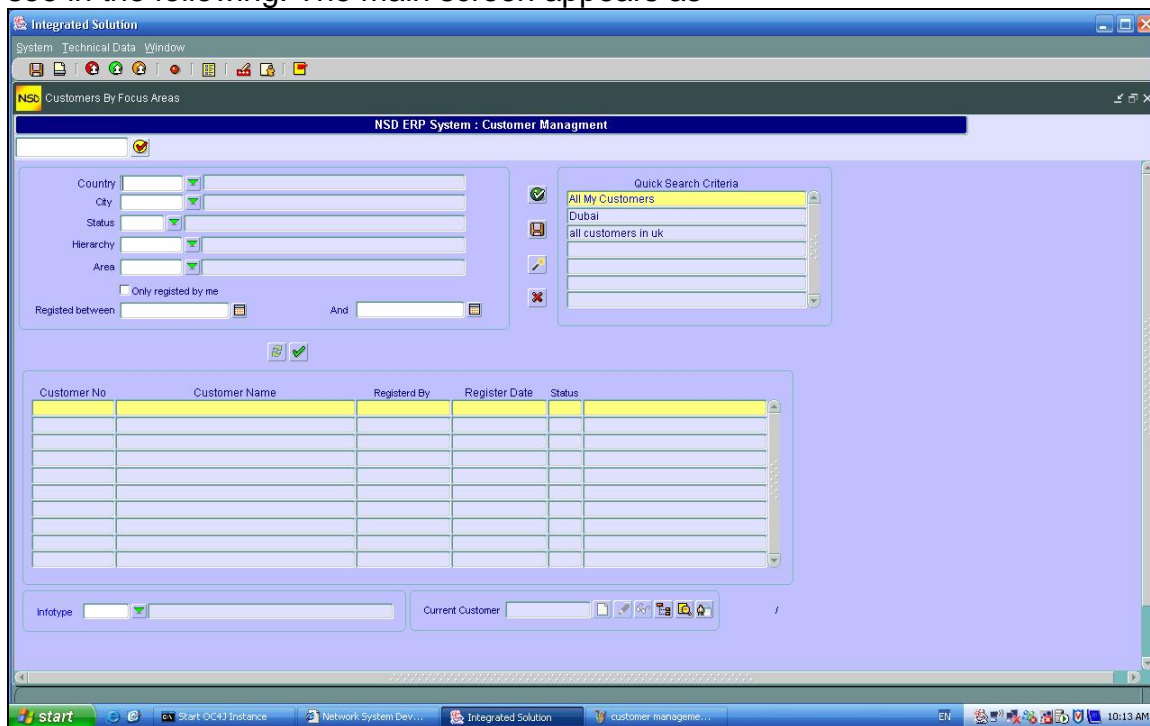
When a customer is created the system will assign him automatically the status 3 (Customer) ie, active. If you want to change his status (for example Block him, or black-list him etc...), it is with this functionality that you can do it.

For any change in status there is a reason and the system will keep a history of the customer status changes along with the reason.



C – Customer Management




This functionality represents the cockpit of the Customer management. From this you can access any data about the customer or make search besides other functionalities that we will see in the following. The main screen appears as



Creating s Search criteria:





You can create one or many search criteria and save them for later use. You can for example create one search criteria for ALL your customers, another search for all customers in GCC and another one for all BLOCKED customers etc...

This is how you do it:

1. First enter the search criteria by choosing and filling the fields needed. Examples:
 - To search for all **blocked** customers, fill in ONLY the status field by choosing through the drop down menu “Block” and leave all other fields blank.
 - To search for all customers in GCC countries, fill in only the “Area” field and leave the rest blank.
2. Once you search criteria are filled in, click execute . You will have a list of customers.
3. To SAVE this search criteria, click . A pop up window appears to ask you about the name you want to give to the search.
4. Type the name (description) of the search criteria and hit 


Updating (changing) a Search Criteria:

You can change an ALREADY SAVED search criteria by:

1. Click on 
2. A pop up window appears. Click on the green arrow to select the Search Criteria from the drop down menu
3. Click 
4. Fill in the desired search fields and click 
5. Once satisfied with the search criteria, click on  to update your Search Criteria




Deleting Search Criteria:

You can delete already saved Search Criteria from the list by:

1. Clicking on the name of the Search Criteria you want to delete
2. Click on 




Maintaining Customer Data:

You can **maintain Customer data directly** right from this screen as follows:

1. Click on your customer in the customers list (choose the customer)
2. Here you have the option either:
 - Maintain data through the infotypes (screens) by choosing them through the drop down infotypes menu and then performing the change (click on ) or create  or
 - Click on  which will take you to “Maintain Customer Data” tree screen

Displaying Customer Data:

You can **display Customer data directly** right from this screen as follows:

1. Click on your customer in the customers list (choose the customer)
2. Here you have the option either:
 - Display data through the infotypes (screens) by choosing them through the drop down infotypes menu and then clicking on  or
 - Click on either  which will take you to “Display Customer Data” tree screen or  which will take you to “Display Customer File” screen

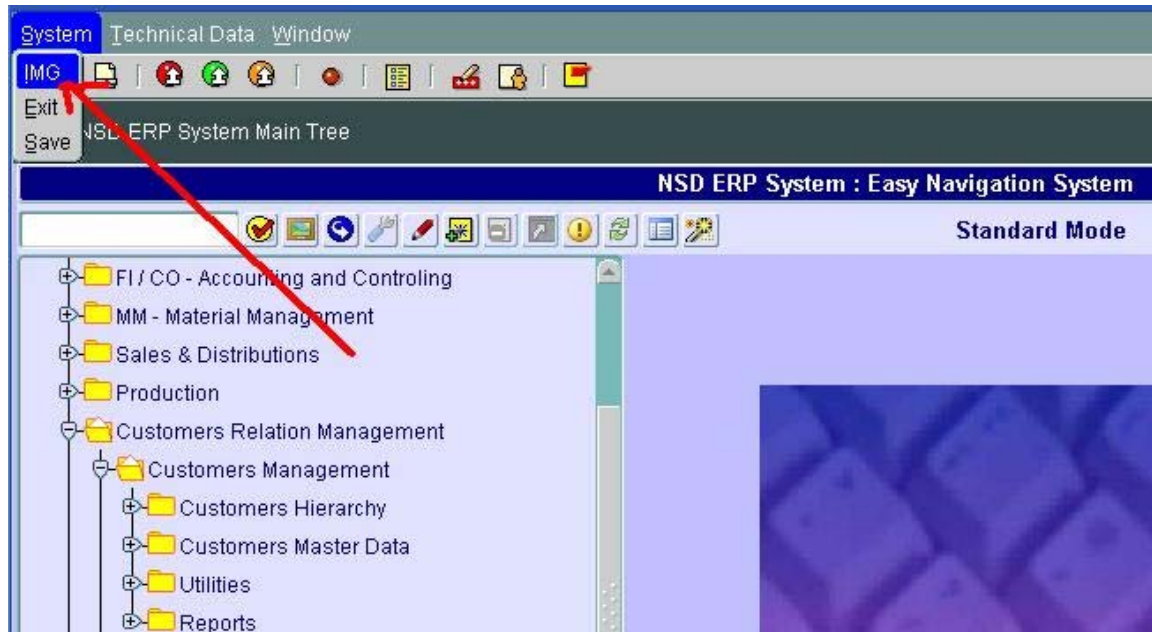
Creating a Template for Quotation

Creating a template for quotation is a 2 steps procedure:

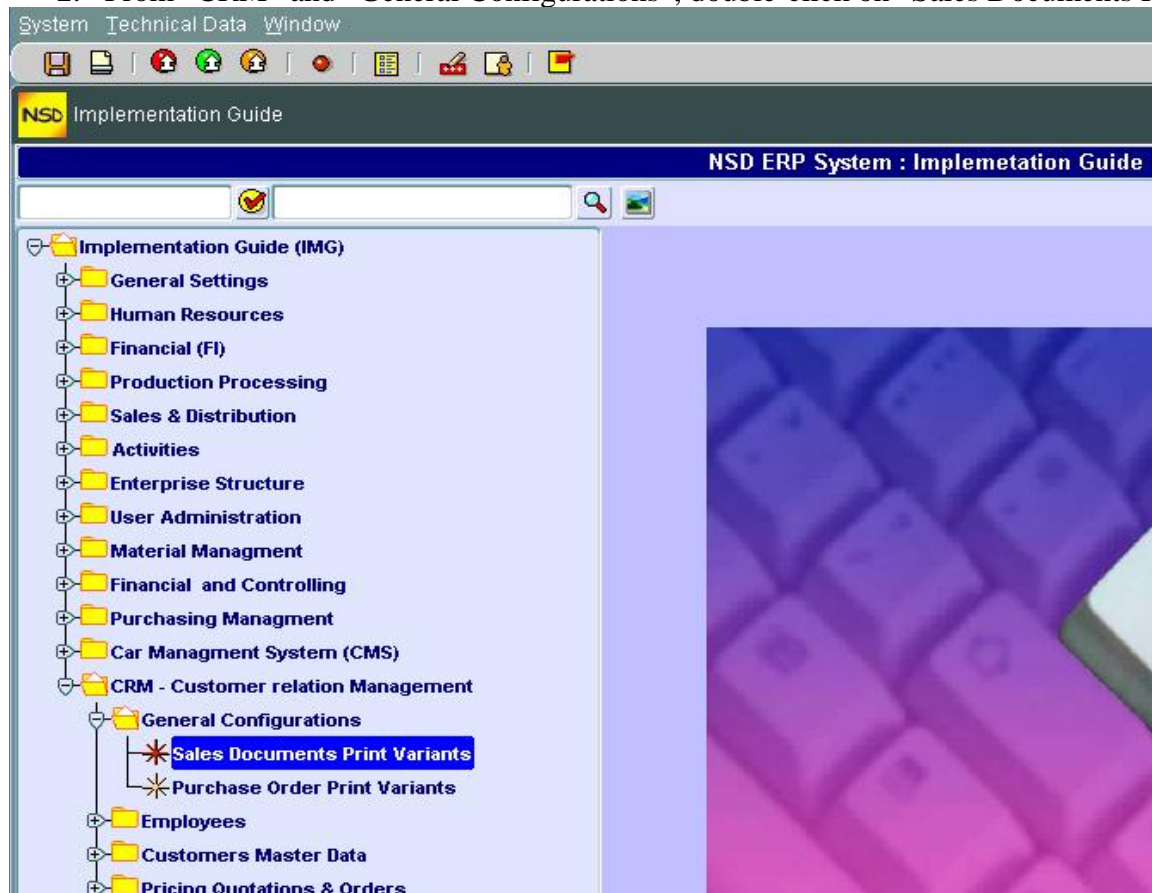
1. First we have to use the IMG to create the “Template Variant”
2. Then we will use the regular system to create the content (Header, Body (material), and the Tail) of the template.

A- Creating the Template variant

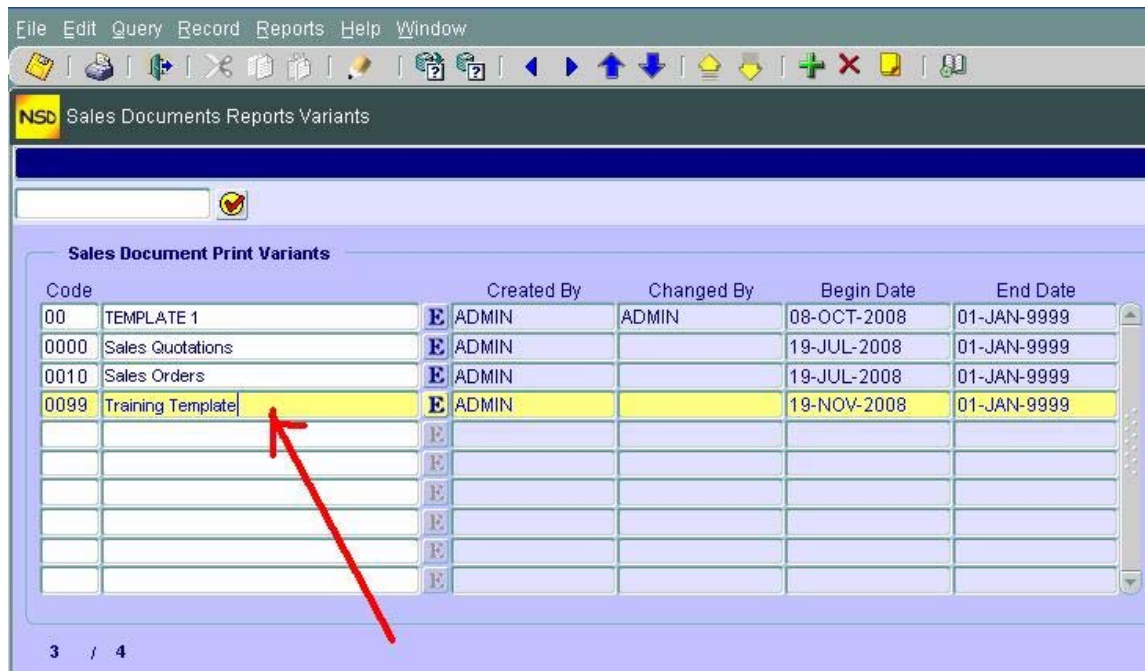
1. From the Main Menu, Click on “System” and choose “IMG”






2. From “CRM” and “General Configurations”, double-click on “Sales Documents Print Variants”




3. Enter Code number and Description for your variant (“Training Template in our example”)

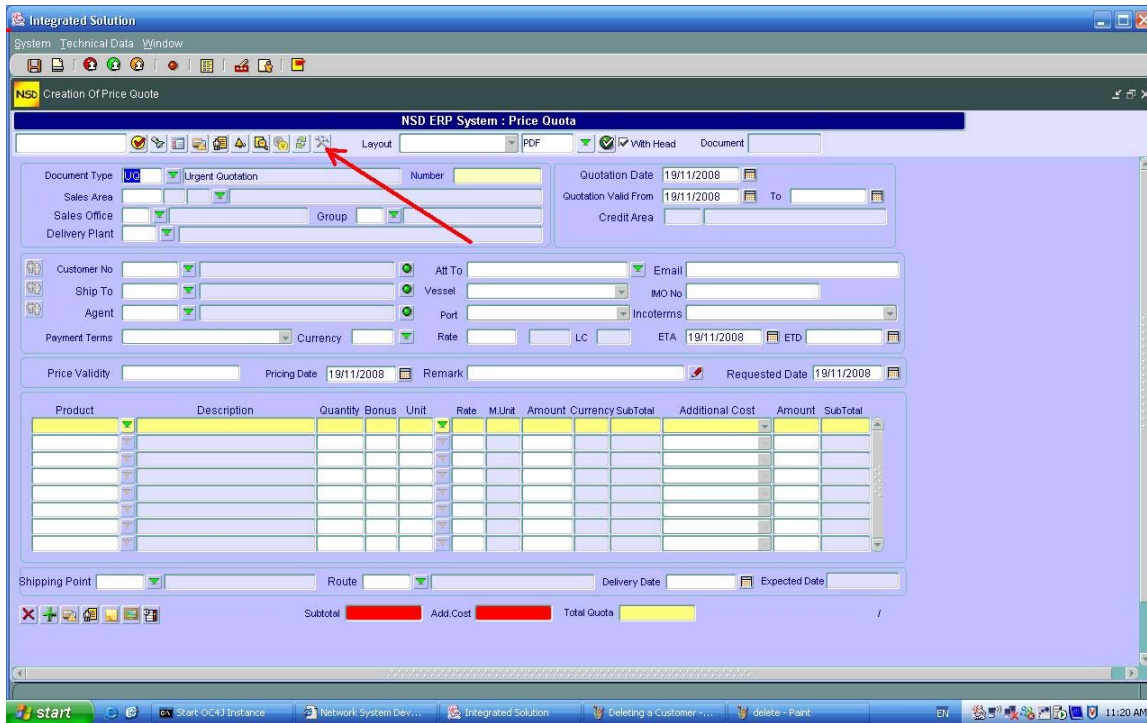


4. Save your variant by clicking on icon 
5. Repeat step 3 and 4 for other Templates
6. Exit the variant creation by clicking on “Exit icon” 
7. Exit from the IMG by clicking on 

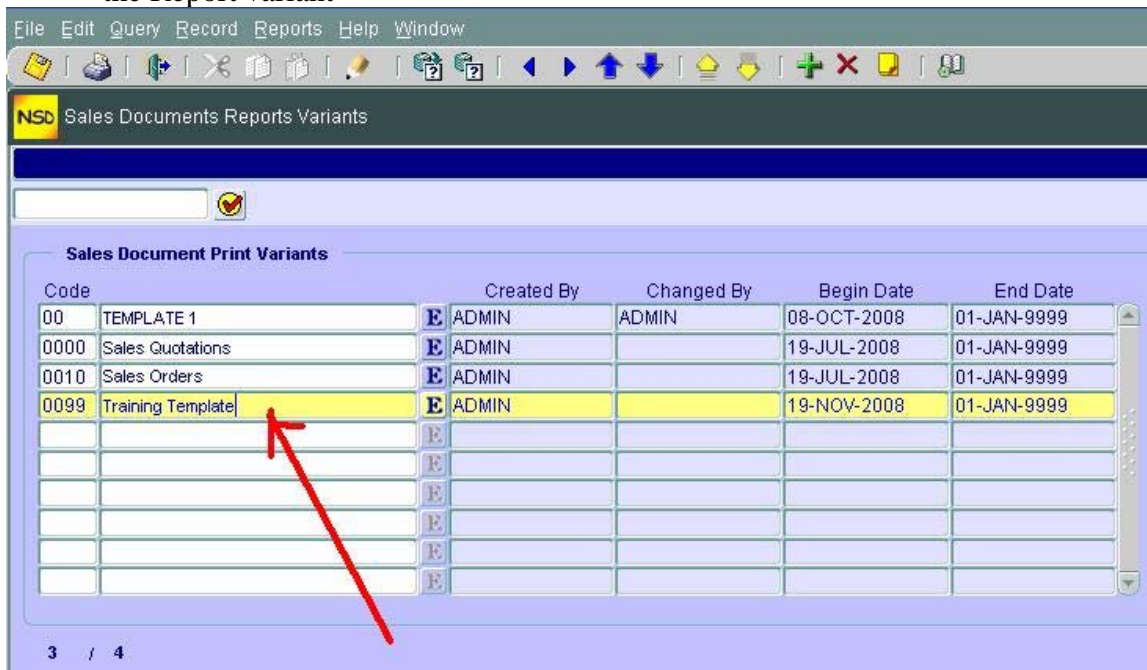
B - Creating the Template

From the Main Menu “Sales Documents” and “Sales Quotation”:

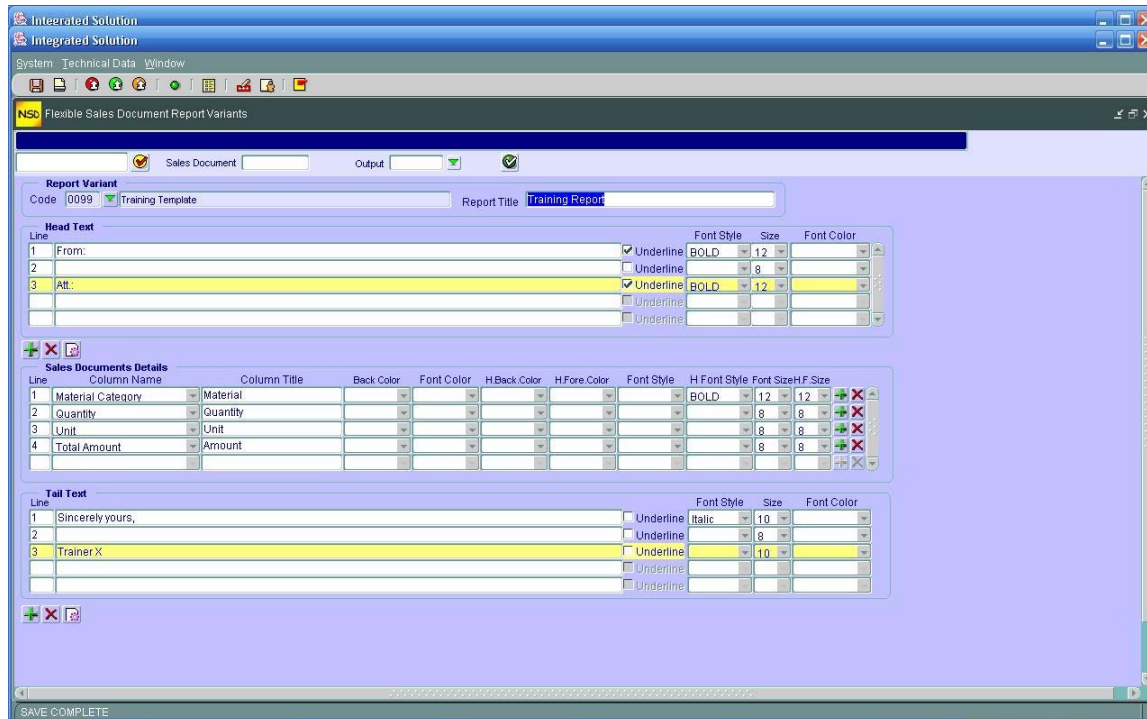
1. Double-click on “Create Sales Quotation”
2. On the screen “Creation of price Quote”, click on “Output design” icon 





3. On the “Flexible Sales Document Report Variants” screen, click on the Pull down menu to select the Report variant



4. In the “**Head text**”, type in, for EACH LINE, the header content by choosing the different formatting options (Underline, Font style, Font size and Font color)

