

## Sales Practice Exercises

### Counter Sales

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#### 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 (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

### Order Types

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#### 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)

- 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

# Regular Sales

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## 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

# Order Types

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## 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)

## 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

## **Differences between Counter orders and Standard orders**

### **Counter Orders**

- One Time Customers
- Does not allow Direct Ship orders
- Default Ship Method is Will Call
- Pick Ticket is generated automatically but is not printed
- Invoice is generated and printed at Dispatch

### **Standard orders**

- No One Time customers
- Allows Direct Ship orders to be created
- Default Ship Method comes from Customer Preferences
- Pick Ticket is not generated automatically
- Invoice is generated but will be processed in the Print/Send Queue

## **Sales order Status Meanings**

### **WIP**

- SO that has not been booked
- Qty can be committed to the order

### **Booked**

- Booked SO
- Shipments to customer have not been generated
- Transfers (if needed) have been generated
- PO (if EBO/DS) have been generated

### **In Fulfillment**

- Pick Tickets have been generated
- Shipments to the customer have been generated

### **Closed**

- All items needing to be sent to customer have been sent and invoiced

### **Cancelled**

- All items that were booked have been canceled from the SO

## Cancel Sales Order

There are 3 ways to Cancel SO:

1. **Entire Order:** Select Cancel option from order's popup menu.
2. **Line Item:** Edit the order and go to the Counter Order—Items page, select the items to cancel and click Cancel.
3. **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.

## Modifying the Customer Sales Price

**Custom Price:** The checkbox is available to authorized sales persons. Place a check in the checkbox and enter the custom price in the Price field. **NOTE:** Gross Margin is ignored when doing Custom pricing.

**Marking Up an Item:** In the GM/Disc% field, enter the percent to markup followed by two periods at the end. Example (a markup of 5% would be entered as 5..) If changes are to be made to an item price that has been marked up, then the item price needs to be recalculated (system calculated price restored) prior to entering a new percentage.

**Calculating % Discount:** If you do not know the percentage you want to discount, and do not have the authority to give the customer custom pricing, enter the price you want to give the customer in the Discount field and add an asterisk \*. Tab out of the discount field, the system will automatically calculate the percentage to discount based on the amount you entered.

**Pricing Item Based on GM%:** To mark up the price to a specific GM% (this will be based off system cost to use in sales), click the GM% checkbox and enter in the GM% you want to make on this sale, afterward, click on the Price search button in order to recalculate price. This price cannot fall below the minimum sales price, nor can it be below the user's allowable discount.

## Orders in WIP status

Every night the system will check WIP orders for committed items. Your system has a specific # days that it will allow WIP orders to have committed qtys. Once it reaches that # of days, it will UNCOMMIT the qty for those items.

## 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*

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

- 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



## 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

## Counter Sales 11

### 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)
- Book
- Locate Stock
  - *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
  - At Dispatch, Customer decides to purchase another item
    - Edit order and Add Item(s) (Re-Book)
    - Cash Receipt for item added
    - Pick Verify
    - Dispatch

## Counter Sales 12

### Counter Sales Order (customer pick up)

#### *Walk 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
- Dispatch
- Customer asks to add additional items to same order
  - Reopen Order
  - Add items(s)
  - Re-Book
  - Locate Stock
  - Pick Verify
  - Dispatch

## Regular Sales Orders 13

### 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 via “Picking Queue Control” option
  - *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 14

### 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 via “Picking Queue Control” option
  - *This is when you would physically find the items in their locations*
- Pick Verify
- Dispatch (Pending Shipments Register)

## Regular Sales Orders 15

### 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 16

### 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 17

### 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
  - *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 18

### Regular Sales Order (customer pick up)

#### *Phone in – New Customer*

- Paid in Advance: Cash/Check/Credit Card
- 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

## Regular Sales Orders 19

### Regular 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) Force a Backorder on 1 item
- 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

## Regular Sales Orders 20

### Regular 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)
- 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
  - At Dispatch, Customer decides to purchase another item
    - Edit order and Add Item(s) (Re-Book)
    - Cash Receipt for item added
    - Pick Ticket Print/Pick Verify
  - Dispatch

## Regular Sales Orders 21

### Regular Sales Order (customer pick up)

#### *Phone in – Repeat Customer*

- On Account
- Shipping & Billing Info
- Add 2 items (avb qty > 0)
- Book
- Print Pick Ticket via “Picking Queue Control” option
  - *This is when you would physically find the items in their locations*
- Pick Verify
- When customer arrives:
  - Dispatch (Pending Shipments Register)

## Regular Sales Orders 22

### Regular Sales Order (customer pick up)

#### *Phone in – Repeat Customer*

- On Account
- Shipping & Billing Info
- Add 2 items (avb qty > 0)
- Book
- Print Pick Ticket via “Picking Queue Control” option
  - *This is when you would physically find the items in their locations*
- Pick Verify
- When customer arrives:
  - Dispatch (Pending Shipments Register)
  - 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.

## Sales Quote 23

### *Phone in – Repeat Customer*

- Create new Quote
- Add items
- Shipping & Billing Info (Valid Until)
- Approve Quote

## Sales Quote 24

### *Walk in – New Customer*

- Create new Quote
- Add items
- Shipping & Billing Info (Valid Until)
- Approve Quote

## Sales Quote 25

### *Walk in – One Time Customer*

- Create new Quote
- Add items
- Shipping & Billing Info (Valid Until)
- Approve Quote

## Sales Quote 26

### **Convert Quote to Counter Sales Order**

- Lookup Quote
- Make Order
- Complete Shipping & Billing (Customer is picking up)
- Review the items
- Locate Stock
  - *This is where you physically find items in their locations*
- Book
- When customer arrives:
  - Cash Receipt\*
  - 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



## Sales Quote 27

### Convert Quote to Regular Sales Order

- 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.

\*\*When Customer arrives do Cash Receipt and Dispatch

## Sales Return 28

### 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 29

### 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 30

### 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

## Sales Return 31

### 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 to be exchanged because it is damaged or defective
- Select Stock Location
- Receive Return
- Print Return Item slip and attach to the material being returned

**Note:** There are no Refunds for Exchanged items.

## Pending Shipments Register 32

### 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 Management, Sales Order
- Free Form must be deleted from Order Management, Free Form Order

## Sales Rep Dashboard

The Sales Rep Dashboard will allow you to view the following:

- My Quotes
- My Orders
- My Orders with Backorders
- My On Line Customer Orders (You are the assigned rep)
- My On Line Customer Orders with Backorders (You are the assigned rep)
- My Purchase Orders