Counter & Regular Sales Practice Exercises

Counter Sales
Regular Sales
Sales Quotes
Returns

Types of Counter Orders

Counter Sales Order (customer pick up)

- Walk in - Repeat customer
  - Paid in Advance: Cash/Check/Credit Card
  - On Account
- Walk in - One time customer
  - Paid in Advance: Cash/Check/Credit Card
- Walk in – New customer
  - Paid in Advance: Cash/Check/Credit Card

Counter Sales Order (customer pick up)

- Phone in - Repeat customer
  - Paid in Advance: Cash/Check/Credit Card
  - On Account
- Phone in - One time customer
  - Paid in Advance: Cash/Check/Credit Card
- Phone in – New customer
  - Paid in Advance: Cash/Check/Credit Card

Counter Sales Order (to be delivered)

- Walk in - Repeat customer
  - Paid in Advance: Check/Cash/Credit Card
  - COD
  - On Account
- Walk in - One time customer
  - Paid in Advance: Cash/Check/Credit Card
- Walk in – New customer
  - Paid in Advance: Cash/Check/Credit Card

Counter Sales Order (to be delivered)

- Phone in - Repeat customer
  - Paid in Advance: Check/Cash/Credit Card
  - COD
  - On Account
- Phone in - One time customer
  - Paid in Advance: Cash/Check/Credit Card
- Phone in - New customer
  - Paid in Advance: Cash/Check/Credit Card

Types of Regular Sales Orders

Regular Sales Order (customer pick up)

- Walk in - Repeat customer
  - Paid in Advance: Cash/Check/Credit Card
  - On Account
- Walk in – New customer
  - Paid in Advance: Cash/Check/Credit Card

Regular Sales Order (to be delivered)

- Walk in - Repeat customer
  - Paid in Advance: Cash/Check/Credit Card
  - On Account
  - COD
- Walk in – New customer
  - Paid in Advance: Cash/Check/Credit Card
  - COD

Regular Sales Order (customer pick up)

- Phone in – Repeat Customer
  - Paid in Advance: Cash/Check/Credit Card
  - On Account
- Phone in – New Customer
  - Paid in Advance: Cash/Check/Credit Card

Regular Sales Order (to be delivered)

- Phone in – Repeat Customer
  - Paid in Advance: Cash/Check/Credit Card
  - On Account
  - COD
- Phone in – New Customer
  - Paid in Advance: Cash/Check/Credit Card
  - COD

Other Types of Regular Sales Orders

- Emergency Back Orders
- Direct Ship

Sales Order Status Meanings

1. WIP
   - SO that has not been booked
     - Qty can be committed to the order
2. Booked
   - Booked SO
     - Shipments to customer have not been generated
     - Transfers (if needed) have been generated
     - PO (if EBO/DS) have been generated
3. In Fulfillment
   - Pick Tickets have been generated
   - Shipments to the customer have been generated
4. Closed
   - All items needing to be sent to customer have been sent and invoiced
5. Cancelled
   - All items that were booked have been canceled from the SO

Cancel Sales Order

- **There are 3 ways to Cancel SO:**

  - **Entire Order:** Select Cancel option from order's popup menu.

  - **Line Item:** Edit the order and go to the Counter Order—Items page, select the items to cancel and click Cancel.

  - **By Stock:** Edit the order and go to the Counter Order-Items page, click the Cancel link of the item you want to cancel. Complete the Cancel Order Item form and click Submit.

  *Always check the Order's popup menu. If the **Refund** option is shown, select it and complete the refund process.

Counter Sales – 1

Counter Sales Order (customer pick up)

Walk in – Repeat Customer

Paid in Advance: Cash/Check/Credit Card

- Shipping & Billing Info
- Add 2 items (avb qty > 0)
- Locate Stock
  - *This is when you would physically find the items in their locations*
- Book
- Cash Receipt (cash, check, credit card or split methods)
- Pick Verify
- Dispatch

Counter Sales – 2

Counter Sales Order (customer pick up)

Phone in - Repeat customer

> Paid in Advance: Cash/Check/Credit Card

- Shipping & Billing Info
- Add 2 items (avb qty > 0)
- Add 1 item (backorder)
- Locate Stock
  - *This is when you would physically find the items in their locations*
- Book
- At Cash Receipt, select Cancel
- Pick Verify & Stage Material (STOP)
  - Close the page/tab (not the browser)
- When customer arrives: Lookup Order, Edit and Continue Process
  - Cash Receipt
  - Dispatch

Counter Sales – 3

Counter Sales Order (customer pick up)

Phone in - Repeat customer

   On Account

- Shipping & Billing Info
- Add 2 items (avb qty > 0)
- Locate Stock
  - *This is when you would physically find the items in their locations*
- Book
- Pick Verify & Stage Material (STOP)
  - Close the page/tab (not the browser)
- When customer arrives: Lookup Order, Edit and Continue Process
  - Dispatch

