

## How to Place an Order in Your Order Management System

Your Nexternal Order Management System (OMS) provides you with an internal ordering system (back office) through which you can manually place orders you've received via phone, fax, email, or other channel.

In most cases the internal ordering system will look the same or similar to your online store – but if you look at the URL when you are there you will see it begins with “https://oms.nexternal.com”, and that’s how you know you are still in your back office area and not in your online store.

There are two ways to place an order in your OMS through this internal ordering system.

### A. From the Customer Record:

1. First either lookup the customer if they already exist in your database, or create the customer record in your database - then click on their name from the customer list page.
2. Scroll down to the *Place Order* button and click it. This will take you to the internal ordering system.
3. Add items to cart and check out as normal.

### B. From the Order List Page:

1. Go to Orders in the left navigation menu, and click the *New* button (blue button at the top).
2. Click on the *Identify* button on the right of the screen, and you will land on a page that allows you to either find an existing customer\* or create a new one.
3. If you search for an existing customer, when you get the results click on the paperclip next to the customer for whom you wish to place the order, to attach that customer to the order.
4. If you are creating a new customer, then you will skip step 3 above and the customer will automatically be attached to the order.
5. Add items to cart and check out as normal.

\* We recommend using only one field - the Last Name, Company Name or the Email field - note you do not need to fill in all those fields.