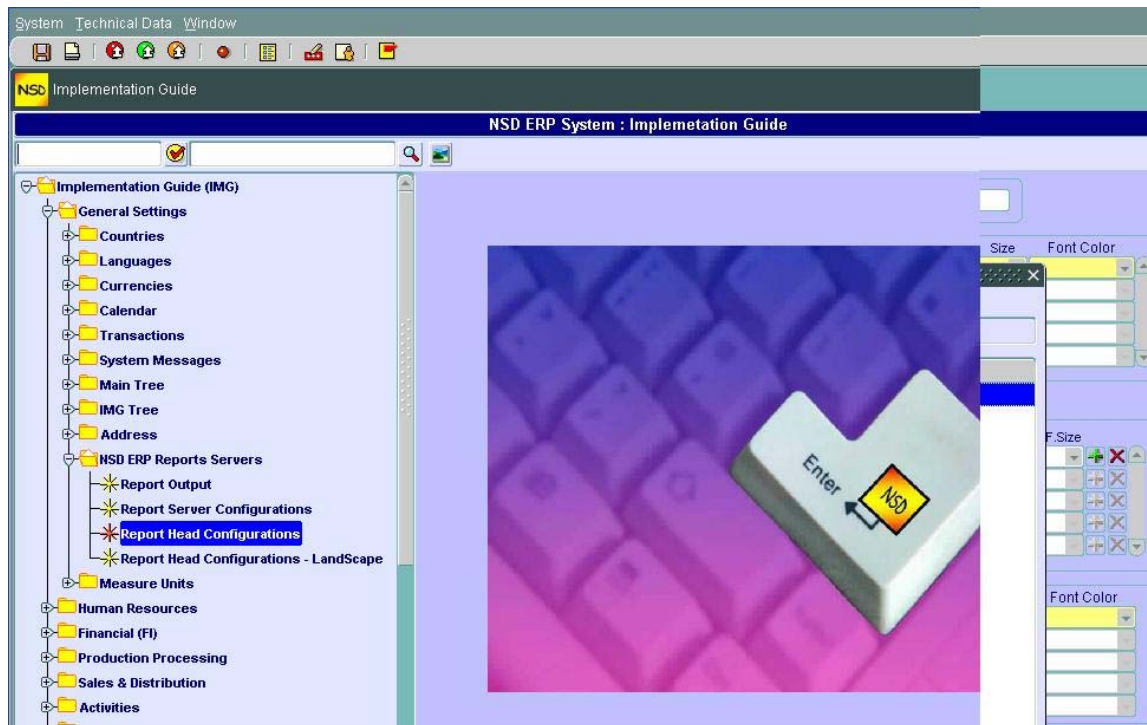





5. Move on to the “**Sales Documents Details**” and do the same thing for the style formatting. Use each time the drop down menu to make a choice for each field.
6. Save your work by clicking on 
7. Exit to the Quotation screen by clicking on 
8. On the Sales Quotation screen, choose the layout template you want through the drop down menu as shown

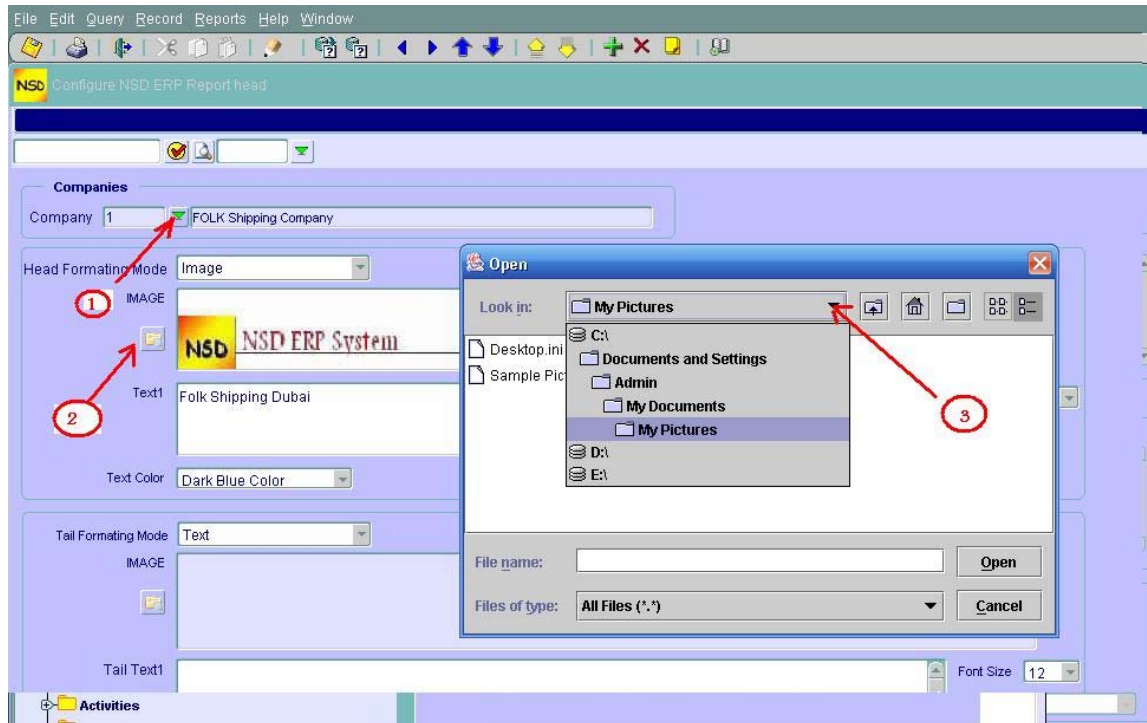
C - Creating a report header with a LOGO

If you want to create a report header (for quotation) with company logo, you will have to do it through the IMG. This is how you do it:

1. Go to the IMG (see step A-1 above)
2. From “General Settings”, choose NSD ERP reports Servers
3. Double click on “Report Head Configurations”



4. On the Report Header screen, Choose the company through the drop down menu (1)
5. In the “Head Formatting Mode” section, choose through the drop down menu “Image” (if you want to paste a logo” or “Text” (if you want just plain text).
6. Click on the “Import image” icon (2)
7. Brows to the file where the image is and insert it (3)
8. Add text in the Text area
9. repeat steps 5 to 8 for the “Tail Formatting Mode”
10. Save your work by clicking on 
11. Exit the configuration screen by clicking on 
12. Exit the IMG by clicking on 




EMPLOYEES

Hire New Employee

1. Hiring an employee is to be done for all permanent, salesmen or contractual personnel. The Payroll area determines if the employee will be paid or not and how this can be done (monthly, hourly ...)
- To hire a new employee, proceed as follows:
1. Double click "Hire new Employees"

The screenshot shows the 'NSD ERP System : Create Employee Manually' form. The form is titled 'NSD ERP System : Create Employee Manually' and is part of the 'Employees' module. It contains several sections for data entry:


- Employee Data:** Fields for Number, First Name, Middle Name, Last Name, Hiring Date, End Date, Created By, and Changed By.
- Employee Company:** A dropdown menu.
- Person Type:** A dropdown menu with 'Standard' selected, and radio buttons for Male and Female.
- Birthdate:** A date field.
- Mother Name:** A text field.
- Granfather Name:** A text field.
- Primary Language, Secondary Language, Religion:** Dropdown menus.
- Nationality:** A dropdown menu.
- NO Of Children:** A text field.
- Memo:** A text area at the bottom.

2. Enter all data **but** employee number (the system will assign it automatically)
Note: If you don't specify a Hiring date, the system will default it to the actual date
3. Save your data by clicking on 

Organization Assignment





This functionality allows to assign an employee to a structure in the company whether it be to a Sales organization or to a Personnel organization. This is done by:

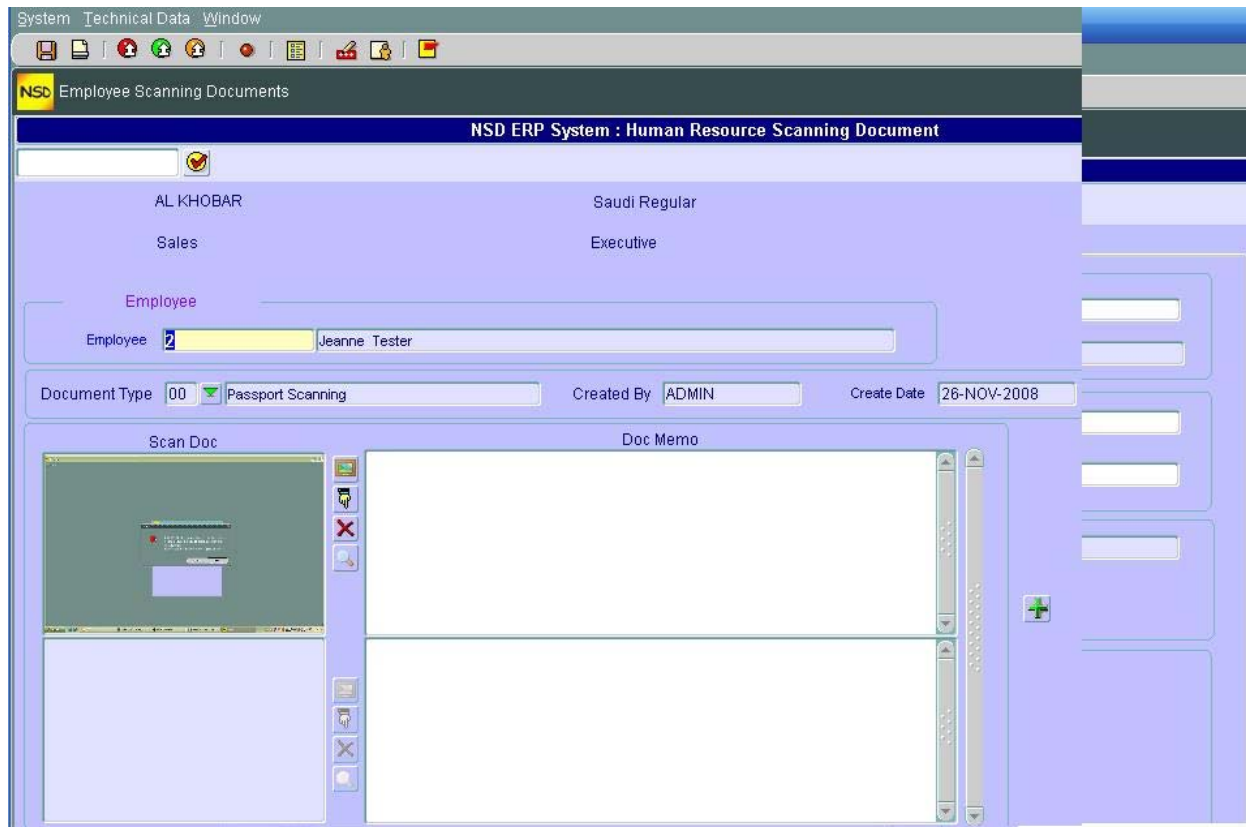
1. Double clicking on the "Organization Assignment" tree element



2. Enter the Employee number through the drop down menu. Some of the fields may be filled in by the system if they contain data otherwise fill the empty ones through the drop down menus (you can change the existing ones).
3. save your entries by clicking on 

Maintain Employee Data


You only can perform the maintenance on already **existing** (created) employees. This functionality allows you to change the data entered in Hiring.

1. Double click on "Maintain Employee Data"
2. Enter the Employee number through the drop down menu
3. Click on change icon . That brings to the "Hiring screen" but this time filled by data.
4. Change the fields you want
5. If you want to change or load Employee picture, click on 
6. If you want to do Employee Assignment (reassignment), click on 
7. If you want to load scanned documents (passport, driver license....), click on .



8. Click on  to download the scanned doc
9. Add any comments on the right side **section** (Doc Memo) of the loaded picture
10. Click on  to add another scanned doc
11. Repeat steps 8 to 10 for other additional documents

NOTE:

To **upload** scanned documents ie, put the scanned documents in the database, click on  and follow the instructions.

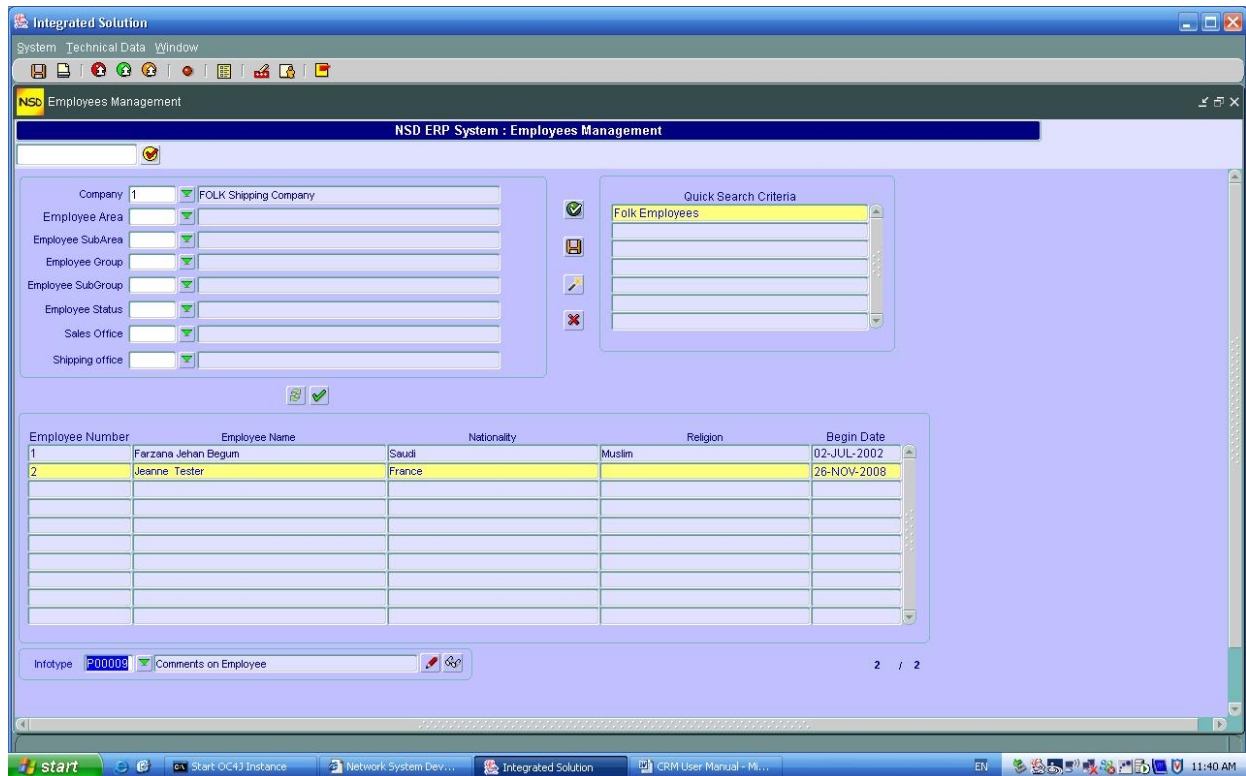
Display Employee Data





The "Display Employee Data" functionality will allow you to display **ONLY** the Employee data. The screen is similar to "Maintain Employee Data" with the difference that you **cannot** change the data.

Employee Management

This functionality is similar to the "Customer Management" utility wise. It represents an Employee management **console** ie, you can manage all employee data from this screen using infotypes. You can also search employees and save search criteria (just as in customer management).

1. Double click on "Employee Management"



2. Enter the Search Criteria wanted by filling the fields
3. Click on execute 
4. If satisfied, you can save this Search Criteria by clicking on save  and then entering a description for the Search Criteria
5. Refer to "Customer Management" for how to change or delete a Search Criteria
6. Click on the employee Line
7. Choose the infotype that you want to maintain for the selected employee through the drop down menu "Infotype"
8. Click on either  (to change/maintain) or  (to display data only)






Employee Reports

The reports here are of two kinds:

- A kind of Query reports (Employee List) where you can determine the columns of data that you want to report on
- A sort of grading or commenting on the employee (Employee Comments)

A - Employee List

1. Double click on "Employee List"




2. Fill in the search criteria
3. Write a description for your report in field "Report Title"
4. Click on drop down menu  for "Output Column 1" to choose the first data to report on
Remark: At any time, if you make a mistake or want to **delete** a chosen data for a column, click on 
5. Repeat step 4 for other columns
6. Choose the report support that you want (PDF, HTML....) through the dropdown menu 
7. Save your Query by clicking on 
8. Click on Print Preview  to print your report

B – Employee Comments

If you want to search employees by score or by comment class and comment type (for promotion or just for any particular comment for example) this reporting functionality is just what you need.

1. Double click on "Employee Comments"

The screenshot shows a web-based query builder interface for 'NSD ERP System : HR - Employees Comments'. The interface includes a title bar with 'System Technical Data Window', a toolbar with icons for save, print, and other actions, and a dropdown menu currently set to 'HTMLCSS'. The main area contains several filter groups, each with 'From' and 'To' fields and a dropdown arrow. The filter groups are: Company, Person Type, Status, Payroll Area, Emp Group, Comment Class, Emp SubGroup, Comment Type, Personal Area, and Personal SubArea. Additionally, there are fields for 'Highlight Scores Bigger Than' and 'Active Date' (set to 26/11/2008).

2. Fill in the fields especially fields **Comment Class** , **Comment Type** and **Score**
3. Choose the report support that you want (PDF, HTML....) through the dropdown menu

4. Save your Query by clicking on 
5. Click on Print Preview  to print your report

PRODUCTS MANAGEMENT

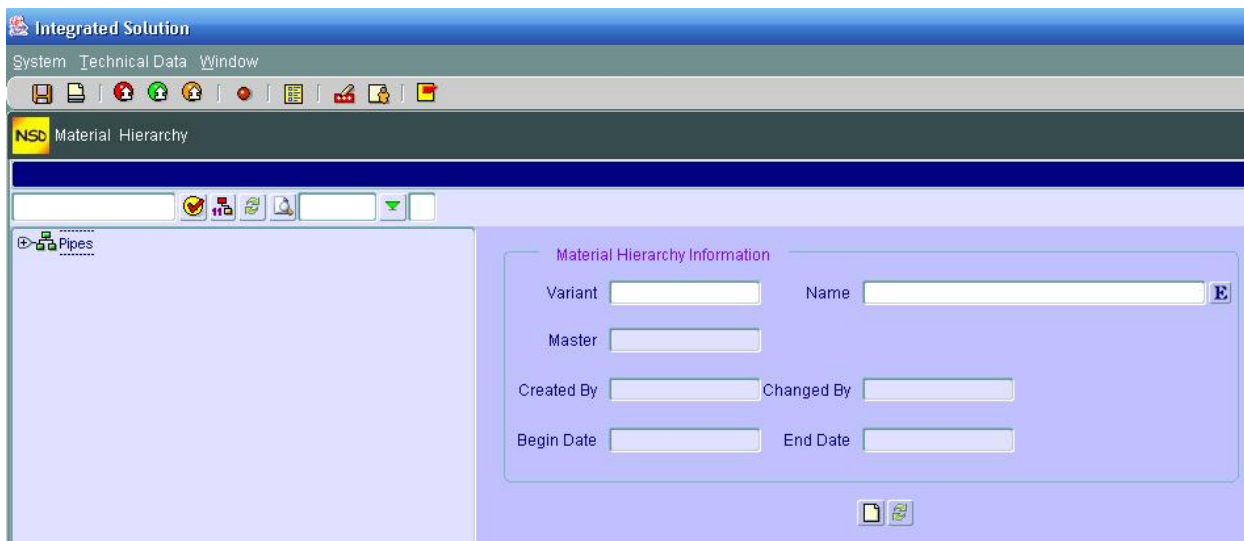
A – Products Hierarchy




Products hierarchy is used to give a user a tree wise structure for the products to be sold or purchased. In this graphical representation of products, you can search a product visually. This functionality is optional and as stated earlier, it is made to ease user's reading of products structure.

Create Products Hierarchy

In this step, you will learn how to add a product to a tree from the root or sub-roots.

1. Begin by double clicking on "Create Products Hierarchy". You will get

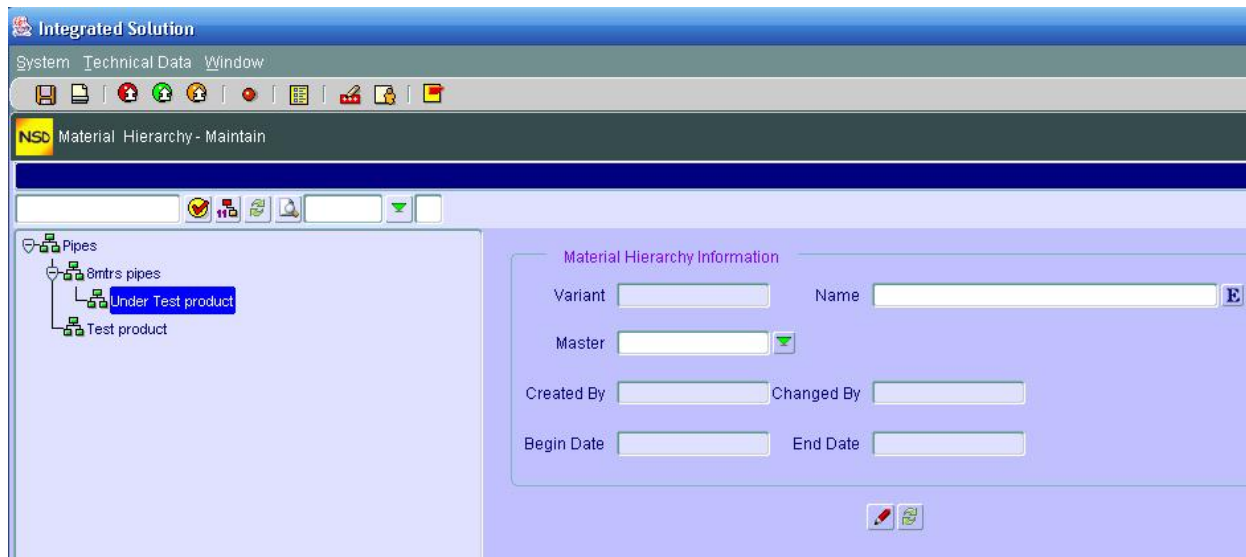


2. If you want to create a NEW Root, DON'T highlight (don't click) on any product. Instead, enter directly the Variant code (number) and the description of the Root product and click on create 
3. If you want to Add a product to an already existing Product category, click (highlight) the Product Category
4. Enter the variant code and its description and click 
5. Repeat step 4 for other products under the same Product Category or step 3 for other Products
6. Save your entries by clicking on save 

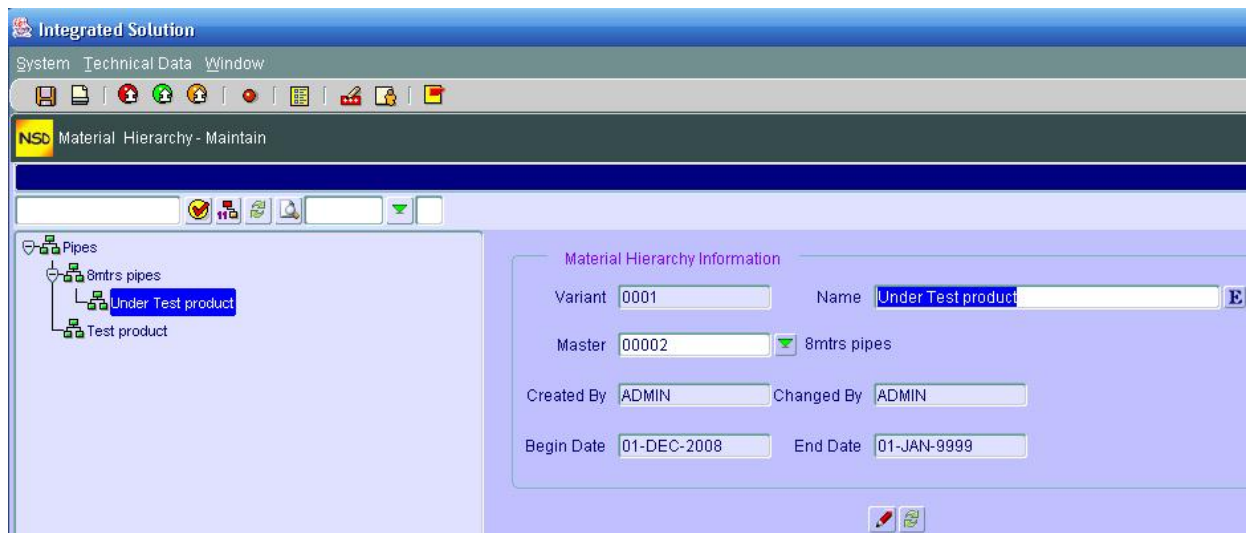
Maintain Products Hierarchy

This functionality will allow you to change (edit) the product hierarchy. Here you can change a product "place" from one Product category to another product category for example or make a product as "a