Counter Sales – 4

Counter Sales Order (to be delivered)

Phone in - Repeat customer

    On Account

- Shipping & Billing Info
- Add 2 items (avb qty > 0)
- Add 1 item (backorder)
- Locate Stock
  - *This is when you would physically find the items in their locations*
- Book
- Pick Verify & Stage Material (STOP)
  - Close the page/tab (not the browser)
- Warehouse takes over Trip Delivery

Counter Sales – 5

Counter Sales Order (to be delivered)

Phone in - Repeat customer

    Paid in Advance: Cash/Check/Credit Card

- Shipping & Billing Info
- Add 2 items (avb qty > 0)
- Locate Stock
  - *This is when you would physically find the items in their locations*
- Book
- Cash Receipt
- Pick Verify & Stage Material (STOP)
  - Close the page/tab (not the browser)
- Warehouse takes over Trip Delivery

Counter Sales – 6

Counter Sales Order (customer pick up)

Phone in - Repeat customer

    On Account

- Shipping & Billing Info
- Add 2 items (avb qty > 0)
- Locate Stock
  - *This is when you would physically find the items in their locations*
- Book
- Pick Verify & Stage Material (STOP)
  - Close the page/tab (not the browser)
- When customer arrives: Lookup Order, Edit and Continue Process
- At Dispatch, Customer decides to cancel 1 item (no longer needed)
  - Select item and Unpick, then select Cancel Reason, then Dispatch
  - If you miss the cancel process, Look up the Order, Edit, then select the line to be cancelled and click Cancel.

Counter Sales – 7

Counter Sales Order (customer pick up)
Phone in - Repeat customer
　　　Paid in Advance: Cash/Check/Credit Card

- Shipping & Billing Info
- Add 2 items (avb qty > 0)
- Locate Stock
  - *This is when you would physically find the items in their locations*
- Book
- Pick Verify & Stage Material (STOP)
  - Close the page/tab (not the browser)
- When customer arrives: Lookup Order, Edit and Continue Process
  - Cash Receipt
  - At Dispatch, Customer decides to purchase another item
  - Edit order and Add Item(s)
  - Cash Receipt for item added
  - Dispatch

Counter Sales – 8

Counter Sales Order (customer pick up)

Walk in - One time customer

     Paid in Advance: Cash/Check/Credit Card

- Shipping & Billing Info
- Add 1 item (avb qty > 0)
- Locate Stock
  - *This is when you would physically find the items in their locations*
- Book
- Cash Receipt
- Pick Verify
- Dispatch

*Remember to capture Customer's Full Name and phone number for reference

Counter Sales – 9

Counter Sales Order (customer pick up)

Walk in – Add New Customer

    Paid in Advance: Cash/Check/Credit Card

- Shipping & Billing Info
- Add 1 item (avb qty > 0)
- Add 1 item (backorder)
- Locate stock
  - *This is when you would physically find the items in their locations*
- Book
- Cash Receipt
- Pick Verify
- Dispatch

Counter Sales – 10

Counter Sales Order (customer pick up)

Phone in - Repeat customer

    Paid in Advance: Customer gives you credit card info

- Shipping & Billing Info
- Add 3 items (backorder qty > 1)
- Book
- Cash Receipt (Customer pays by Credit Card)
- Cancel Exercises:
  - Cancel partial qty for 1 item (stock level)
  - Cancel 1 line & save and exit the sales order (line level)
  - Cancel order via popup menu (order level)
- Refund Sales Order

Regular Sales Orders – 11

Regular Sales Order (to be delivered)

Walk in – Repeat Customer

On Account

- Shipping & Billing Info
- Add 2 items (avb qty > 0)
- Add 1 item (backorder)
- Book
- Print Pick Ticket
  - *This is when you would physically find the items in their locations*
- Pick Verify & Stage Material (STOP)
  - Close the page/tab (not the browser)
- Warehouse takes over Trip Delivery

Regular Sales Orders – 12

Regular Sales Order (customer pick up)

Walk in – Repeat Customer

Paid in Advance: Cash/Check/Credit Card

- Shipping & Billing Info
- Add 2 items (avb qty > 0)
- Book
- Cash Receipt
- Print Pick Ticket
  - *This is when you would physically find the items in their locations*
- Pick Verify
- Dispatch (Pending Shipments Register)

Regular Sales Orders – 13

Regular Sales Order (to be delivered)

    Phone in – Repeat Customer

     Paid in Advance: Customer gives you credit card info

- Shipping & Billing Info
- Add 2 items (avb qty > 0)
- Book
- Cash Receipt (Customer pays by Credit Card)
- Print Pick Ticket
    - *This is when you would physically find the items in their locations*
- Pick Verify & Stage Material (STOP)
- Warehouse takes over Trip Delivery

Regular Sales Orders – 14

Regular Sales Order (to be delivered)

