

## **TELEPHONE ORDERS**

For taking payment from the customer and having the goods delivered from the warehouse.

1. Click on Order Processing icon on front page
2. Input "c" into Order number field
3. Change Order category field to "**Delivered**"
4. Click on Options icon in left hand pane
5. Select "Complete" from Supply Status field on left hand side (to ensure that all goods are delivered at once, not in bits)
6. Click on Lines icon in left hand pane
7. Enter stock number in the Product field
8. Enter quantity in the Quantity field
9. **Change Status field to **SBO****
10. Continue to add lines (**all status SBO**) as required then click on Process icon in grey header panel
11. **Change Action field to "Transfer order" (this will print the pick note in the warehouse)**
12. Enter the customer's name in the Customer Order no field. (This will allow you to search for the order easily later).
13. Enter customer's name (again) in Delivery name field
14. **Enter customer's Address, Post Code and telephone number and any other info you want the warehouse and driver to see in the Address field**
15. Select appropriate payment method from Type drop down (if cash, enter amount given to you by the customer - change will be shown on bottom right hand corner)
16. Press RETURN to complete the sale and again for the next pop-up (no change required) and again for the next pop-up (make sure you are transferring to the warehouse)
17. An A4 receipt will be printed on your printer for the customer.

For **ACCOUNT CUSTOMERS** the process is exactly the same except at :-  
Stage 2: you change the Account number from the branch cash account to the customer's account number

Stage 6: prices are **excluding VAT** as it is to an account customer

Stage 11: enter the customer's order number rather than their name

Stages 12 & 13: there should be no need to change the address

Stages 15 & 16: not required as the customer is an account customer