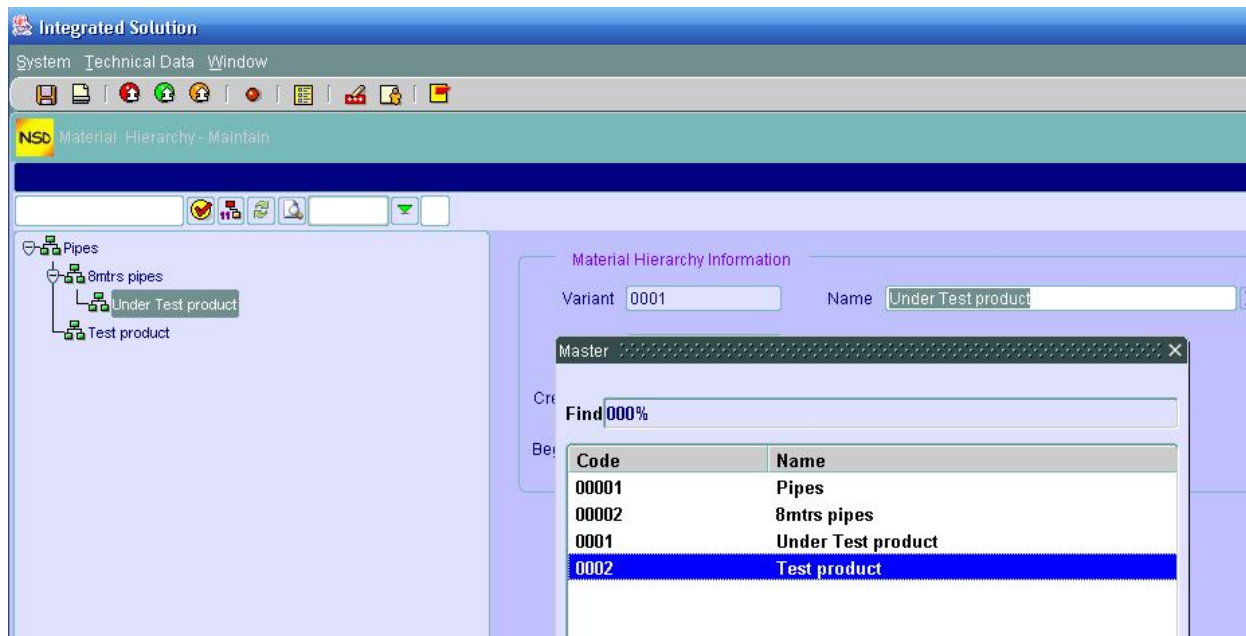
product category". To illustrate this, let's take an example. We want to move the product "Under Test Product" from Product Category "8mtrs pipes" to Product Category "Test Product".




1. Double click "Maintain Products Hierarchy"
2. Double click on the Product you want to move (in our example "Under Test Product") (the section on right "Material hierarchy Information" should be filled with the product information)




3. Click on the **Master** drop down menu and choose where you want to displace the product you have chosen (in our example to "Test Product" Variant code)




4. Click on change 
5. You should see the change immediately on the tree
6. If you want the chosen product to be a Root product (change it From a sub-product To a Product Category, choose a null value (no value) in the Master drop down menu.

NOTE:

At any time if you want to display the Hierarchy Tree with the Variant codes, click on 


Display Products Hierarchy

As in all Display functionalities, you can ONLY see the Products information and you cannot change anything.

1. Double click on "Display Products Hierarchy"
2. If you want to display the information on any product, double click on it and it will be displayed in the section on the right pan.
3. Here again if you want to display the Variant codes along with the products, click on 

Delete Products Hierarchy

You can delete a product or a Product category (Product root) from the product hierarchy by:

1. Double click on "Delete Products Hierarchy"
2. Double click on the Product or Product Root
3. Click on 
4. Confirm the deletion

B - Products Master Data

The master data represents the heart of a product in that it contains all essential information pertaining to it. Creating a master data for a product is like creating a master data for a customer. You can do it through an Action (where all the defined screens will come one after the other) or do it through the Product Management where you have to call the infotype (screen) that you want to populate.

Product Action

The Action types were defined in the IMG during configuration. This is why the action tree might change from one system to another. In this tutorial, there were 4 action types defined:


- Add New Material
- Block Material Usage
- Change Material Structure, and
- Hold Material for sales



Since the concept is the same, let's review in detail the "Add New Material"

1. Double click on "Product Action". You get a screen similar to this



2. Double click on "Add New Material". You will get the first screen for material Information which will look like

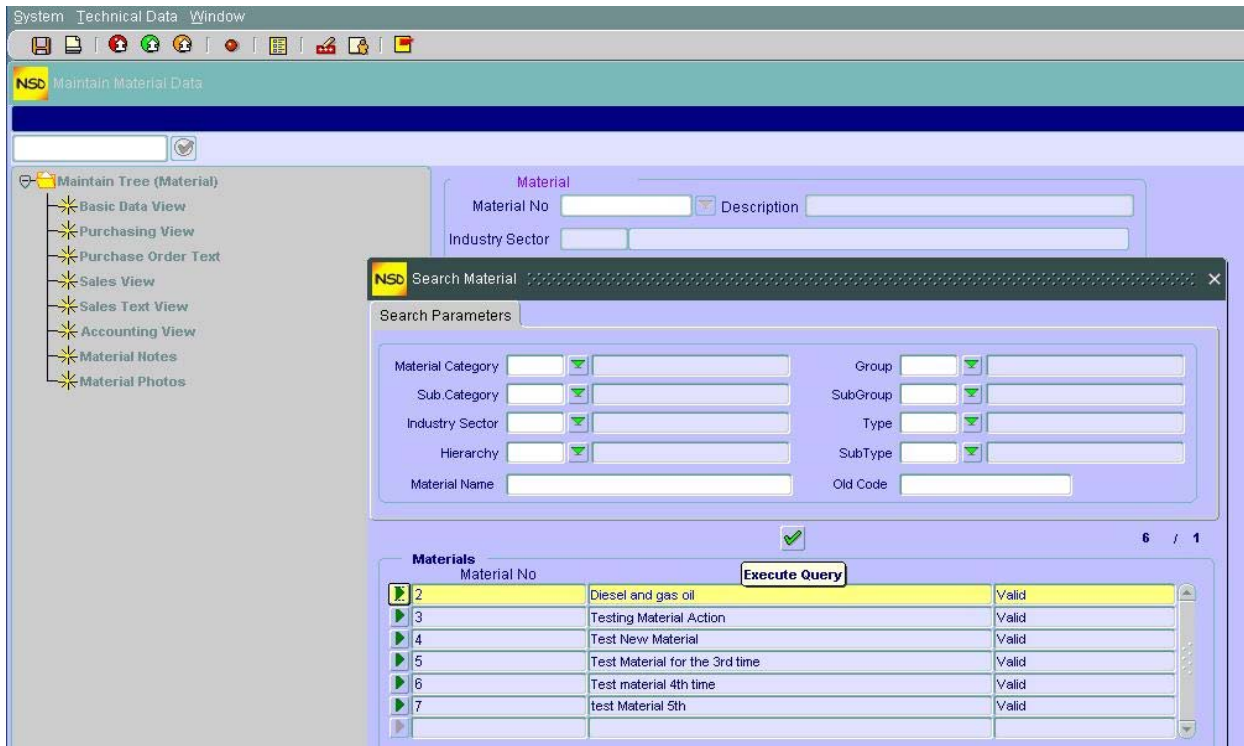
3. After completing the fields (Material No is given by the system), click on execute . You will be taken to the second screen such as



4. Save by clicking on 
5. Click on continue  with the rest of the screens (don't forget to save your entries at each step)





Maintain Product Data

As in all maintenance functionalities, you can do this only on already existing (created) material. This functionality will allow you to change or complete missing data (screens).

1. Double click on "Maintain Product data". You will get a screen similar to the following (keep in mind that the tree on the left pan is CONFIGURABLE ie, it's the client who determines what infotypes (screens of data) have to be in the tree).



2. Choose the material to be maintained through the drop down menu "Material No". Notice that if you want to have a list of all material, click on execute  without entering any parameter in the Search sub-screen (pop up window)
3. Click on  next to the Material to be maintained

4. You will notice on the left pan that the "empty" infotypes have a red cross  while those who contain data have the mark 
5. To choose an infotype to maintain, you have 2 options: either choose it through the drop down menu "Screen" in Material Forms section or just double click on the infotype in the tree (if it shows there).
6. Fill in the data needed and save 
7. Go back to the main maintenance screen by clicking on 
8. Repeat step 4 to 6 for other infotypes

Display Product Data

This functionality is similar to Maintain Product Data with the difference that you **cannot** change or maintain any data for a material; just display it.

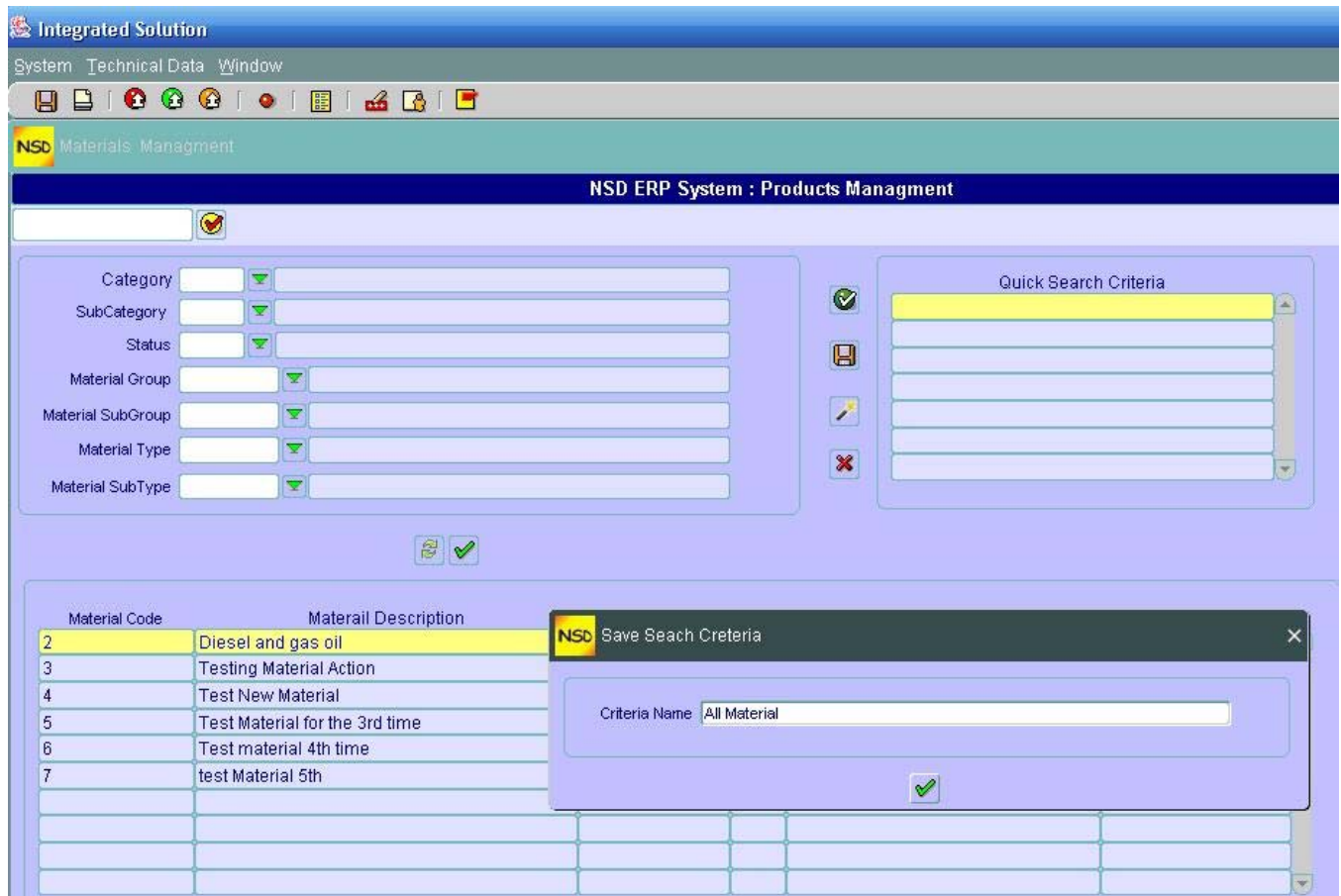
Product File









Similar to Display Product Data with the difference that you (as a client) specify what infotypes are to be displayed or important for a material information.

Product Management

This functionality as in Customer or Employee management constitutes the cockpit from where you can search for a material or group of material and can save your Search Criteria for later use. From here also you can maintain a material through the choices of diverse infotypes.

1. Double click on "Product Management"



2. Fill in the Search parameters you want
3. Click Execute 
4. Check your results and if satisfied, you can save this Search Criteria by clicking on 
5. Enter a description for your Search Criteria and hit 
6. Click on a material to select it
7. Choose an infotype to maintain for the selected material through the drop down menu "Infotype"
8. Here you have the options to either Create , Change  or Display  the infotype for the material. Don't forget to save your data if you Create or Change it by clicking on 
9. Hit  to go back to the main screen "Product Management"

C - UTILITIES



The utilities section will allow you to create a Material rapidly (instead of doing it through an Action) and then later on, you can maintain the other data.

In addition, you can change the material status (block it, hold it for sale or hold it for purchase etc...) or display the history for a material status changes.

Quick Material Creation

To quickly create a material

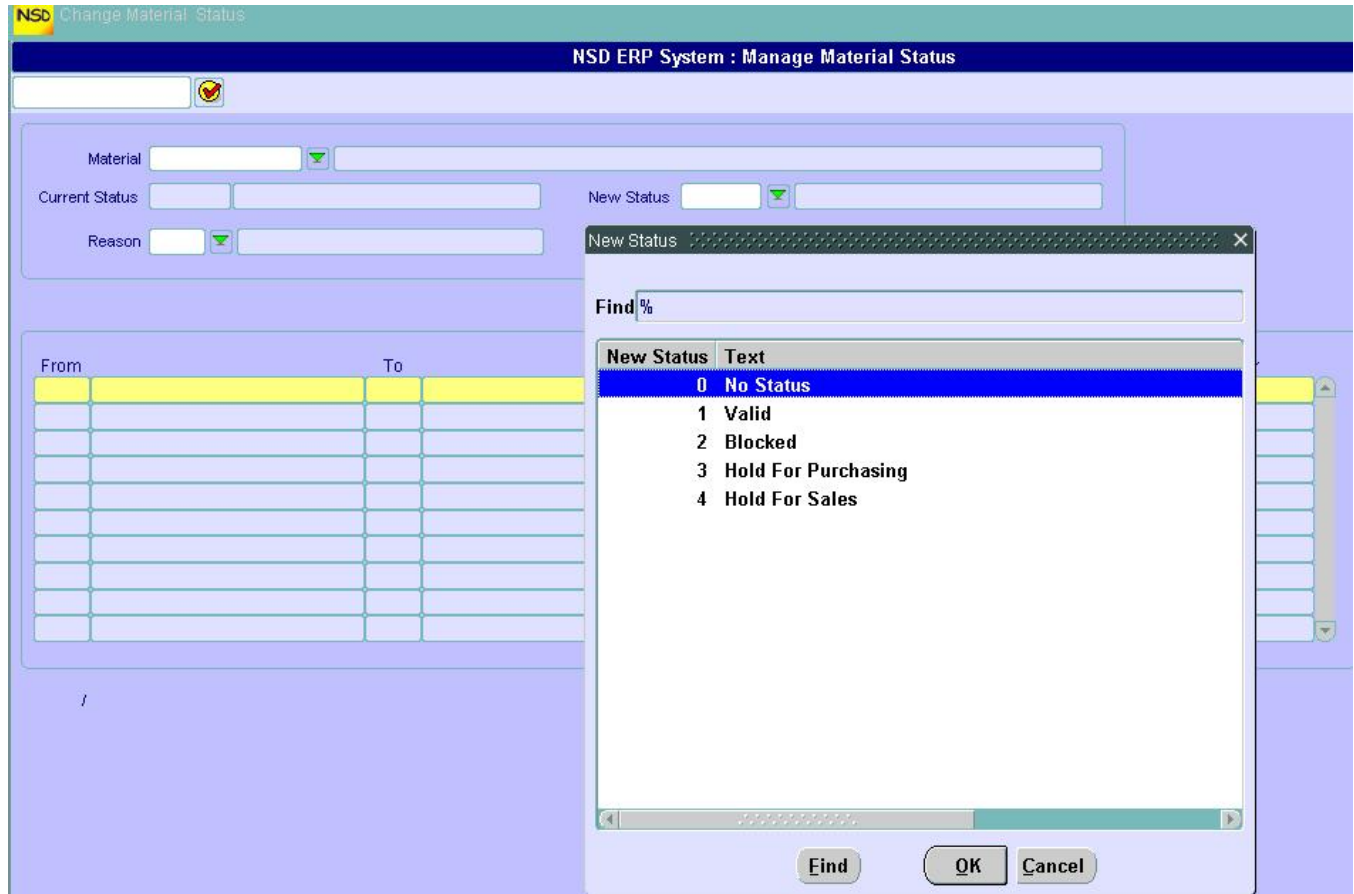
1. Double click on "Quick Material Creation"

2. Enter the code which came with the material if you desire in the field "Old Material Code" (this is just for references and is optional)
3. Enter a description for the Material and fill in the rest of the fields as needed
4. You can add comments on the material in the section "Remarks"
5. Save your entries 
6. Go back to the main screen by clicking on 

Material Status Management

You can change the status for a material (block it for example) by:

1. Double click on "Material Status Management"

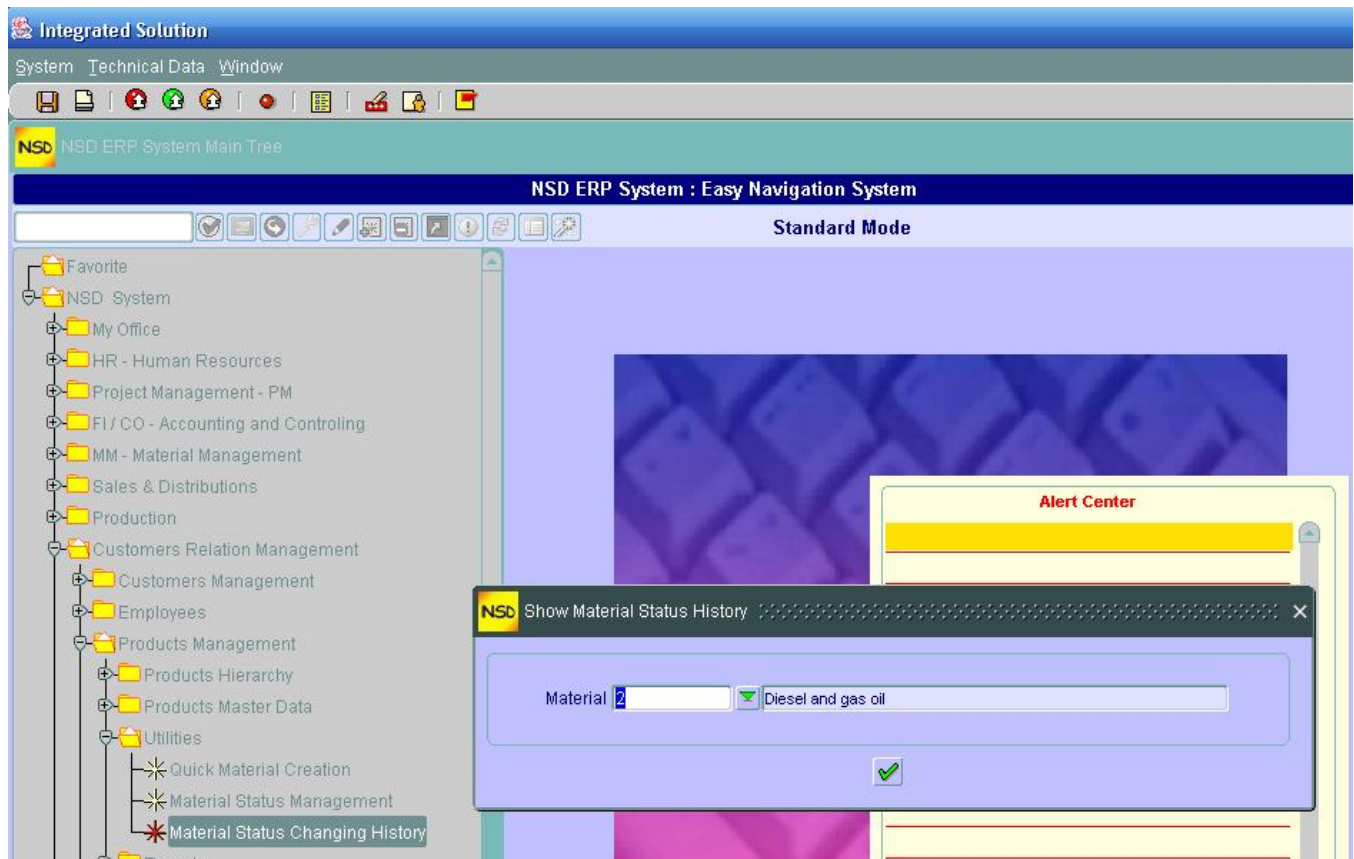



2. Choose the new status through the drop down menu "new Status"
3. Give a reason (this is for reporting purposes)
4. Save

Material Status Changing History

This functionality will display all the statuses the selected material went through. Using this history, you will know **who** changed what for all material. To get to this:

1. Double click the "Material Status Changing History" under "Products Management's Utilities"
2. Select the material through the Drop down menu



3. Click the execute button 
4. The material status history is displayed

D – REPORTS

List of Materials

You can have a report on all material used by your company through this functionality. This report has been configured to give a list of all materials used. Just double click on the "List of Materials".

