

ACCOUNT SALES

Invoices will be sent out at the end of the week by Head Office.

1. Click on Order Processing icon on front page
1. Input "c" into Order number field
2. Input the relevant account number in the Account number field (you can search by entering the name and pressing ENTER)
3. Input order number / reference into Customer order no field
4. Enter stock number in the Product field
5. Enter quantity in the Quantity field
6. The default price (ex-VAT) for that product for that customer will automatically appear in the Price field. You CAN change this manually.
7. Status field. **This is critical**
 - a. PRO: Process Document – line correct and able to be processed
 - b. SBO: Sales Back Order – line on back order due to insufficient stock – will be automatically delivered when we receive stock.
 - c. BRK: Break Order Line – allows you to break a line – ie customer wants 5, you have 3 to sell now and 2 to follow from a replenishment from the warehouse. Window pops-up to explain how this works.
8. Continue to add lines and then click on Process icon in grey header panel
9. Ensure that Action field reads "Advice Note" (if not, change it)
10. If you haven't entered a customer order no / reference you will be prompted to do so again here
11. Press ENTER to complete the sale

For **TX sales** to account customers, process steps 1-3 as per these instructions, and then treat as a standard TX

- change the line status to IBT and select 20-Warehouse
- change Action field on process sheet to "Action Back to Backs"

For **Telephone Orders** to account customer, treat as above, but change

- the Delivery Method to "delivered"
- the Status to "SBO"
- the Action field to "transfer order"

Any questions, please call Andrew – 079000 87595 or 0207 2398 310