    Phone in – Repeat Customer

     On Account

- Shipping & Billing Info
- Add 2 items (avb qty > 0)
- Book
- Print Pick Ticket
  - *This is when you would physically find the items in their locations*
- Pick Verify & Stage Material (STOP)
  - Close the page/tab (not the browser)
- Warehouse takes over Trip Delivery

Regular Sales Orders – 15

Regular Sales Order (to be delivered)

Phone in – New Customer

Paid in Advance: Customer gives you credit card info

- Shipping & Billing Info
- Add 2 items (avb qty > 0)
- Book
- Cash Receipt (Customer pays by Credit Card)
- Print Pick Ticket
- Pick Verify & Stage Material (STOP)
  - Close the page/tab (not the browser)
- Warehouse takes over Trip Delivery

Regular Sales Orders – 16

Regular Sales Order (customer pick up)

Phone in – New Customer

Paid in Advance

- Shipping & Billing Info
- Add 2 items (avb qty > 0)
- Book
- Print Pick Ticket
  - *This is when you would physically find the items in their locations*
- Pick Verify & Stage Material (STOP)
  - Close the page/tab (not the browser)
- When customer arrives: Lookup Order, Edit and Continue Process
  - Cash Receipt: Cash, Check, Credit Card (when customer arrives)
  - Dispatch (Pending Shipment Register)

Sales Quotes – 17

- Create new Quote
- Add items (avb qty > 0)
- Shipping & Billing Info (Valid Until)
- Approve Quote
- Make Quote into Counter Order
- Complete order through to Dispatch or Shipping

Convert Quote to Counter Order – 18

- Lookup Quote
- Make Order
- Complete Shipping & Billing (Customer is picking up)
- Review the items
- Locate Stock
- Book
- Cash Receipt*
- Verify Picking
- Dispatch**

*Only take Cash Receipt if customer is present, otherwise Book, Verify Picking, stage material and stop.

**When Customer arrives do Cash Receipt and Dispatch

Convert Quote to Regular Order – 19

- Lookup Quote
- Make Order
- Complete Shipping & Billing (Customer is picking up)
- Review the items
- Book
- Print Pick Ticket
  - *This is where you physically find items in their locations*
- Verify Picking & Stage material (STOP)
- When customer arrives:
  - Cash Receipt*
  - Dispatch**

*Only take Cash Receipt if customer is present, otherwise Book, Verify Picking, stage material and STOP

**Dispatch via Pending Shipments Register

Sales Return – 20

Invoiced Return

- Customer brings back item(s) to return
- Start New Return (you know 2 things, the customer & item(s)
  - Enter customer
  - Enter product
  - Find Invoice & Select
- Add Item(s) & Return Quantity
- Receive Return
- Refund Return - Cash, Check, Credit, Credit Card are Refund Methods
  - Note: Your Return may not show all methods.
    - Cash refunds are dependent on Cash limit set for Cash Desk
    - Check indicates AR will mail a refund check to the customer address provided
    - Credit is for On Account customers
    - Credit Card should be the same card used when material was purchased
- Print Return Item slip and attach to the material being returned

Sales Return – Dmg/Dfc – 21

Invoiced Return

- Customer brings back item(s) to return
- Start New Return - you know 2 things, the customer & item(s)
  - Enter customer
  - Enter product
  - Find Invoice & Select
- Add 1 item that is damaged or defective
- Receive Return
- Refund Return - Cash, Check, Credit, Credit Card are Refund Methods
  - Note: Your Return may not show all methods.
    - Cash refunds are dependent on Cash limit set for Cash Desk
    - Check indicates AR will mail a refund check to the customer address provided
    - Credit is for On Account customers
    - Credit Card should be the same card used when material was purchased
- Print Return Item slip and attach to the material being returned

Sales Return – 22

NO Invoice Return

Use the No Invoice Return if:

- Material was sold from prior system
- You cannot find the invoice in Ximple™
- Customer Buyout

- Start New Return, select No Invoice
- Add item and return qty (repeat as needed)
- Receive Return
- Refund Return
  - Cash, Check, or Credit are Refund Methods
  - Note: Your Return may not show all methods.
    - Cash refunds are dependent on Cash limit set for Cash Desk
    - Check indicates AR will mail a refund check to the customer address provided
    - Credit is for On Account customers
- Print Return Item slip and attach to the material being returned

Pending Shipments Register – 23

Exercise 1

- Un-enroll shipment from Will Calls tab

- Enroll same shipment into a Trip

Exercise 2

- Un-enroll shipment in Picked status from Non Will Call tab

- Enroll same shipment into Will Call trip

Exercise 3

- Complete Dispatch for shipment in Picked status - Will Calls

Clean up WIP Orders

This should be done DAILY

- Sales Order Lookup
- Filter by your name
- Filter status = WIP

- View orders (one at a time)
- Delete if no longer needed

Remember:

- Counter must be deleted from Counter Menu
- Standard must be deleted from Order Mgmt, Sales Order
- Free Form must be deleted from Order Mgmt, Free Form Order