Like for all other reports, you can set up which format you will be using the report with (Pdf, Xml...)

VENDORS MANAGEMENT




A – VENDORS HIERARCHIES

Vendor hierarchy is a graphical representation of your vendor structure. With this functionality, you can search and select your vendors graphically and visually. The procedure is the same as the one found under "Products Management"

Create Vendors Hierarchies

In this step, you will learn how to add a Vendor to a tree from the root or sub-roots.

1. Begin by double clicking on "Create Vendors Hierarchies". You will get

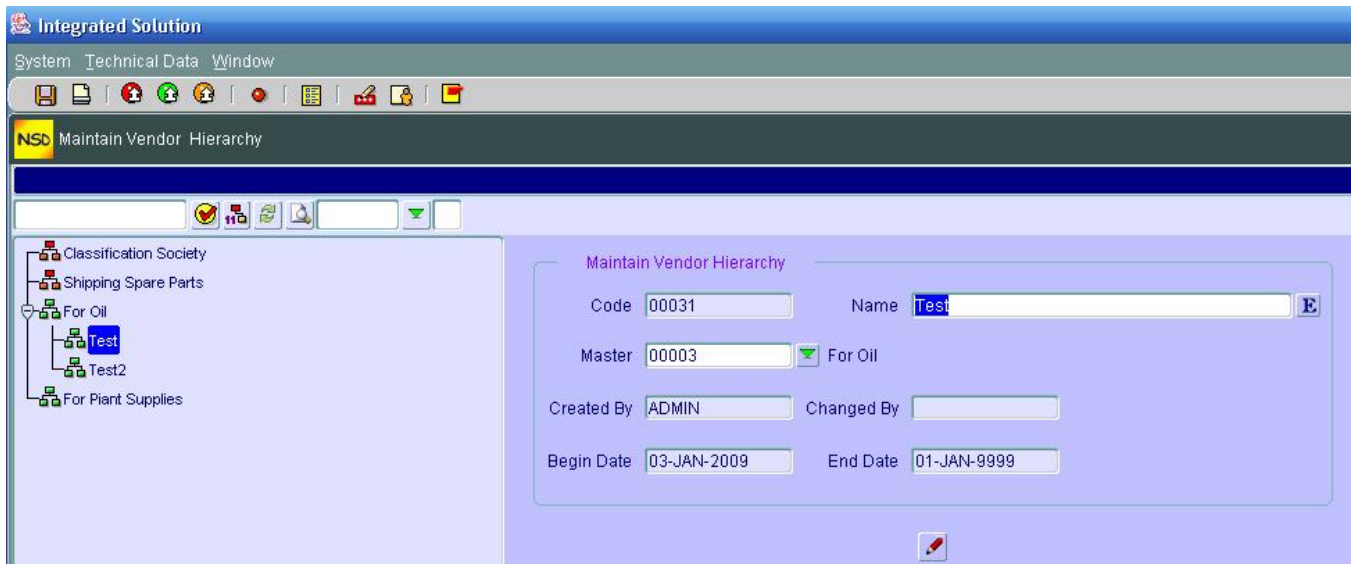
2. If you want to create a NEW Root, DON'T highlight (don't click) on any Vendor. Instead, enter directly the Vendor group code (number) and its description and click on create 
3. If you want to Add a Vendor to an already existing Vendor Group, click (highlight) the Vendor Group
4. Enter the Vendor code and its description and click 
5. Repeat step 3 for other Vendors under the same Vendor group or under other Vendor Groups
7. Save your entries by clicking on save 

Maintain Vendors Hierarchies

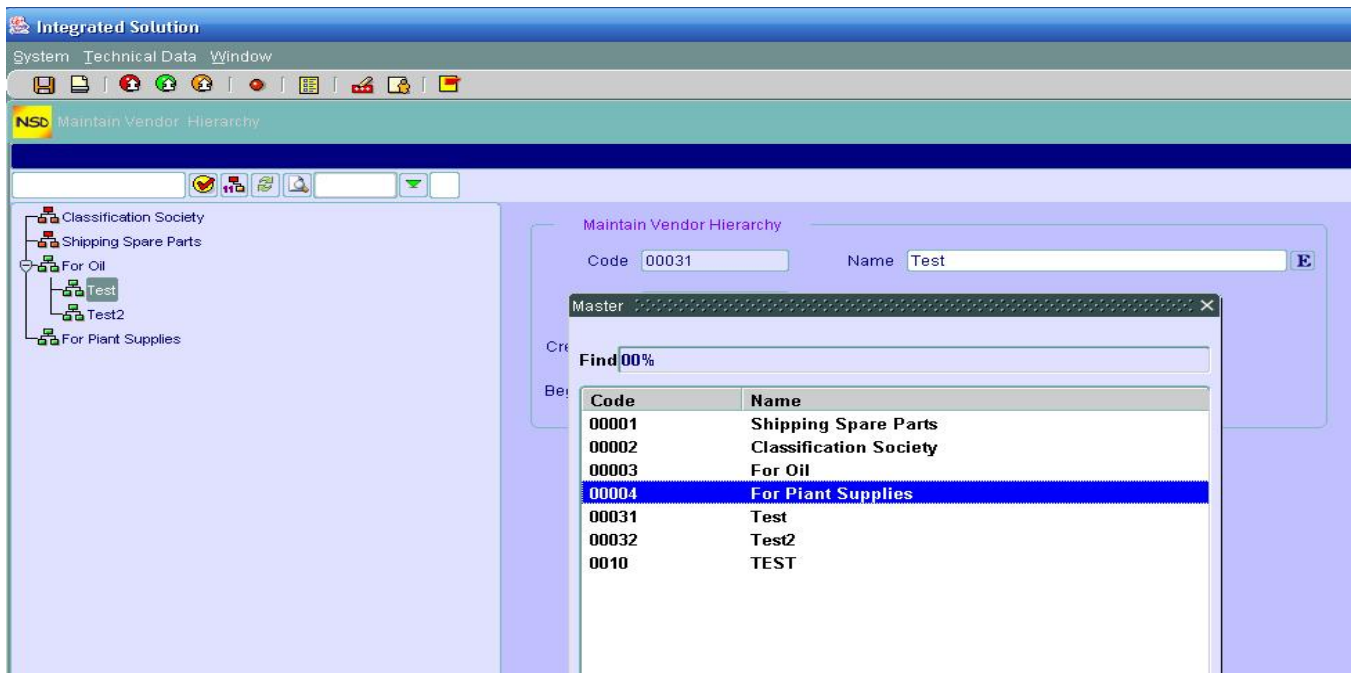
This functionality will allow you to change (edit) the Vendor hierarchy. Here you can change a vendor "place" from one Vendor group to another Vendor group for example or change a Vendor name . To


illustrate this, let's take an example. We want to move the Vendor "Test" from Vendor group "For Oil" to Vendor group "For Plant Supplies".

1. Double click "Maintain Vendors Hierarchies"
2. Double click on the Vendor you want to move (in our example "Test") (the section on right "Maintain Vendor hierarchy " should be filled with the Vendor information



7. Click on the **Master** drop down menu and choose where you want to displace the Vendor you have chosen (in our example to "For Plant Supplies" Vendor code)




8. Click on change 
9. You should see the change immediately on the tree
10. If you want the chosen Vendor to be a Vendor Group instead (change it From a sub-vendor To a vendor Group, choose a null value (no value) in the Master drop down menu.

NOTE:

At any time if you want to display the Hierarchy Tree with the Vendor codes, click on 


Display Vendors Hierarchies

As in all Display functionalities, you can ONLY see the Vendors information and you cannot change any thing.

1. Double click on "Display Vendors Hierarchies"
2. If you want to display the information on any Vendor, double click on it and it will be displayed in the section on the right pan.
3. Here again if you want to display the Vendor codes along with the Vendors, click on 

Delete Vendors Hierarchies

You can delete a vendor or a Vendor Group (Vendor root) from the Vendors hierarchies by:

1. Double click on "Delete Vendors Hierarchies"
2. Double click on the Vendor or Vendor Root
3. Click on 
4. Confirm the deletion

B - VENDORS MASTER DATA

Customer master data contains the shared information about Vendors.

The 4 functionalities of the Master data are:

- **Vendor Actions:** to be used when creating a NEW Vendor
- **Maintain Vendor Data:** to be used to change the data about an EXISTING Vendor
- **Display Vendor Data:** as the name implies it, this is to be used just for viewing Vendor data (you cannot change any information in this functionality). This mode will show all the infotypes (screens) containing data that are either complete or not complete.
- **Management Vendors Data:** This functionality represents the cockpit of the Vendor management. From this you can access any data about the Vendor or make search besides other functionalities that we will see in the following.

Vendor Action

To ADD, BLOCK or HOLD Temporarily a Vendor, we perform an Action.

From the Main Menu:


❖ **Add a Vendor**


1. From the CRM → Vendors Management → Vendors Master Data
2. Double Click on “Vendor Actions
3. To ADD a Vendor, double-click on “Add new Vendor”. You should see


4. Start by filling in the Account Group and down the other fields. **Don't try** to input the "Applicant No" nor the “Vendor No”; that will be filled in by the system.
5. Once you enter all fields, click on execute
6. You will be taken to another screen (Vendor Address). Fill in the information needed


Note: If you want more Communication details click on and add the ones you want (after each line, click on to add another line).

7. Save by clicking on
8. Click on to get on the following screen (Vendor Accounting Information)


9. Fill in the details and click on  to save your screen info


Note: If you want to see the Terms of Payment details, click on 

10. Click on  to get to the next screen (Vendor Purchasing Data)

11. Fill in the information needed and click on  to get to the next screen.

Remark: You can skip a screen at any time if, for example, you don't have the information available. You will have the opportunity to do it later if you want.

12. Save your work by clicking on 

13. Click on  to get to the next screen (Vendor Bank Details)

14. And so on for the rest of other screens if needed or configured in the Action.

Note: The User should be aware that the screens contained in the Action are configurable ie, it's the client who sets out what screens should be included in the action.

❖ Block Vendor Data

The same principle as for Vendor Actions holds for blocking a Vendor. This action will bring successively some predefined screens to block a Vendor.

It starts by double clicking on the Action name i.e. "Block Vendor Data" which brings the main screen where you will **input** the Vendor number "**Vendor No**" and then fill in the rest of the required fields.

The screenshot displays the 'Vendor' data entry form in the NSD ERP System. The interface includes a menu bar with 'System', 'Technical Data', and 'Window'. Below the menu is a toolbar with various icons. The main window is titled 'Tree Actions - Vendor' and contains a tree view on the left with the following actions: 'Add New Vendor', 'Block Vendor Data', and 'Hold Vendor Temporary'. The 'Block Vendor Data' action is selected. The main form area is titled 'Vendor' and contains the following fields: 'Applicant No' (text input), 'Vendor No' (text input with a dropdown arrow, highlighted with a red circle and a red arrow pointing to it), 'Account Group' (text input), 'Vendor Hierarchy' (text input), 'Vendor Name' (text input), 'Vendor Status' (text input with a dropdown arrow, showing '0' and 'No Status'), 'RC' (text input), 'Currency' (text input with a dropdown arrow), 'Responsible' (text input), 'Vendor Area' (text input with a dropdown arrow), 'Vendor SubArea' (text input with a dropdown arrow), 'Vendor Group' (text input with a dropdown arrow), and 'Vendor Subgroup' (text input with a dropdown arrow). A green checkmark icon is visible below the 'Vendor Status' field.

Notice this time: you input the Vendor No and NOT the system which is quite obvious.

❖ Hold Vendor Data

The same principle as for blocking a Vendor data holds for Holding temporarily a Vendor data. This action will bring successively some predefined screens to Hold a Vendor data.



You start by double clicking on the Action name i.e. "Hold Vendor Data" which brings the main screen where you will **input** the Vendor number "**Vendor No**" and then fill in the rest of the required fields.

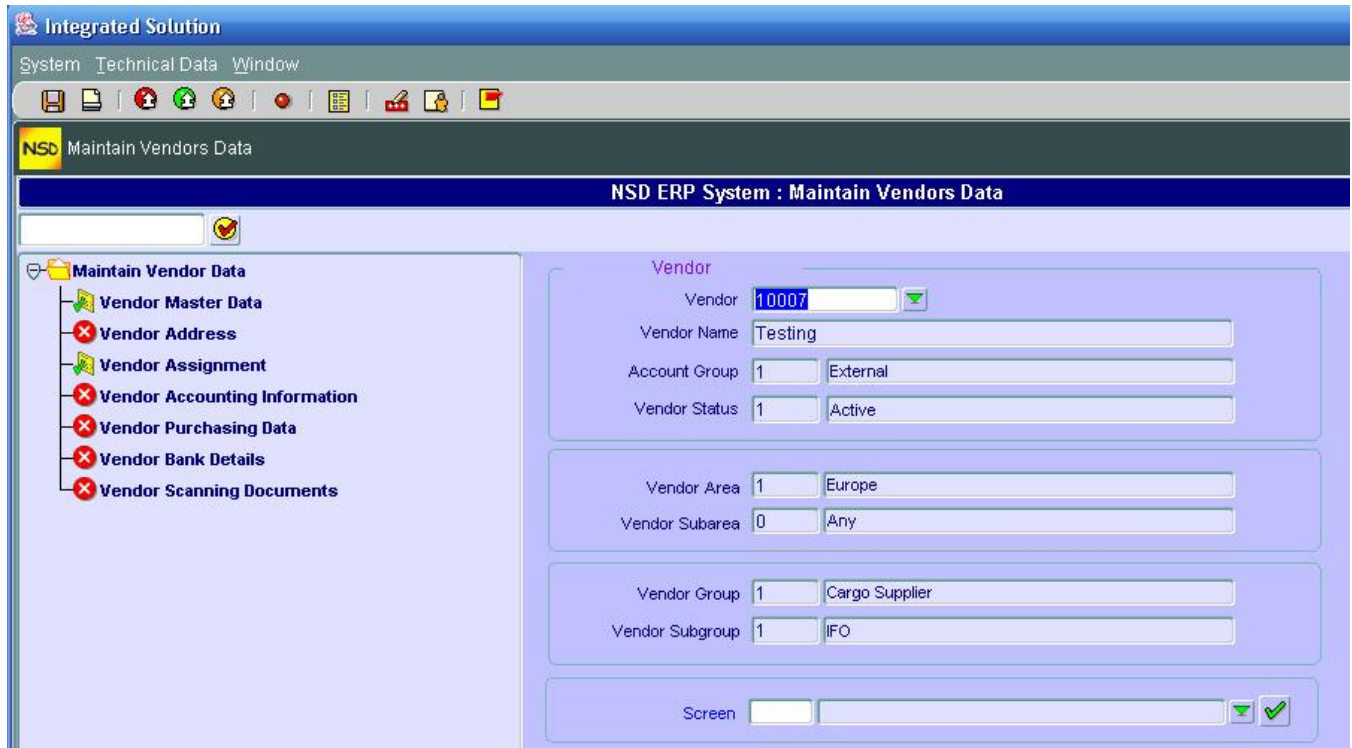
Notice also here that YOU input the Vendor No and NOT the system.

Maintain Vendors Data

This functionality gives you the opportunity to add, change or delete any data related to a Vendor. This is where you can take over the screens you "missed" (didn't complete) in "Vendor Actions" above.

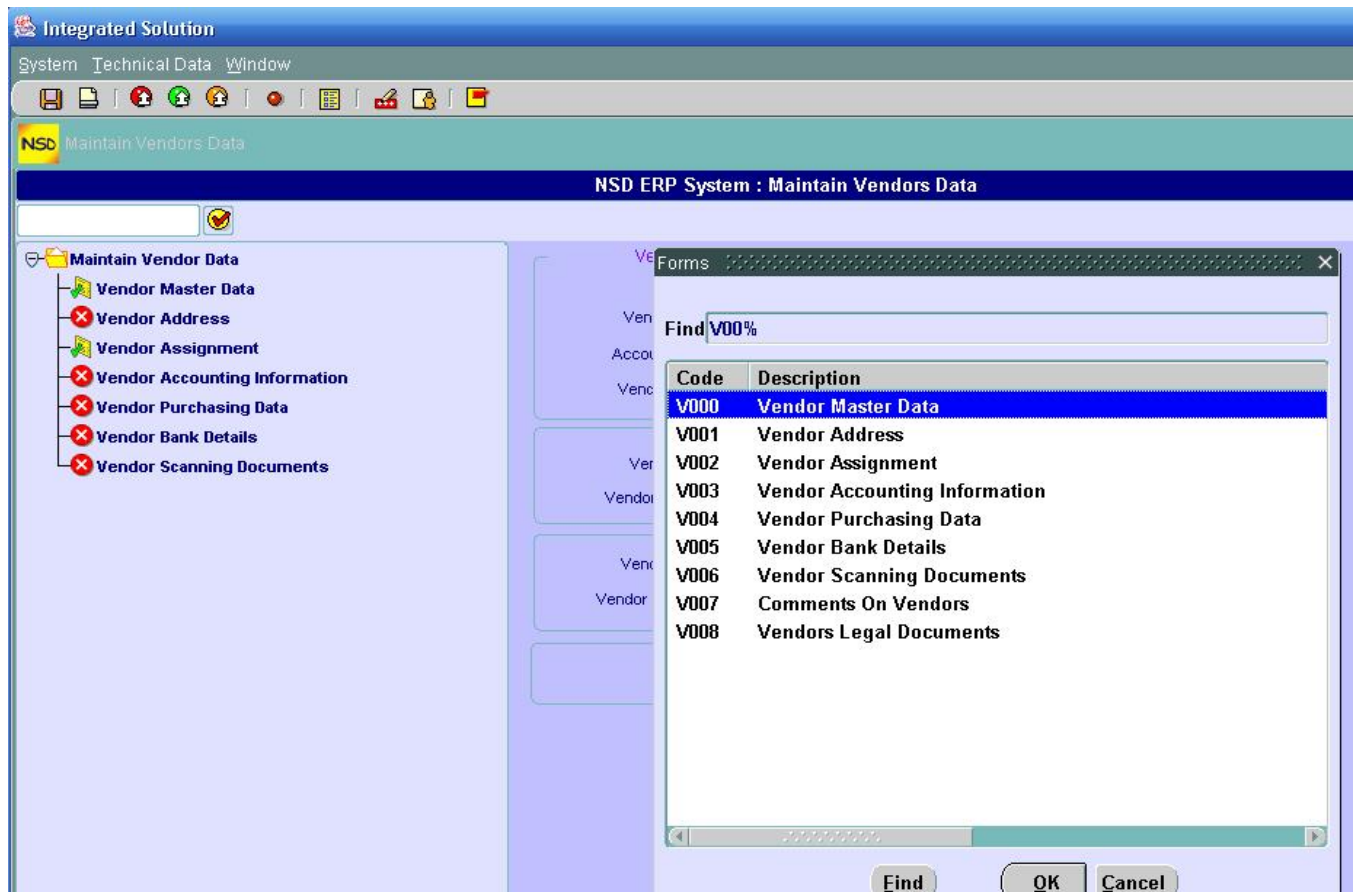
The tree for maintaining Vendor data is also configurable.

The good thing about this functionality among others is that, once you enter the Vendor number, the system will inform you immediately about the infotypes (screens) already maintained (icon ) or not (icon ) in front of the corresponding infotype.





Another facility is the fact that you can choose the infotype directly from the drop down window by clicking the arrow in front of the field “Screen”. This is useful in case an infotype has been skipped in the tree for the “Maintain Vendor Data”.

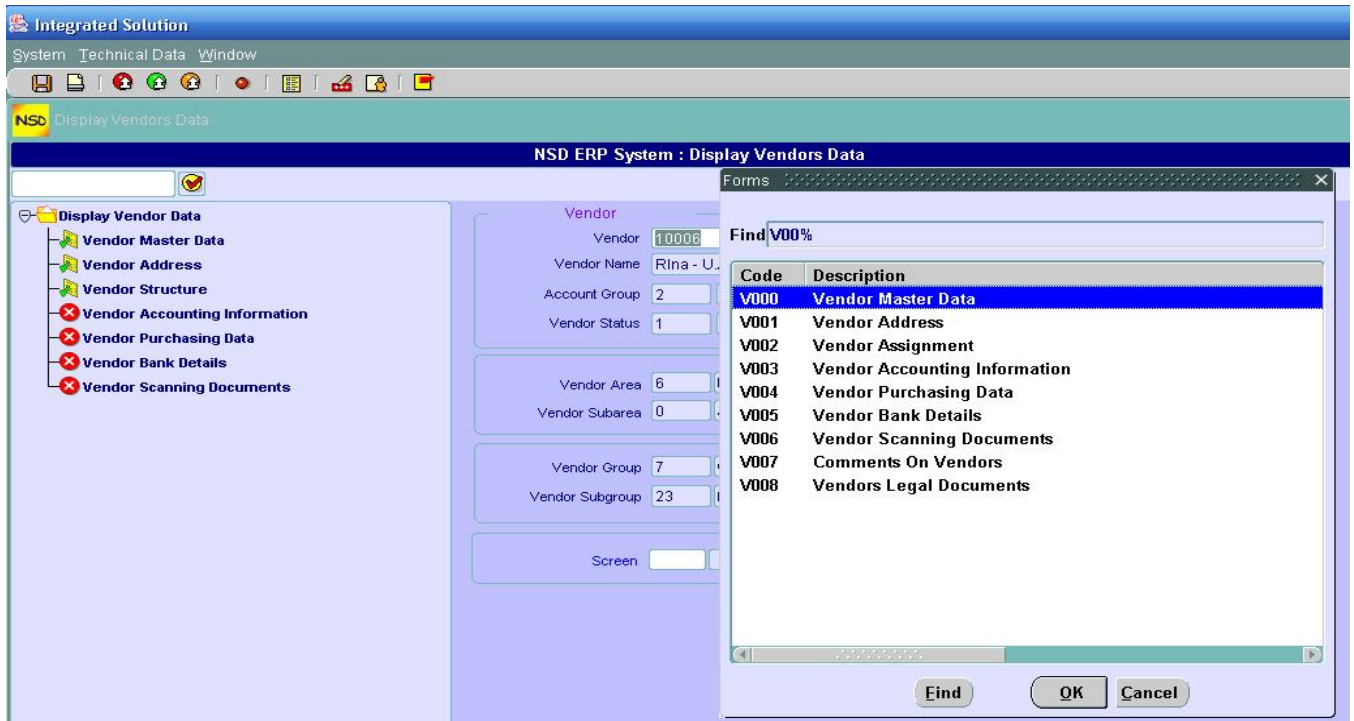
Once you click on the Screen drop down arrow, you will get the following window from which you can choose the screen (infotype).



Display Vendor Data

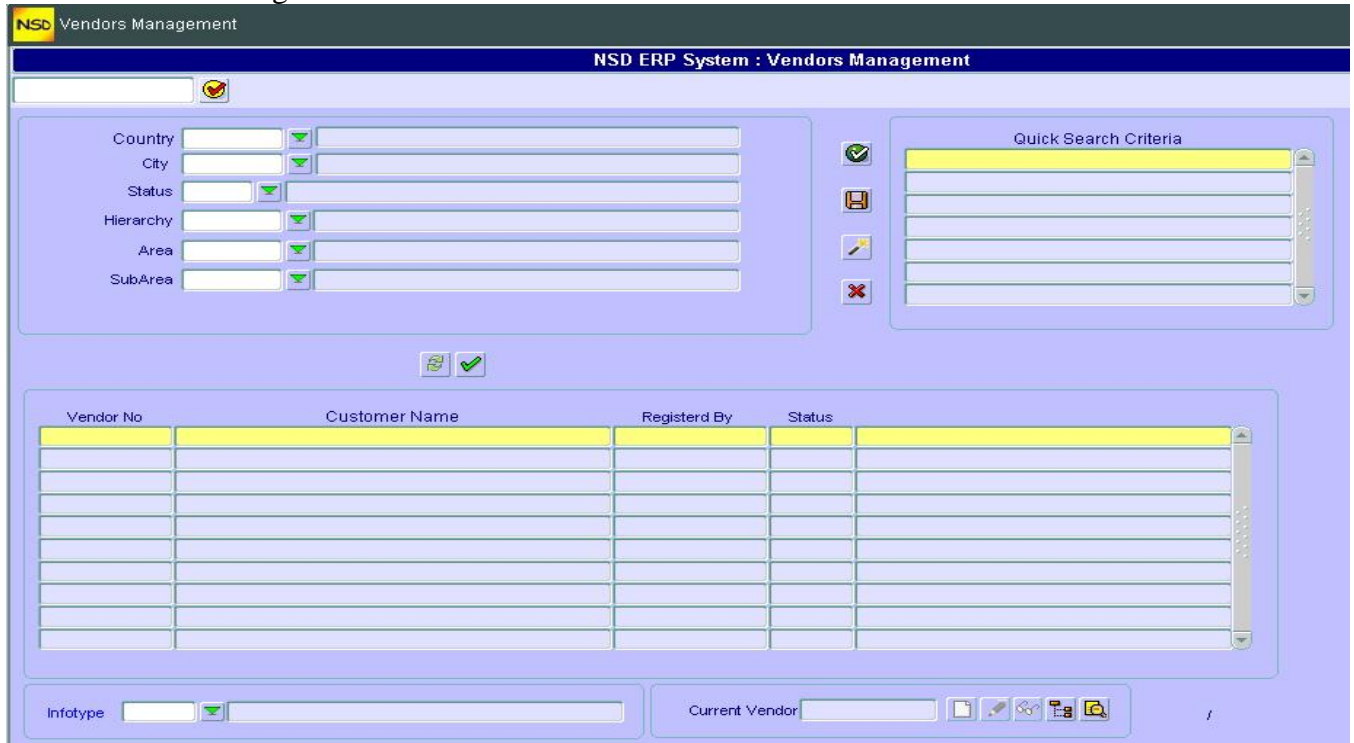
This functionality presents the same screen and procedure as in the "Maintain Vendor Data" with the only difference is that we CANNOT change any data.

Based on the left pan, we can tell if the vendor's infotype contains information (marked with ) or not (marked with ). Therefore you can display only the existing information.



Vendors Management




This functionality works exactly as the "Customer Management". It represents a cockpit from where we can search and manage Vendors data.



❖ **Creating Search criteria:**





You can create one or many search criteria and save them for later use. You can for example create one search criteria for ALL your Vendors, another search for all Vendors in GCC and another one for all BLOCKED Vendors etc...

This is how you do it:

1. First enter the search criteria by choosing and filling the fields needed. Examples:
 - To search for all **Active** Vendors, fill in ONLY the status field by choosing through the drop down menu "Active" and leave all other fields blank.
 - To search for all Vendors in GCC countries, fill in only the "Area" field and leave the rest blank.
2. Once you search criteria are filled in, click execute . You will have a list of Vendors.
3. To SAVE this search criteria, click . A pop up window appears to ask you about the name you want to give to the search.
4. Type the name (description) of the search criteria and hit 


❖ **Updating (changing) a Search Criteria:**

You can change an ALREADY SAVED search criteria by:

1. Click on 
2. A pop up window appears. Click on the green arrow to select the Search Criteria from the drop down menu
3. Click 
4. Fill in the desired search fields and click 
5. Once satisfied with the search criteria, click on  to update your Search Criteria




❖ **Deleting Search Criteria:**

You can delete already saved Search Criteria from the list by:

1. Clicking on the name of the Search Criteria you want to delete
2. Click on 



❖ Maintaining Vendor Data:

You can **maintain Vendor data directly** right from this screen as follows:

1. Click on your Vendor in the Vendors list (choose the Vendor)
2. Here you have the option either:
 - Maintain data through the infotypes (screens) by choosing them through the drop down infotypes menu and then performing the change (click on ) or create  or
 - Click on  which will take you to “Maintain Vendor Data” tree screen

❖ Displaying Vendor Data:

You can **display Vendor data directly** right from this screen as follows:

1. Click on your Vendor in the Vendors list (choose the Vendor)
2. Here you have the option either:
 - Display data through the infotypes (screens) by choosing them through the drop down infotypes menu and then clicking on  or
 - Click on  which will take you to “Display Vendor Data” tree screen.

C – UTILITIES



In this section you can create a Vendor rapidly (instead of doing it through an Action) and then later on, you can maintain the other data.

In addition, you can change the Vendor status or display the history for a Vendor status changes.

Quick Creation

To quickly create a Vendor

1. Double click on "Quick Creation"

2. Fill in the fields of "Account group" and "Hierarchy" for the Vendor.
3. Enter a description for the Vendor and fill in the rest of the fields as needed
4. You can add comments on the Vendor in the section "Remarks"
5. Save your entries 
6. Go back to the main screen by clicking on 

Vendor Status Management

You can change the status for a Vendor (black list him for example) by:

1. Double clicking on "Change Vendor Status"

Integrated Solution
System Technical Data Window

NSD Change Vendor Status

NSD ERP System : Change Vendor Status



Vendor: 10007 Testing

Current Status: 3 Black listed New Status: []

Reason: []

From	To	Reason	Date	User
1	Active	3 Black listed	01 No Reason	04/01/2009 ADMIN

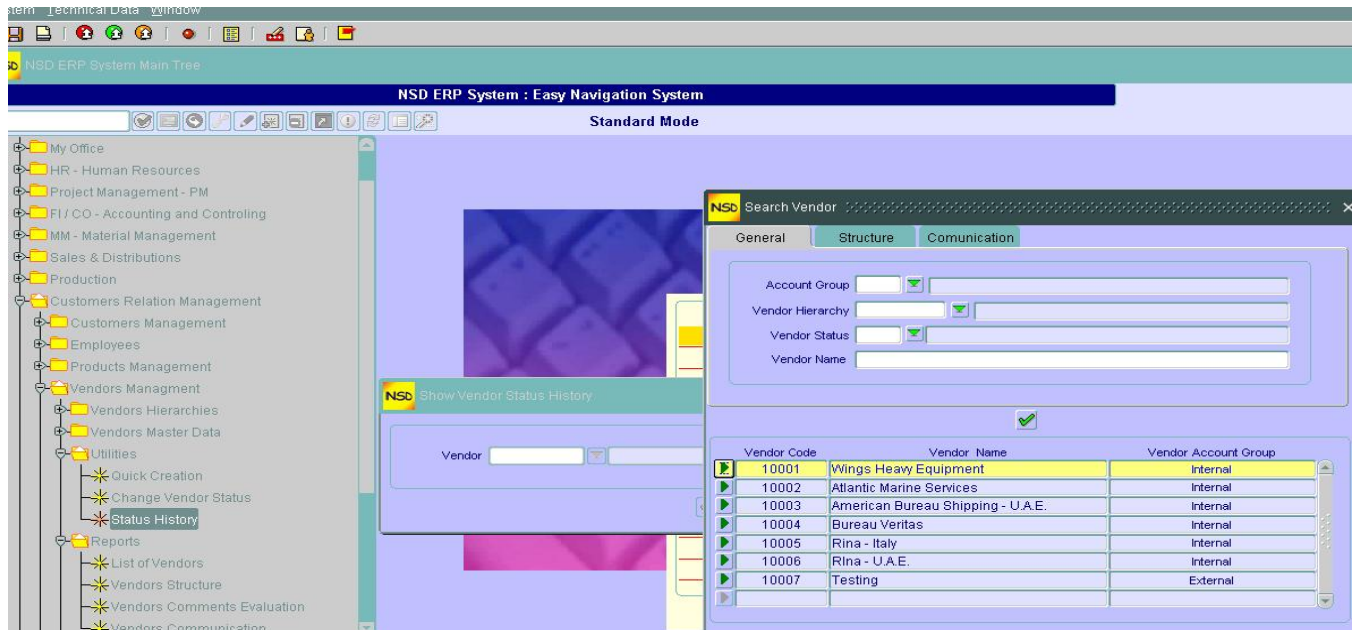
1 /

2. Choose the new status through the drop down menu "new Status"
3. Give a reason (this is for reporting purposes)
4. Click on execute . You will see the status change From - To
5. Save 

Status History

This functionality will display all the statuses the selected Vendor went through. Using this history, you will know **who** changed what for all Vendors. To get to this:

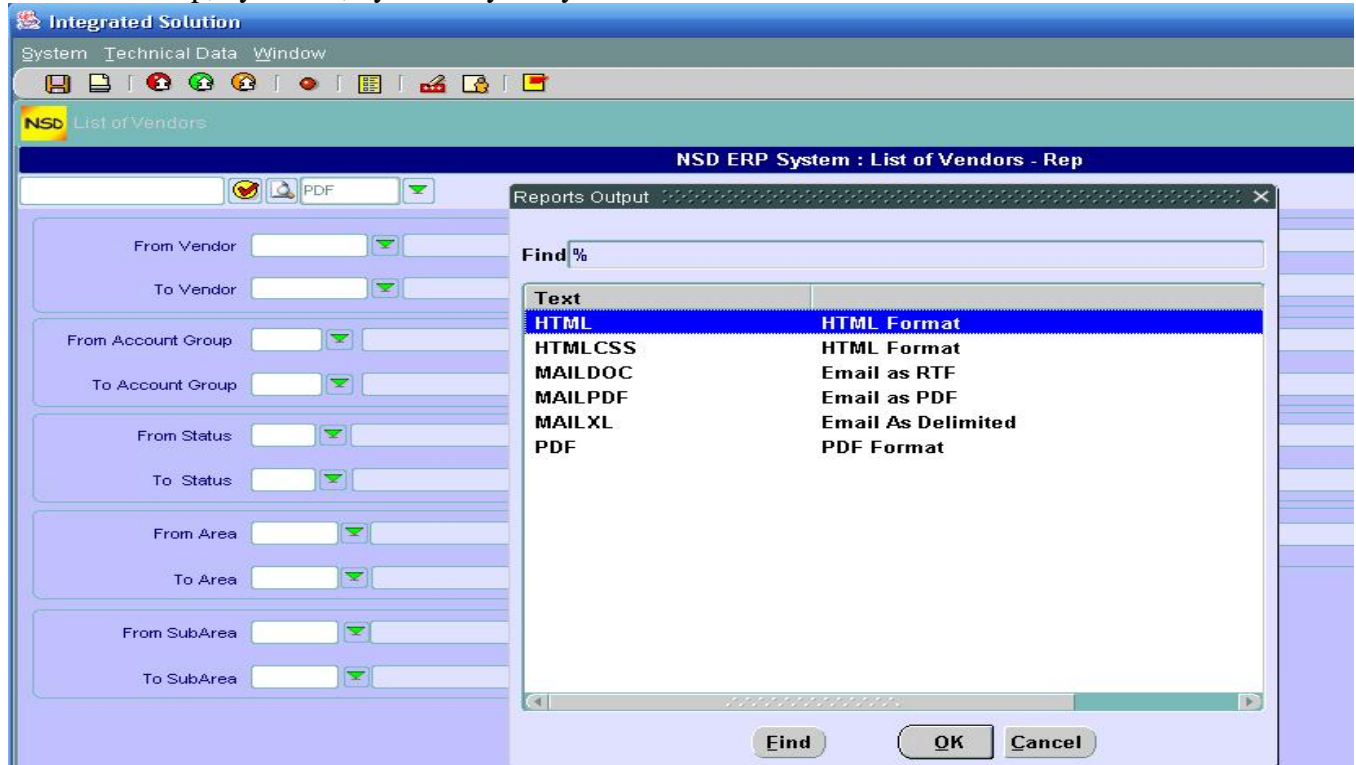
1. Double click the "Vendor Status Changing History" under "Products Management's Utilities"
2. Select the Vendor through the Drop down menu




D – REPORTS

List of Vendors

We can obtain a list of Vendors by specifying any or all of the Vendors, by Group or Sub-group, by Account Group, by Status, by Country or by Area or Sub-area.



1. Fill in the desired fields to list the Vendors
2. Choose the format you desire your report will use from the drop down menu as in the figure above
3. Click on Print Preview 

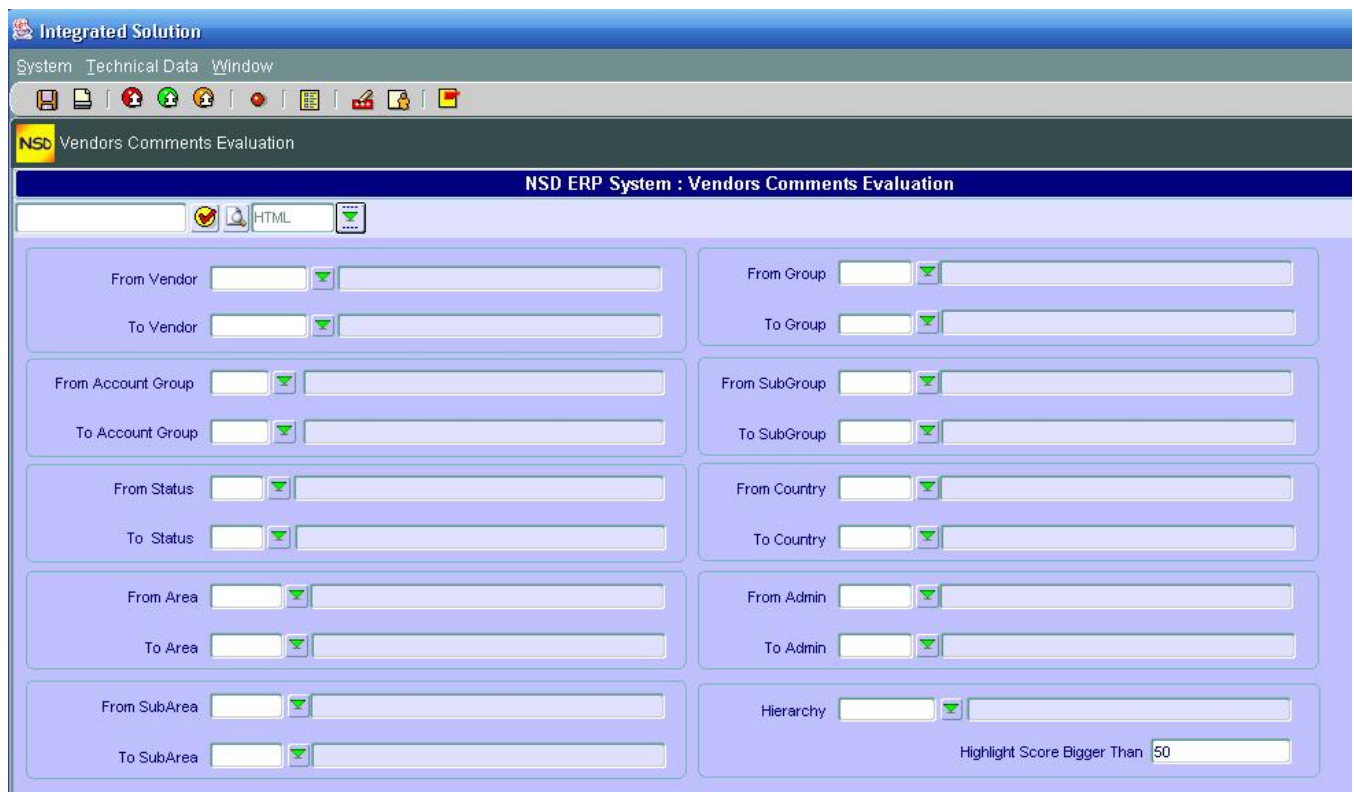
Notice that for this report, you get an output with vendor's code, name and country and status

Vendors Structure

This report uses the same screen as the one above (List of vendors). However, the output will have columns about vendor's code, name , group , subgroup , area and sub area.

Vendors Comments Evaluation

This report contains in addition to the "List of Vendors" report, the fields about the Administrator (who evaluates the Vendor) and the Score comparison. Therefore in this kind of report you can display the comments made by a given Admin or a set of Admins and also by giving a reference score.



The output of this report will contain information about the vendor's code, name and total evaluation score from comments on vendor infotype.

Vendors Communication

The output of this report will include vendor's code, name , tel , fax, web and email.

E – PURCHASE ORDER

Create Purchase Order

To create a PO, proceed as follow:

1. From "Vendor Management → Purchase Order", double click on "Create Purchase Order"

The screenshot shows the 'Create Purchase Order' window in the NSD ERP system. The window title is 'Integrated Solution' and the menu bar includes 'System', 'Technical Data', and 'Window'. The main area contains the following fields:

- Plant: 2000 (dropdown), Folk Energy L.L.C (text)
- Purchase Org: 3 (dropdown), Miscellaneous (text)
- Purchase Group: 3 (dropdown), Miscellaneous (text)
- Vendor No: 10005 (dropdown), Rina - Italy (text)
- PO Type: ST (dropdown), Standard Purchasing Order (text)
- PO Year: 2009 (text)
- PO Date: 04-JAN-2009 (text)

2. Fill in the fields and then click create

The screenshot shows a more detailed view of the 'Create Purchase Order' window. The title bar reads 'NSD ERP System : Create Purchase Order'. The main area includes the following fields and sections:

- Layout: [dropdown], PDF: [checkbox checked], With Head: [checkbox checked]
- Po Type: ST (dropdown), Standard Purchasing Order (text)
- Vendor No: 10005 (dropdown), Rina - Italy (text)
- Po Date: 04/01/2009 (text), Po No: 1 (text), Po Year: 2009 (text)
- Tabs: Delivery/Invoice, Vendor Reference, Head Text, Validity Date, Terms .Conditions
- Terms Of Pay: [dropdown], Vendor Currency: AED (dropdown), 1 (text), AED (text)
- Terms Of Delivery: [dropdown]
- Table with columns: Material No, Description, Storage.L, Quantity, Unit, Unit Price, SubTotal, Additional Cost, Total, Currency
- Item Text: [text area], Additional Costs: [checkbox checked]

3. Choose the Layout template from the drop down menu "Layout". (See the chapter on "Creating a Template for Quotation" if you need to create other templates)
4. Choose the format for your template (PDF, XML...)
5. Fill in the necessary fields for every Tab (Delivery Invoice, Vendor Reference, Head Text, Validity Date and Term Conditions)
6. If necessary Add additional costs in the Tab "Additional Costs" below the Material list.

NSD ERP System : Create Purchase Order

Layout PDF With Head

Po Type Standard Purchasing Order Vendor No Rina - Italy

Po Date Po No Po Year

Delivery/Invoice Vendor Reference Head Text Validity Date Terms Conditions


Terms Of Pay Vendor Currency

Terms Of Delivery

Material No	Description	Storage.L	Quantity	Unit	Unit Price	SubTotal	Additional Cost	Total	Currency

Item Text Additional Costs

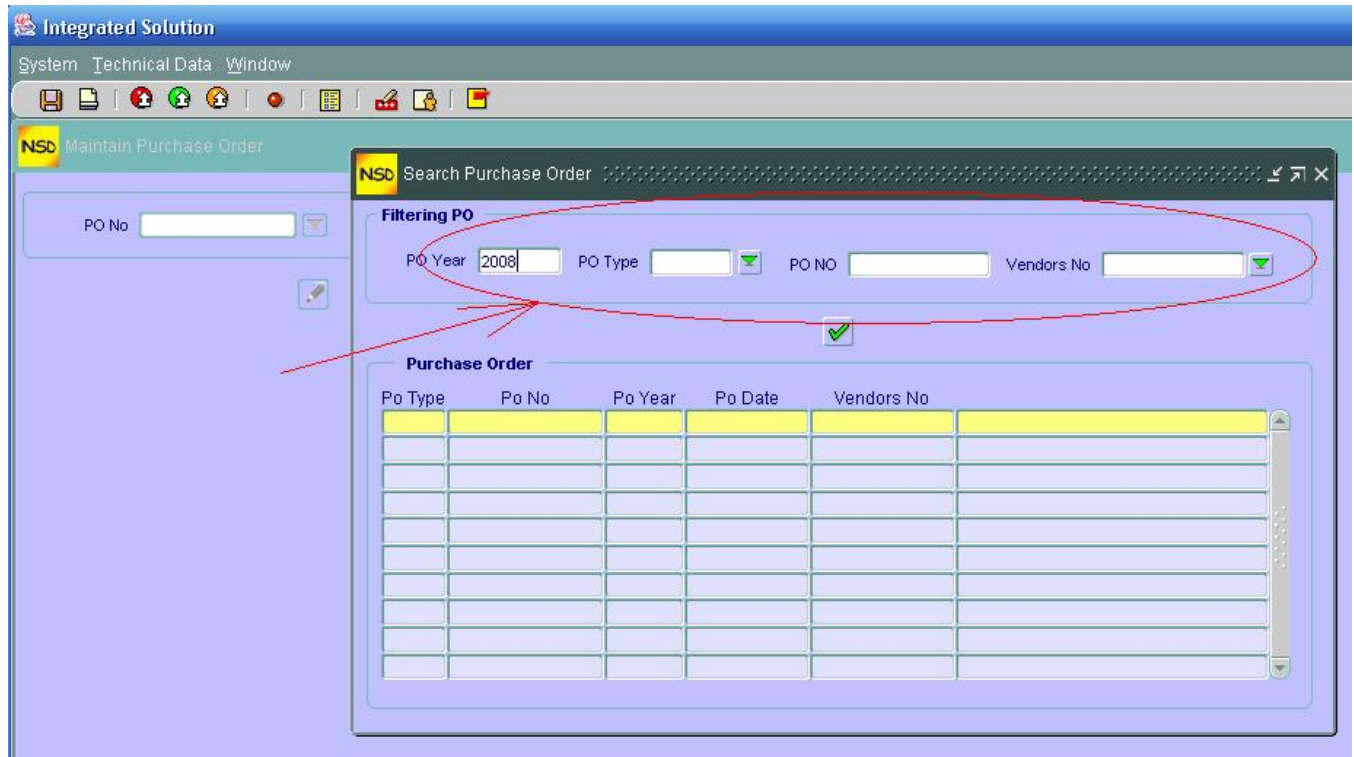
Code	Amount	Currency




7. Click Run Preview button  on top of the screen (besides the layout output format)

Maintain Purchase Order

This functionality will allow you to change or complete an already existing Purchase Order.



1. Double click on "Maintain Purchase Order"
2. Enter the PO number or search for it using the different filters shown in the following picture



3. Click execute 
4. Double click on the PO to be maintained from the PO list
5. Click on the change icon 
6. Fill or change the desired fields (do the same as in "Create PO")
7. Save 

Display Purchase Order

This functionality works exactly as the Maintain Purchase Order with the difference that here you

CANNOT change or update the data and hence the change icon  is replaced by the display icon 

SALES DOCUMENTS

A – SALES QUOTATIONS

Create Sales Quotation

To make a Sales Quotation proceed as follows:

1. From the CRM "Sales Documents → Sales Quotations" double click on "Create Sales Quotation"

System Technical Data Window

NSD Creation Of Price Quote

NSD ERP System : Price Quota

Layout PDF With Head Document 30011

Document Type UQ Urgent Quotation Number 30011

Quotation Date 04/01/2009

Sales Area 0000 00 00 Folk Shipping LLC-Folk Shipping-Bunker Sales

Quotation Valid From 04/01/2009 To

Sales Office 0000 Dubai Group 000 Bunker Sales

Credit Area FLK FOLK Shipping Credit Area

Delivery Plant 1000 Folk Shipping L.L.C.

Customer No 6 Alexandria Shipping L.L.C. Att To Email

Ship To 6 Alexandria Shipping L.L.C. Vessel IMO No

Agent Port Jedha Port Incoterms

Payment Terms Standard Terms of Payment Currency USD Rate 3.67 3.67 LC AED ETA 04/01/2009 ETD


Price Validity Pricing Date 04/01/2009 Remark Requested Date 04/01/2009

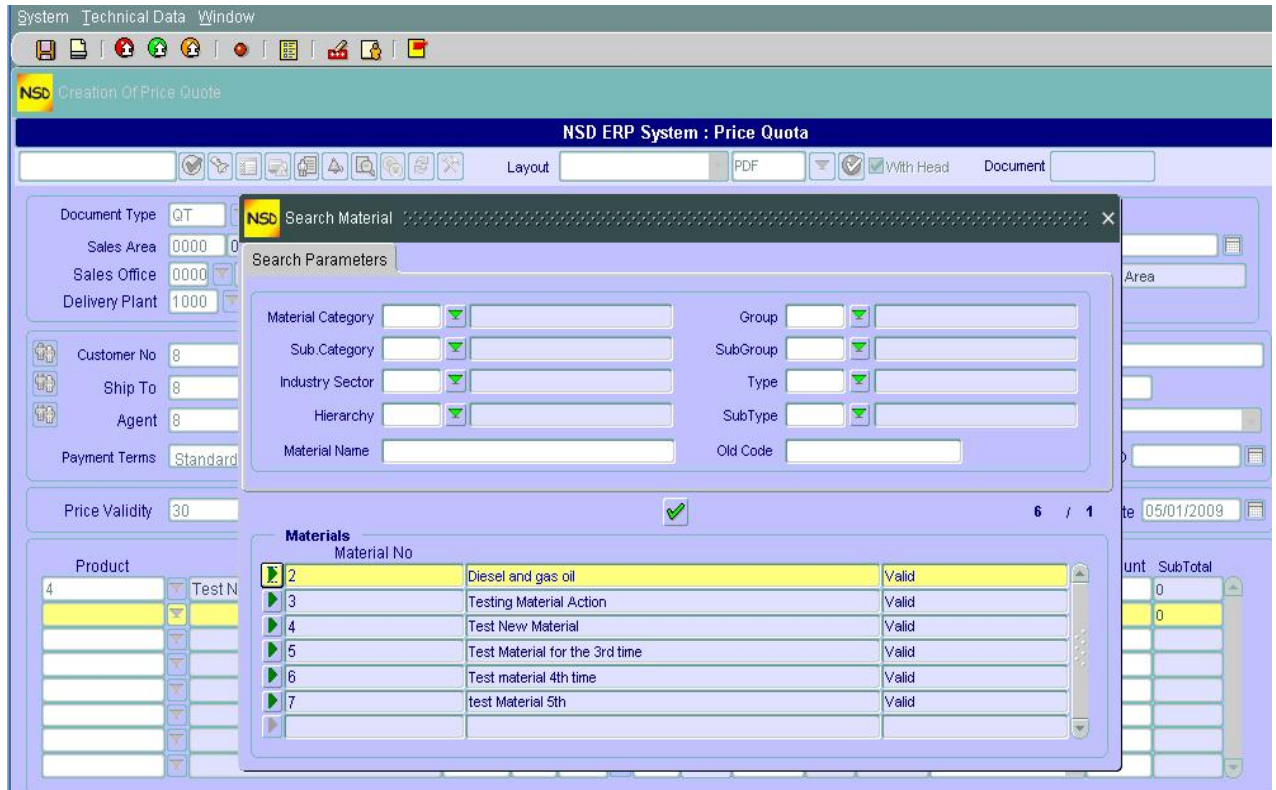
Product	Description	Quantity	Bonus	Unit	Rate	M.Unit	Amount	Currency	SubTotal	Additional Cost	Amount	SubTotal










Shipping Point Route Delivery Date Expected Date









Subtotal Add.Cost Total Quota USD

2. Enter "Document Type". A number is automatically assigned to the Sales Quotation
3. Fill in the rest of the Sales Organization fields and delivery plant
4. Dates for the Quotation and the Quotation validity are filled in automatically by default. You can change them by using the calendar icon
5. Fill in the shipping information. Remark you can search for recipients by clicking
6. To write a remark about the Quotation, click in front of field "Remark". The editor opens and you can start writing your remark. Click "Ok" when finished.

7. Enter the product by using the drop down menu. Some values are defaulted. You can change them by overwriting them. Fill in the rest of the information.
Note: When the pop up window opens to search for Material, you can either enter some specific search criteria to narrow the search or click  to list **all** materials.



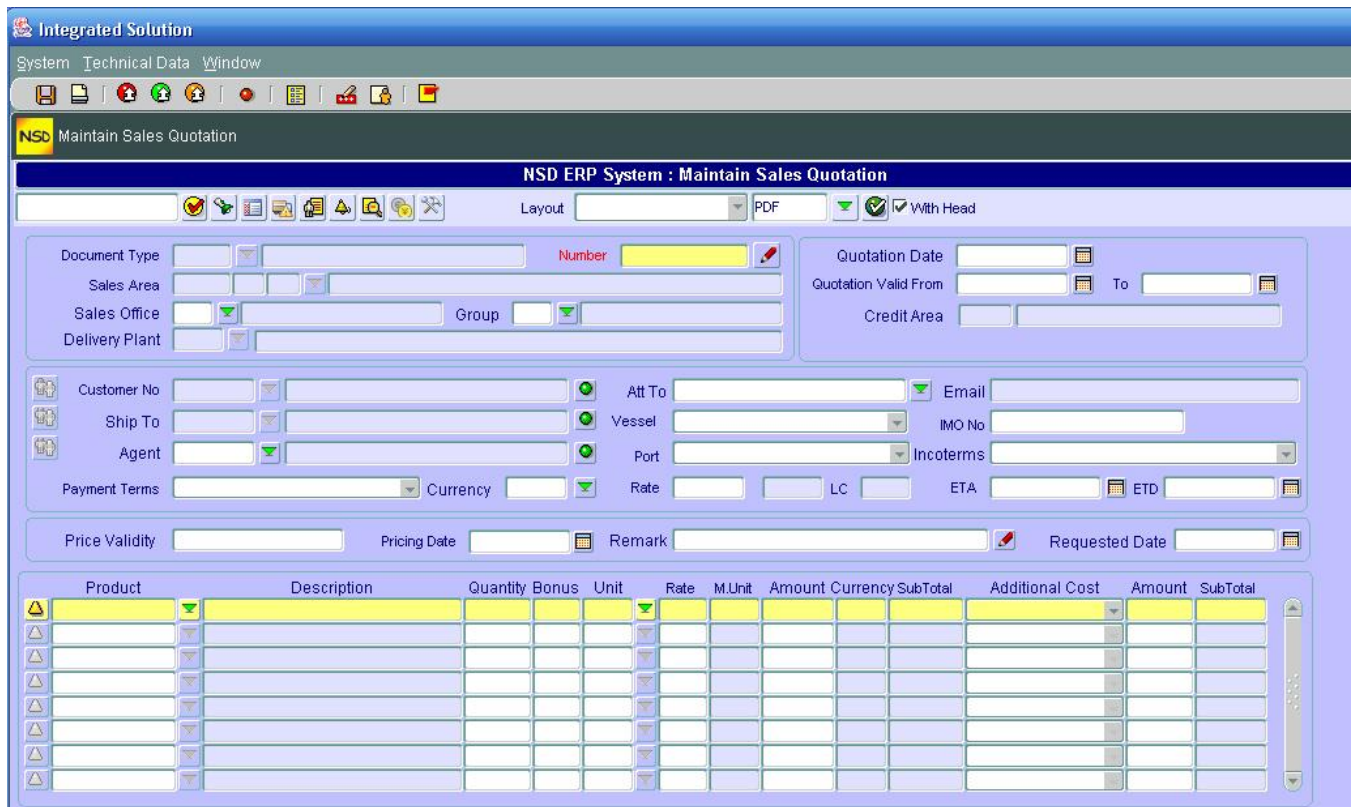
8. To **add** another product click 
9. To **delete** a product select the product line and click 
10. At any time you can select a product (click on it) and lick on the following icons at the bottom let of the screen to:
- * see information about a product (material) click 
 - * see material sales information, click 
 - * see notes about a material, click 
 - * see the material picture, click 
 - * see all deadline (due) dates about a material, click 
11. You can also maintain or display directly from this screen by clicking on the following icons on the top left of the screen:
- Show Quotation history, click 
 - Show Quotation Conditions, click 

- Show Shipping Modes, click 
 - Show Customer Pricing, click 
 - Show all credits used by the customer from his quota in all sales organization with details, click 
 - Show the credit granted for the customer in all sales organization, click 
 - Show the exchange rates used, click 
12. Choose the layout that you want to use for the Quotation through the "Layout" drop down menu or edit it by clicking 
13. Run preview by clicking 
14. Save . Note that if you save BEFORE you run preview, the Quotation will be closed and you have to preview it in "Maintain Quotation"


Maintain Quotation Data

To add or change data in an ALREADY saved Quotation, proceed as follows:

1. From the CRM "Sales Documents → Sales Quotations" double click on "Maintain Quotation Data"




The screenshot shows the 'Maintain Sales Quotation' window in the NSD ERP System. The window has a title bar 'Integrated Solution' and a menu bar 'System Technical Data Window'. The main title is 'NSD ERP System : Maintain Sales Quotation'. The interface includes various input fields for document details, customer information, and a data table for products.


Document Type: Number: 

Sales Area:



Sales Office: Group:


Delivery Plant:



Quotation Date: 





Quotation Valid From: To: 




Credit Area:








Customer No:  Att To:  Email:



Ship To:  Vessel:

Agent:  Port:  IMO No:

Payment Terms: Currency:  Rate: LC:  ETA:  ETD: 

Price Validity: Pricing Date:  Remark:  Requested Date: 

Product	Description	Quantity	Bonus	Unit	Rate	M.Unit	Amount	Currency	SubTotal	Additional Cost	Amount	SubTotal
												
												
												
												
												
												
												

- Click on  in front of "Number" to search for the Quotation.
- A search screen pops up. Fill in the desired parameters to filter the quotations or click  to list ALL quotations.



NSD ERP System : Maintain Sales Quotation

Search Sales Documents



Sales Org: [] Document Type: []
 D.Channels: [] Customer: []
 Division: [] Ship To: []
 Doc.Category: B Quotation Quotations Status: Pending

Type	Number	Currency	Customer No	Valid From	Valid To	Request Date
QT	10058	AED	8 NSD	05-JAN-2009		05-JAN-2009
UQ	30010	USD	2 Zakher Marine	08-OCT-2008	01-JAN-2009	08-OCT-2008

Reject Material Closed Subtotal Add.Cost Total Quota

- From the list of Quotations obtained, click on  in front of the quotation you want to maintain
- Proceed as in steps 3 to 14 in "Create Sales Quotation" to add or change data.

Display Sales Quotation

To display an ALREADY SAVED Sales Quotation, Proceed as in steps 1 to 4 in "Maintain Quotation Data" with the exception this time that you have a display icon  instead of .

Reject Sales Quotation

By discarding or closing for any reason a whole quotation or just some materials in the quotation and hence change the status to closed, we use this functionality.

1. Start by double clicking "Reject Sales Quotation" from the CRM ""Sales Documents → Sales Quotations"

Integrated Solution
System Technical Data Window

NSD Reject Materials From Sales Document

NSD ERP System : Reject Sales Quotation Materials

Doc.NO 10058 Number

Customer 8 NSD

Type QT Quotation



Sales Area 0000 00 00 Folk Shipping LLC/Folk Shipping/Bunker Sales

2 / 2

Material No	Material Text	Quantity	Unit	Amount	Currency	Reason
4	Test New Material	0	PIECE	0	AED	0003 Poor Quality
5	Test Material for the 3rd time	0	PIECE	0	AED	0004 Too Expensive

Report Formatting

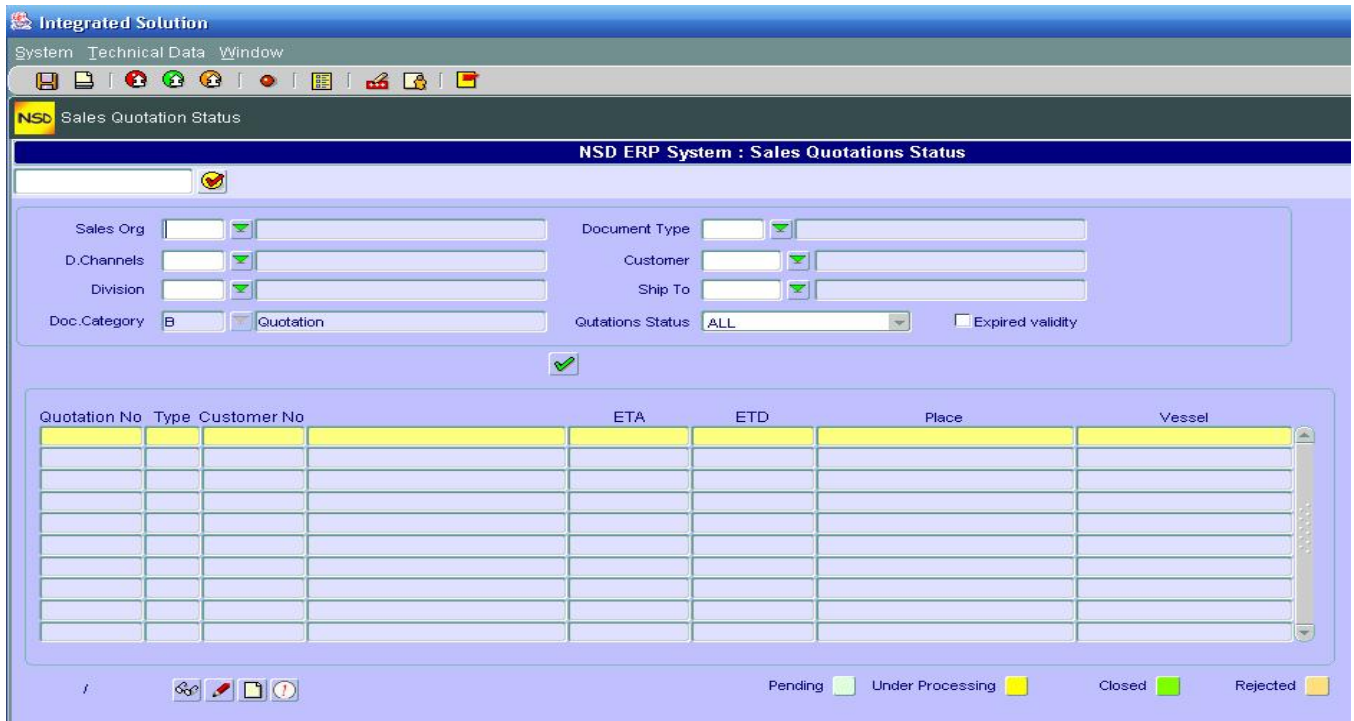
Reject Reason 0004 Too Expensive Replace existing Reject Reasons


2. Click  to search for the quotation
3. Proceed as in steps 3 and 4 in "Maintain Sales Quotation" to list and select the desired quotation
4. Here you have 2 options: either you reject some given material(s) or you reject the whole Quotation:
 - To reject materials one by one, select a material by clicking on the line it contains and select the reason through the drop down menu. If you leave the reason blank, it will be filled by the reason given to the whole Quotation at the bottom of the screen
 - To reject the whole Quotation, select the reason at the bottom of the screen, then tick "Replace Existing Reject Reasons" and click execute 
5. This will give status "Closed" to the material or the quotation

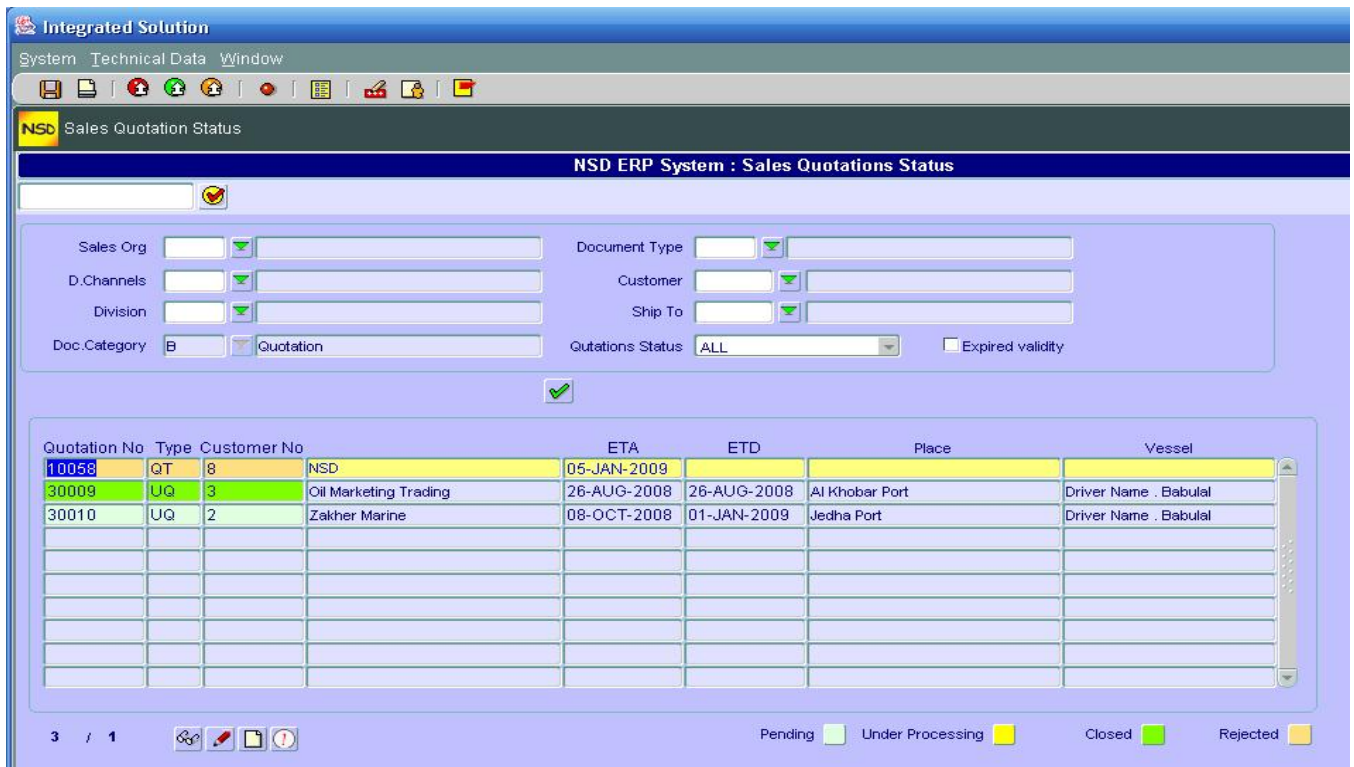
Sales Quotation Management





This represents the cockpit of the Sales Quotation. From here you can manage (Create, Maintain or Display) a Sales Quotation.

1. From the CRM "Sales Documents → Sales Quotations" double click on "Sales Quotation Management"



- You can either filter your quotations by entering different parameters or click  to have a list of ALL your quotations



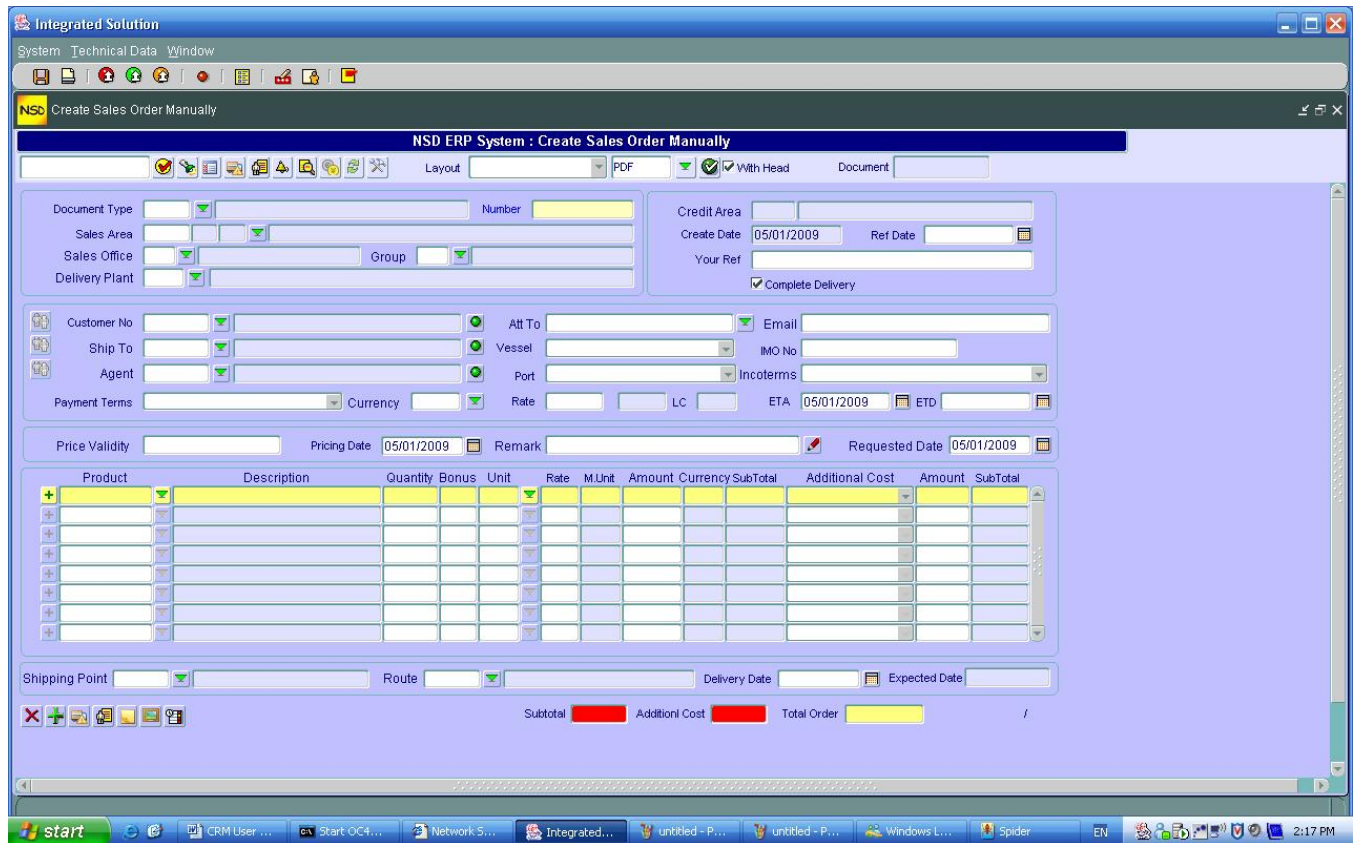
3. The Quotations are listed with colors. Please refer to color meanings at the bottom right of the screen.
4. Click the line containing the Quotation you want to use.
5. From the bottom left side of the screen:
 - Click on  to Display the Quotation or
 - Click on  to Maintain the Quotation or
 - Click on  to Create a new Quotation or
 - Click on  to Reject sales Quotation or a Material in a Quotation.

B – SALES ORDERS

Create Sales Order Manually

This functionality is normally used when NO Quotation has been made or we don't want to refer to a Sale Quotation.

1. From the CRM "Sales Documents → Sales Orders", double click on "Create Sales Order Manually"



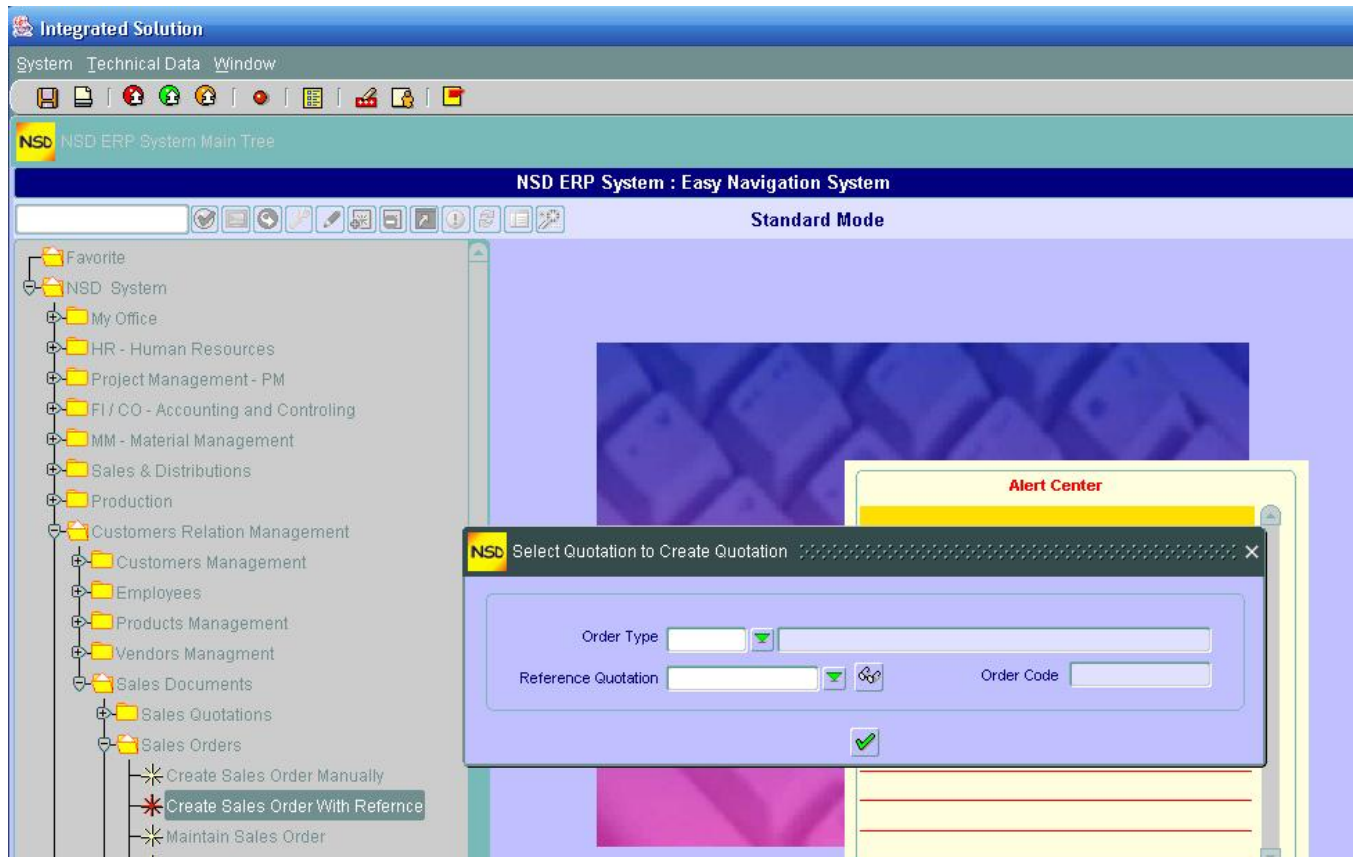
The screenshot shows the 'Create Sales Order Manually' window in the NSD ERP System. The window title is 'NSD ERP System : Create Sales Order Manually'. The interface includes a toolbar with icons for layout, PDF, and document operations. The main area contains several input fields for document details (Document Type, Sales Area, Sales Office, Delivery Plant, Number), customer information (Customer No, Ship To, Agent, Payment Terms, Currency, Rate, LC, ETA, ETD), and shipping details (Shipping Point, Route, Delivery Date, Expected Date). A table with columns for Product, Description, Quantity, Bonus, Unit, Rate, M.Unit, Amount, Currency, SubTotal, Additional Cost, Amount, and SubTotal is visible. At the bottom, there are summary fields for Subtotal, Additional Cost, and Total Order.


2. You will notice that this screen is the SAME screen as the one used to create a Sales Quotation. So proceed as in steps 2 to 14 in "Create Sales Quotations"

Create Sales Order with Reference

This functionality will allow you to create a Sales Order from a Quotation. That will save you time from entering all data that you normally do when you create a sales order manually.

1. From the CRM "Sales Documents → Sales Orders", double click on "Create Sales Order With Reference"



2. Select the Order Type through the drop down menu
3. Select the Reference Quotation through the drop down menu
4. Click execute 

NSD Create Sales Order With reference to quotation

NSD ERP System : Create Sales Order With Ref

Layout PDF With Head Document

Document Type BV Cash Sales Number 40006
 Sales Area 0000 00 00 Folk Shipping LLC-Folk Shipping-Bunker Sales
 Sales Office 0000 Dubai Group 000 Bunker Sales
 Delivery Plant 1000 Folk Shipping L.L.C

Credit Area FLK FOLK Shipping Credit Area
 Create Date 05/01/2009 Ref Date
 Your Ref
 Complete Delivery

Customer No 2 Zakher Marine Att To JOMAA Email Jomaa@MYNSD.INFO
 Ship To 3 Oil Marketing Trading Vessel Driver Name . Babulal IMO No Truck no. 92852
 Agent 2 Zakher Marine Port Jedha Port Incoterms Cost & Freight

Payment Terms Payable within 90 days of do... Currency USD Rate 3.67 3.67 LC AED ETA 08/10/2008 ETD 01/01/2009

Price Validity 000 Pricing Date 08/10/2008 Remark 000 Requested Date 08/10/2008

Product	Description	Quantity	Bonus	Unit	Rate	M.Unit	Amount	Currency	SubTotal	Additional Cost	Amount	SubTotal
+	2 Diesel and gas oil	1000		IGAL	1	IGAL	100	USD	100000		0	0
+								USD	0		0	0
+												
+												
+												
+												
+												

Shipping Point 00000 Folk Dubai Shipping Point Route 000001 General Shipping Route Delivery Date 08/10/2008 Expected Date 17/09/2008

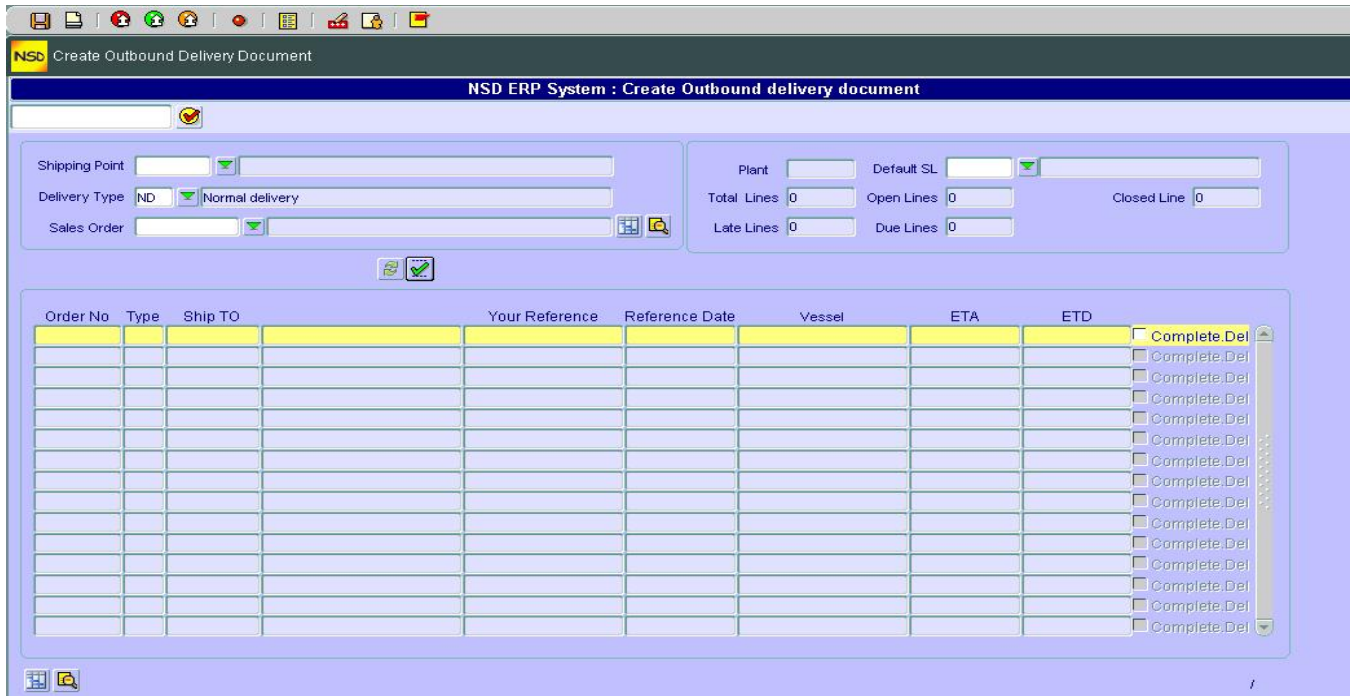
Subtotal 100000 Add.Cost 0 Total Order 100000 USD / 1


5. Make any changes you want (refer to "Create Sales Quotations" explanations).
6. Proceed as in steps 12 to 14 in "Create Sales Quotations"

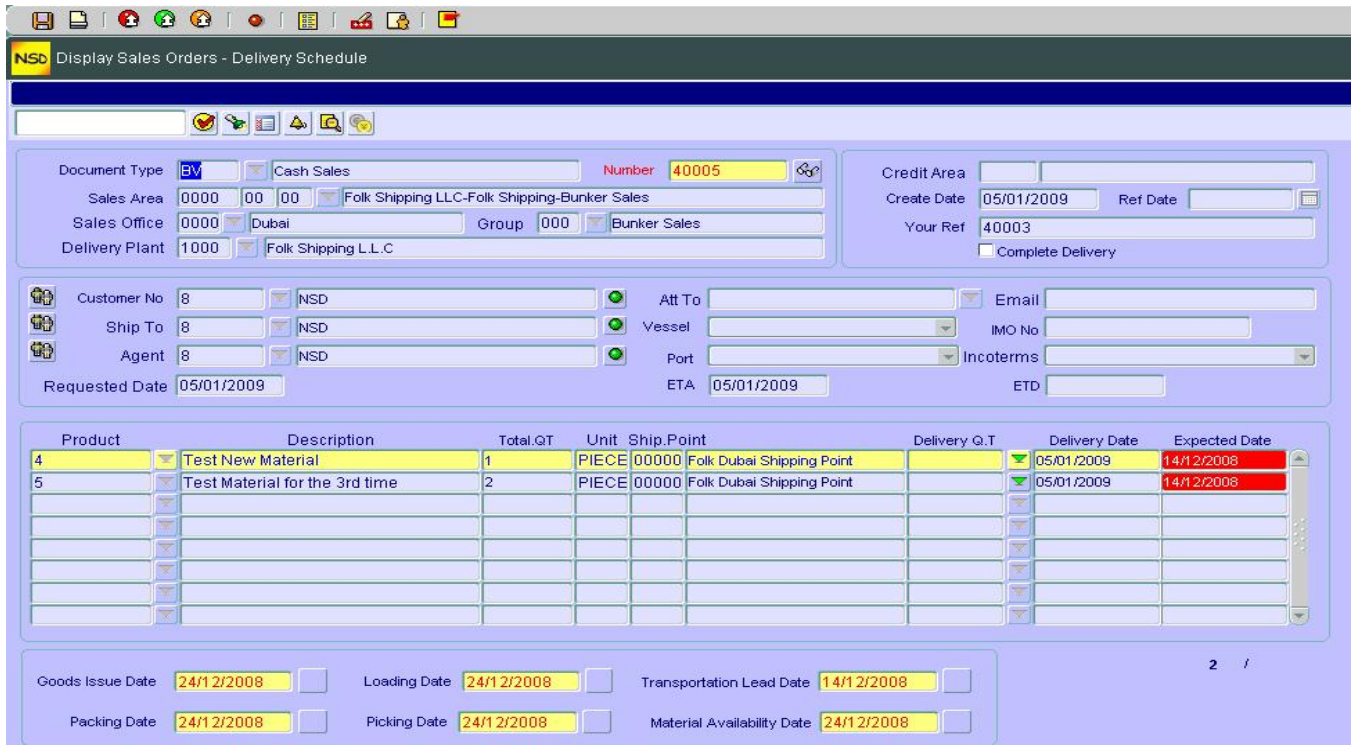
Maintain Sales Order



Here you can add or change data in an already saved Sales Order.

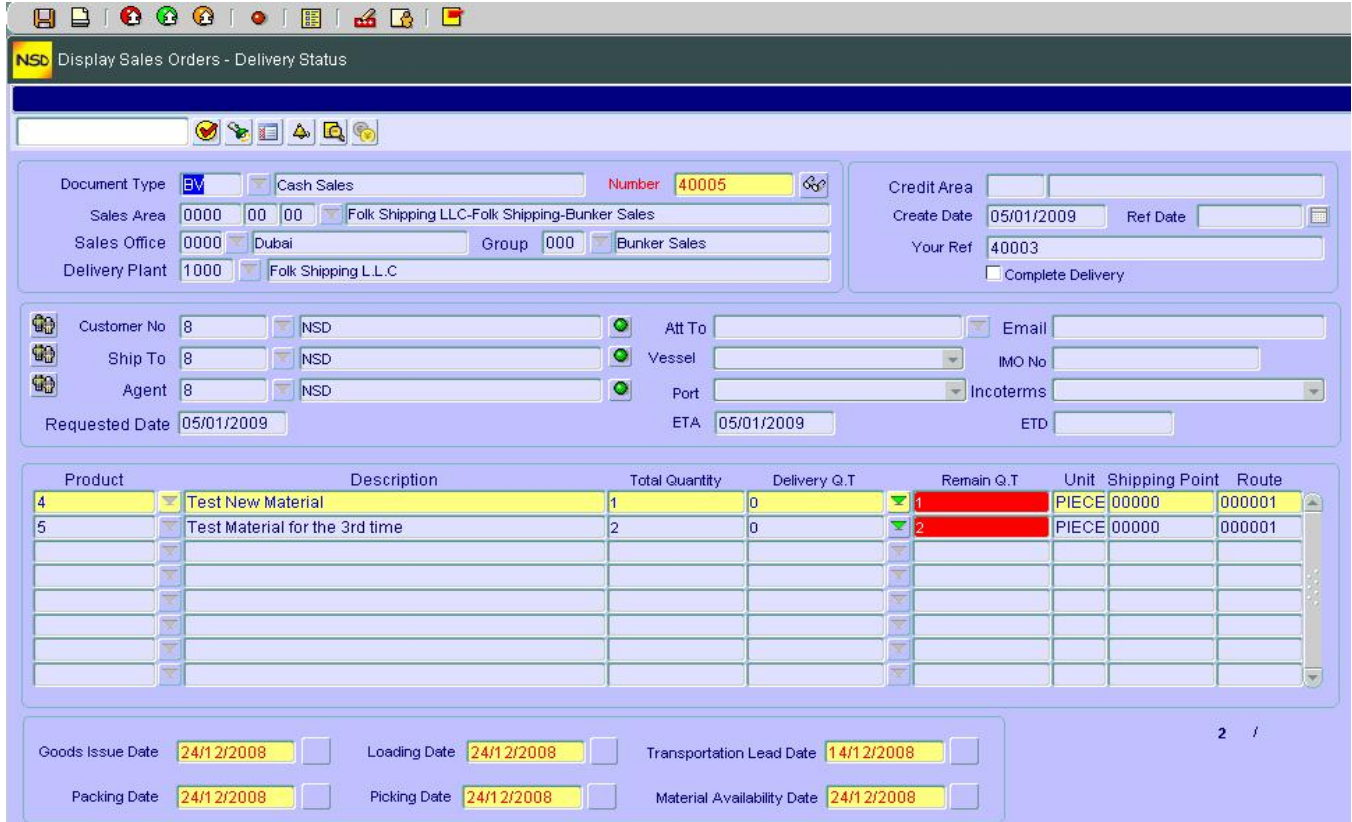
1. From the CRM "Sales Documents → Sales Orders", double click on "Maintain Sales Order"



2. Select the Shipping Point from the drop down menu
3. Select the Sales Order from the drop down menu
4. If you want to see the delivery schedule, click . You will get something like



5. Click  to go back to the initial screen "Create Sales Order Delivery"
6. If you want to see the Sales Order Delivery Status, click . You will get something like



NSD Display Sales Orders - Delivery Status

Document Type: BV Cash Sales Number: 40005

Sales Area: 0000 00 00 Folk Shipping LLC-Folk Shipping-Bunker Sales

Sales Office: 0000 Dubai Group: 000 Bunker Sales

Delivery Plant: 1000 Folk Shipping L.L.C

Credit Area: Create Date: 05/01/2009 Ref Date: Your Ref: 40003 Complete Delivery:



Customer No: 8 NSD Att To: Vessel: IMO No: Ship To: 8 NSD Port: Incoterms: Agent: 8 NSD Requested Date: 05/01/2009 ETA: 05/01/2009 ETD:

Product	Description	Total Quantity	Delivery Q.T	Remain Q.T	Unit	Shipping Point	Route
4	Test New Material	1	0	1	PIECE	00000	000001
5	Test Material for the 3rd time	2	0	2	PIECE	00000	000001

Goods Issue Date: 24/12/2008 Loading Date: 24/12/2008 Transportation Lead Date: 14/12/2008

Packing Date: 24/12/2008 Picking Date: 24/12/2008 Material Availability Date: 24/12/2008

2 /

7. Click  to go back to the initial screen "Create Sales Order Delivery"
8. Click  to start creating the SO Delivery. You will get something like

Integrated Solution
System Technical Data Window

NSD Create Outbound Delivery Document

NSD ERP System : Create Outbound delivery document



Shipping Point 00000 Folk Dubai Shipping Point
Shipping Office 0001 Standard Shipping Office
Customer 8 NSD
Ship To 8 NSD
Port
Sh.Condition

Delivery Number 6
Delivery Type ND Normal delivery
Vessel
IMO No
Incoterms
ETA 05/01/2009 ETD

Created By ADMIN
Create date 05-JAN-2009
S.Order Ref 40005
Delivery On
Trans Zone 0000000001

Material No	Material Text	Delivery Qt	Unit	Picking	Packing	Loading	Issue	Delivery date	Order Ref	SL	Route
4	Test New Material	1	PIECE					05/01/2009	40005	1000	Plant1 000001
5	Test Material for the 3rd time	2	PIECE					05/01/2009	40005	1000	Plant1 000001

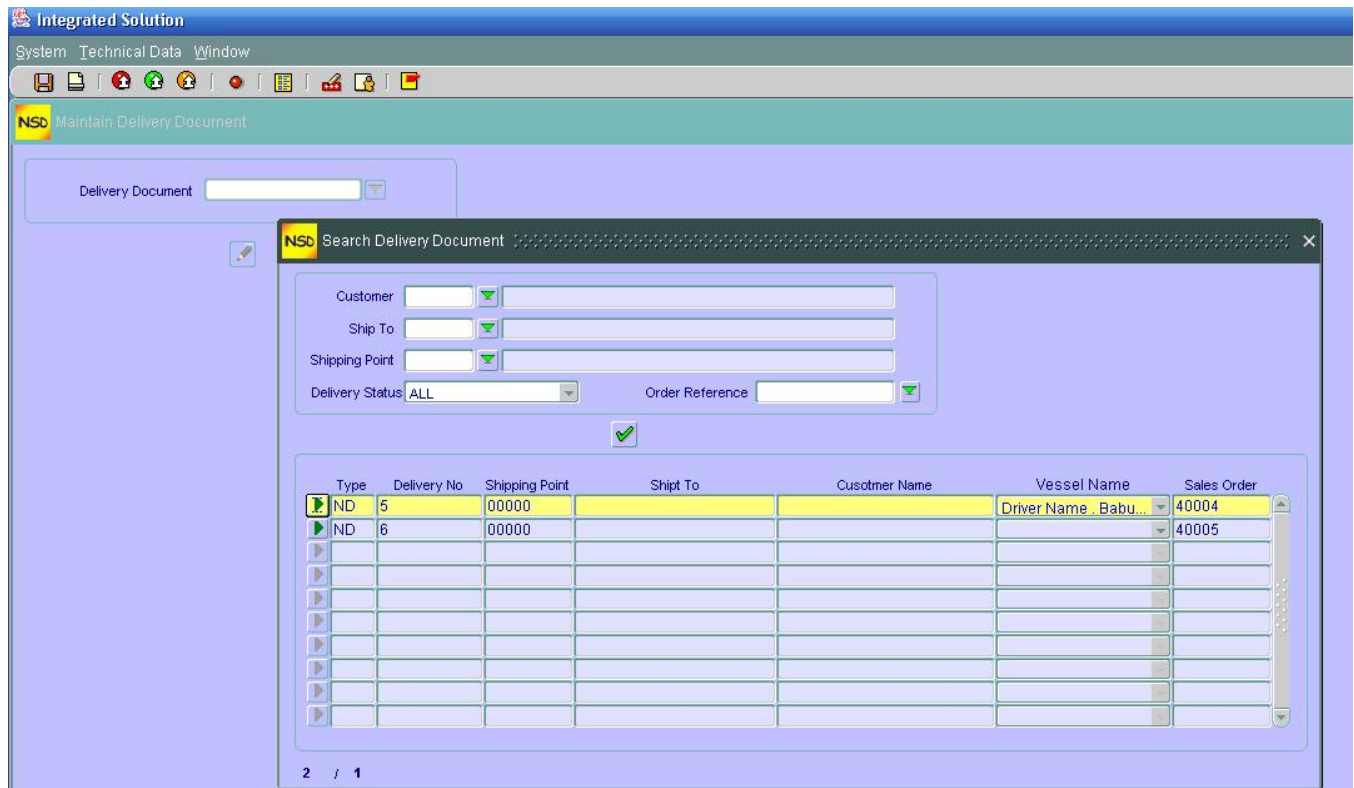
Material Availability 24/12/2008 Picking 24/12/2008 Packing 24/12/2008 Loading 24/12/2008 Issue 24/12/2008 Route Desc. General Shipping Route
Plant 1000 Folk Shipping L.L.C




9. Fill in the "Delivery on" date
10. For each material verify the quantity delivered, picked, packed loaded, issued, the Storage Location (SL) and the Route
11. You can delete a material from the Delivery Document by selecting the material line and clicking 
12. Save your entries by clicking 

Maintain Delivery Document

This functionality like any other maintenance functionality will allow to edit (add or change) an already saved Delivery Document.



1. From the CRM "Sales Documents → Shipping and Transportation", double click on "Maintain Delivery Document"



2. Select the Delivery Document through the drop down menu and search screen
3. From the list of Delivery Documents obtained, click on  in front of the document you want to maintain
4. Click 
5. Make any changes you want to the Delivery date or to material parameters
6. Save your entries 

Display Delivery Document

This functionality works the same as the "Maintain Delivery Document" with the exception that you cannot change or add any data.

1. From the CRM "Sales Documents → Shipping and Transportation", double click on "Display Delivery Document"
2. Proceed as in steps 2 and 3 in "Maintain Delivery Document"
3. Click 
4. To display another delivery document, click  and proceed as in steps 2 and 3 above.

Delivery List – by Material

This functionality allows you to make a list of deliveries by using different filters which are:

Delivery List – by Order

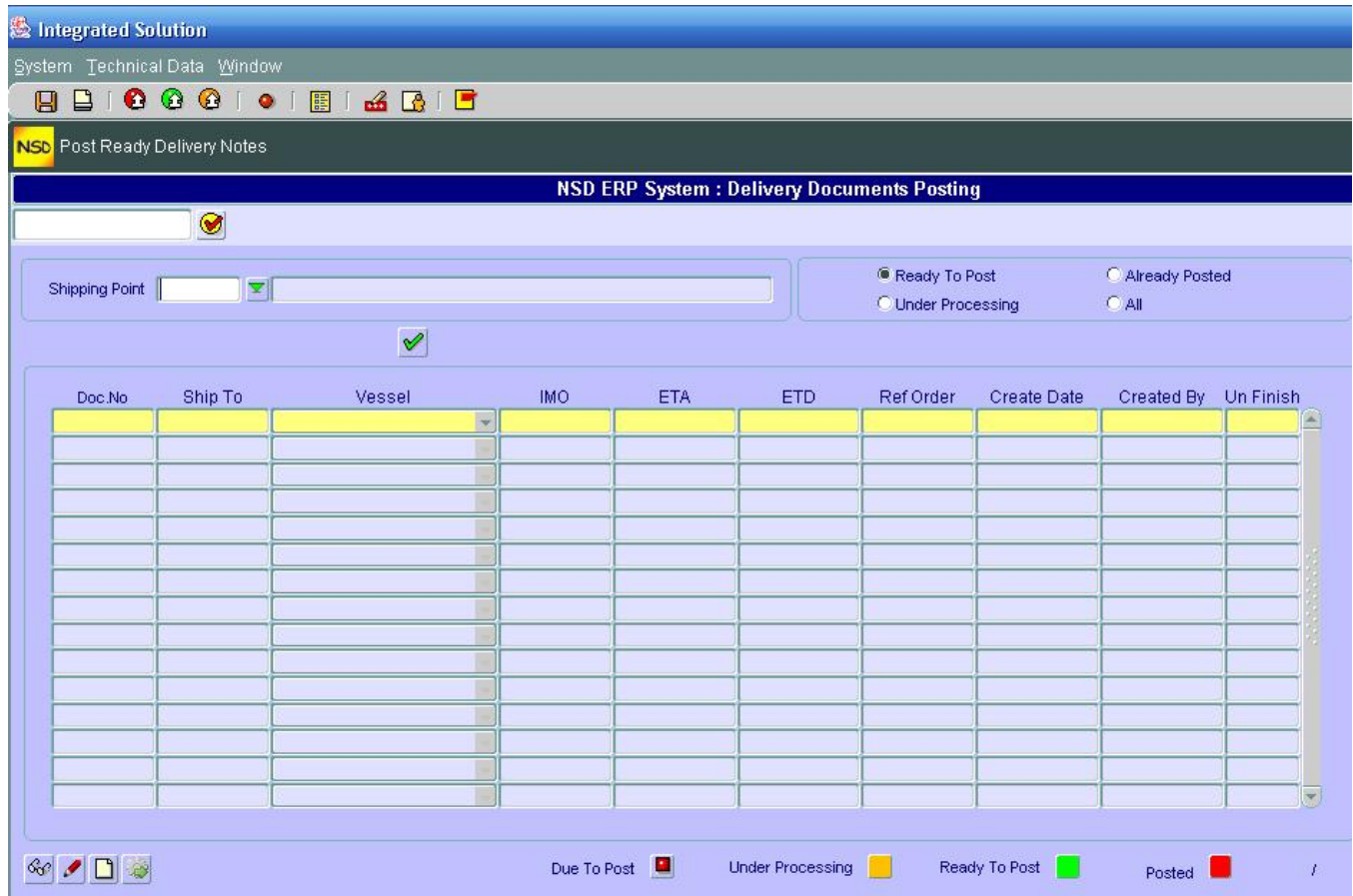
1. From the CRM "Sales Documents → Shipping and Transportation", double click on "Delivery List- by Order"






2. Enter the Shipping Point through the drop down menu
3. Click
4. Select the line containing an Order. You can either Display or maintain a Sales order:
5. Click to Display the Sales Order or
6. Click to maintain a Sales Order

Delivery Document Posting

This is the last step in a Sales Order process. After the Delivery Document has been made, we are ready to post it so to close the Sales Order and then the system will follow to Finance if available.

1. From the CRM "Sales Documents → Shipping and Transportation", double click on "Delivery List- by Order"



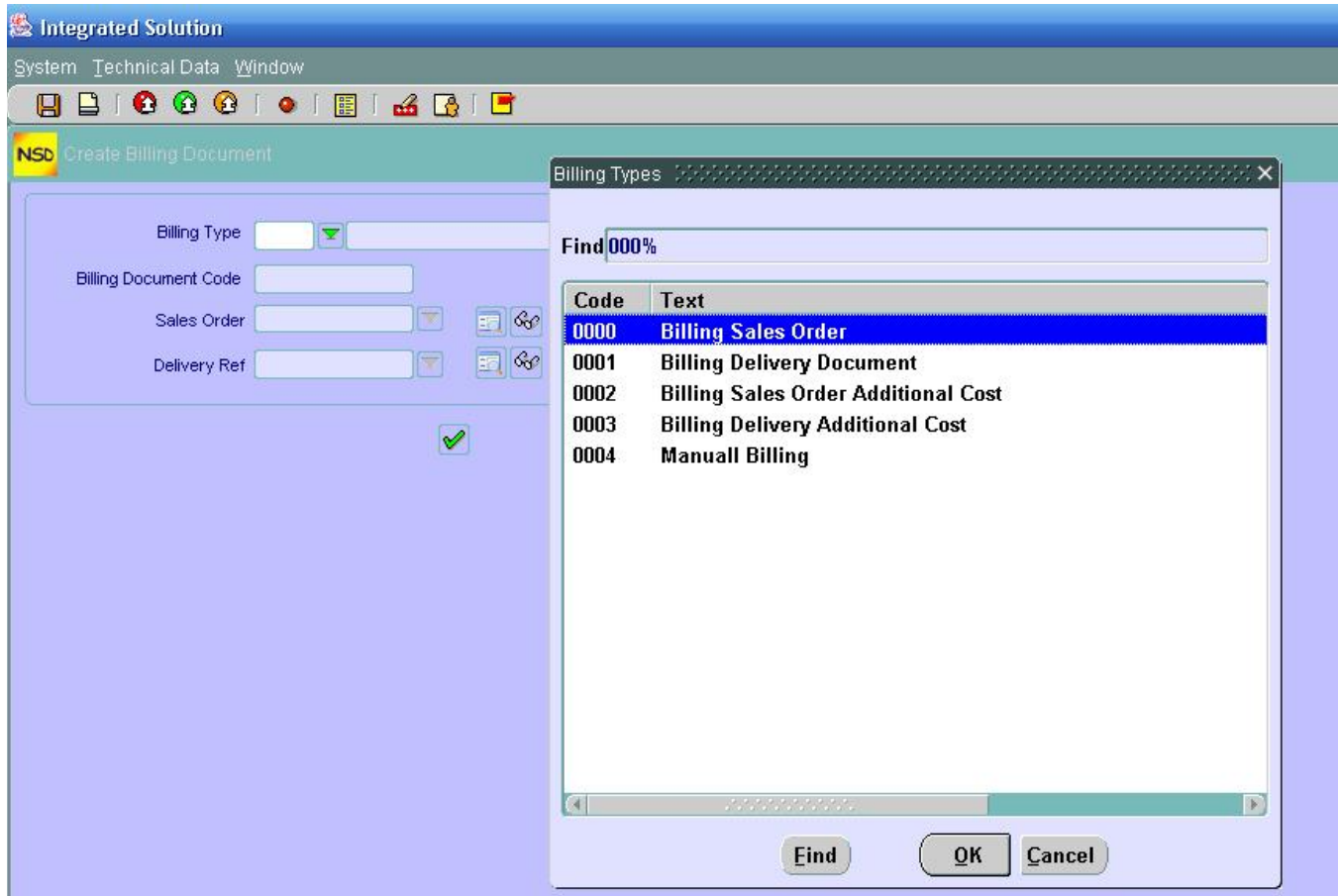
2. Enter the Shipping Point through the drop down menu
3. You can list the Delivery documents available by:
 - Ready to post (delivery documents finished)
 - Already posted (this is just to display the Sales orders closed)
 - Under Processing (documents not finished), or
 - All documents available
4. Click 
5. Select a document by clicking on the line it contains
6. You can choose either to:
 - Post the selected document by clicking on 
 - Display the selected document by clicking on 
 - Maintain the selected document by clicking on  or
 - Create right from this screen a Delivery Document by clicking on  and follow the procedure described in "Create Delivery Document"



Notice the color codes in front of each Delivery document line and their meaning explained in the bottom of the screen.

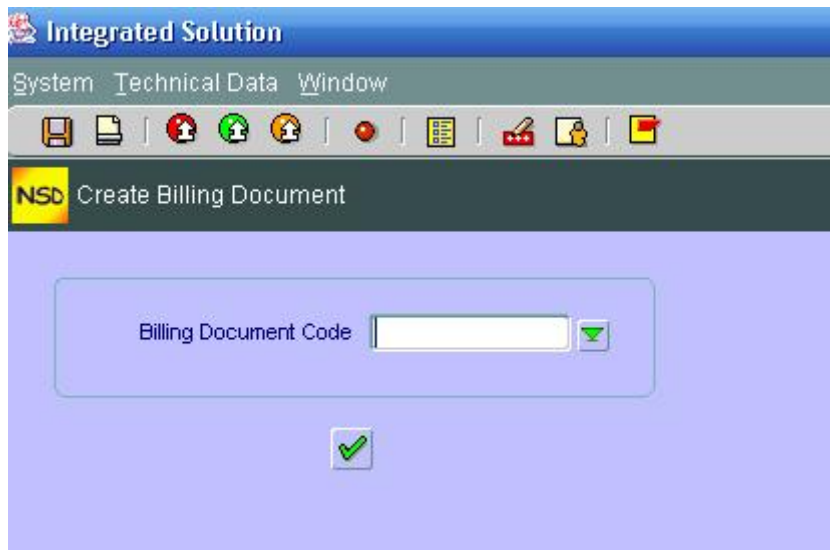
D - BILLING


Create Billing Document

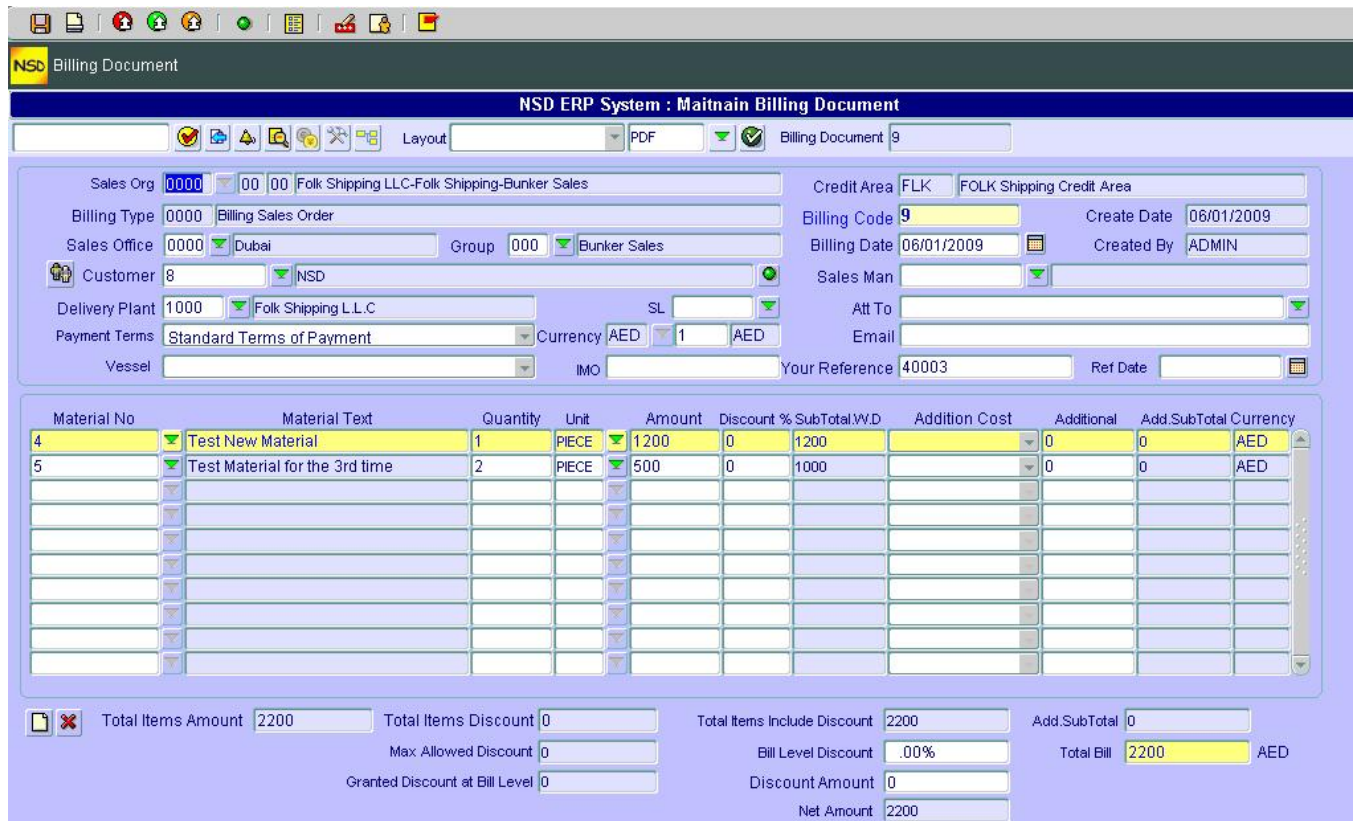
1. From the CRM "Sales Documents → Billing", double click on "Create Billing Document"



2. Enter the billing type you will be using with your customer through the drop down menu
3. Depending on the billing type you have chosen, you will be prompted to enter one of the parameters (Sales Order or Delivery Reference).
NOTE: If you choose Billing Type "Manual Billing", a blank screen will pop up and you will have to enter all materials and other fields manually (usually not recommended because it's time consuming)
4. At this stage, You will have the possibility to Display the:
 - Sales Order status (if the field "Sales Order" was activated by the Billing Type) by clicking on 
 - Sales Order Delivery Schedule (if the field "Sales Order" was activated by the Billing Type) by clicking on 



2. Select the Billing Document you want to maintain through the drop down menu
3. Click on 
4. You will be taken to the screen "Create Billing Document"



5. Proceed as in "Create Billing Document" above to change or add data

6. Save your entries 

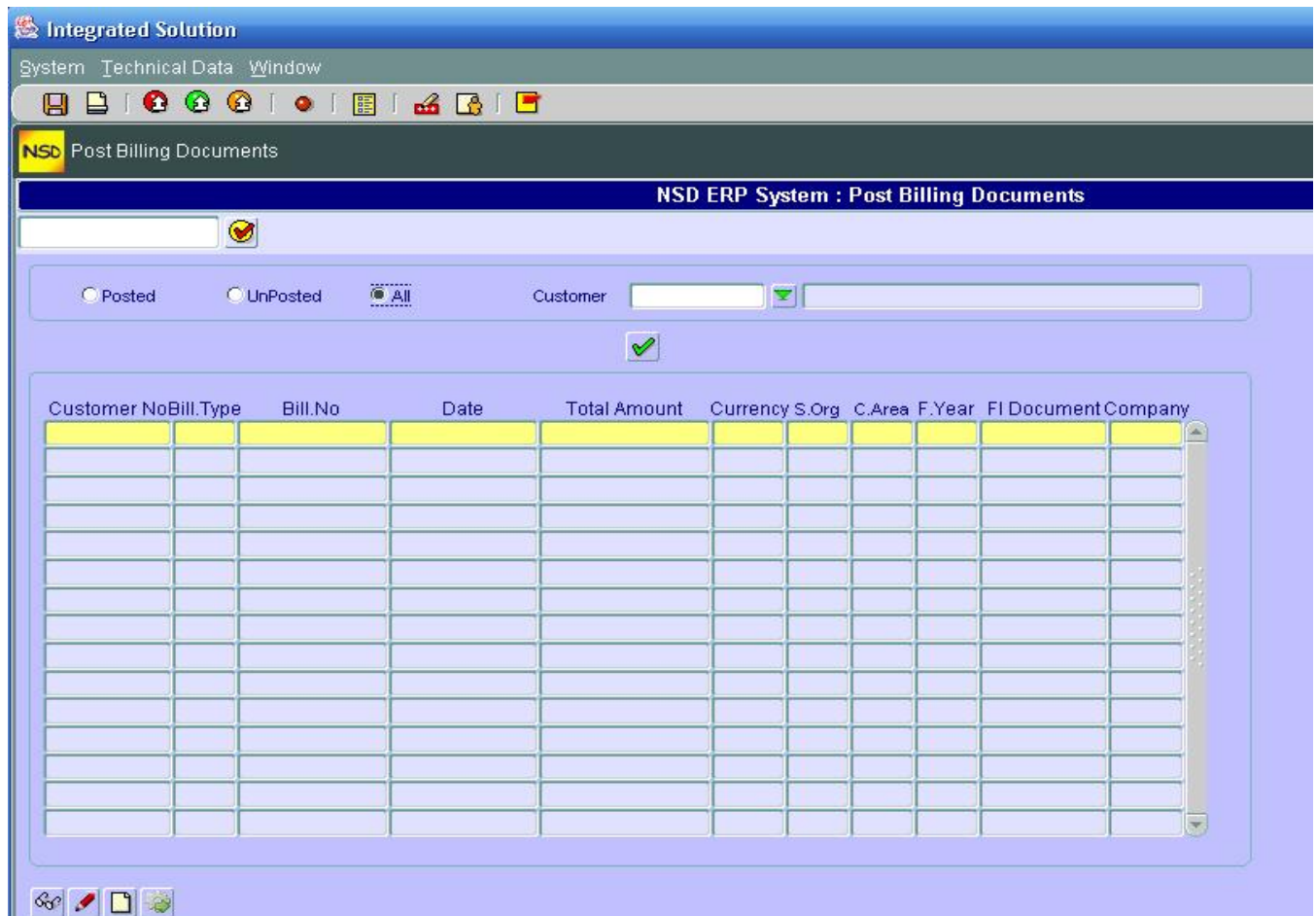
Display Billing Document



You can display an already saved Billing Document by:

1. From the CRM "Sales Documents → Billing", double click on "Display Billing Document"
2. Proceed as in steps 2 to 4 in "Maintain Billing Document"

Post Billing Document

1. From the CRM "Sales Documents → Billing", double click on "Post Billing Document"



2. On this screen you have 4 search filters (Posted, Unposted, All and by Customer).
3. Choose the filter you want and click  (you can change filters as much as you want)
4. Select the line (billing document) you want to post and click 
5. You can also Display or Maintain a selected document or create a new billing document from this screen as in "Post Delivery Document" above.