TULCO OILS	Credit Hold Sales Order SOP 112 Revision D, 10/30/2020 Approved by: Don Stanton

PURPOSE:

If a customer exceeds their credit limit, either days or dollars, you may enter a credit hold order.

PROCESS STEPS:

1. Navigate to Sales > Order Entry.
2. On the General tab:
    a. Select appropriate Bill-To and Ship-To Companies by clicking on the magnifying glass. ***Note:*** The default Ship-To Company and other header fields will be auto-populated by selecting a Bill-To Company, or over-ridden by the user.
    b. Enter the Customer Purchase Order Number into the Bill-To PO field, and Ship-To PO if that information is provided
3. On the Misc1 tab, confirm the Freight and Ship Via fields are correct. If incorrect, change by clicking on the magnifying glass and selecting another option.
4. Click the Dates tab and fill in the applicable date fields:
    a. Enter the **Wanted** Date
    b. The Due to ship date will calculate based on the delivery lead time.
        Note: Due to ship is the date used to drive demand in MRP and must be filled in for demand to flow properly.
5. Click the Add button to begin adding parts to the sales order. The 'Edit Sales Order Line' window will open.
    a. In the Part Number box, click on the magnifying glass to search for the part.
        Note: If you do not know the product number, Click Contains button and type description in "Search all columns…" bar
    b. Enter the Quantity for the part
    c. Confirm the Unit Price shown is correct. If the Unit Price is incorrect, change to the correct price.
    d. Click Next to add additional parts.
        Note: Drum deposits will need to be added to the sales orders
    e. Click Save and exit the 'Edit Sales Order Line' window.
6. Return to the General tab
7. Click Save – this will generate an Order number in the Order Number field

8. If the customer is over their past due days or credit limit, a prompt will appear indicating this. With proper authorization you can approve the order by clicking approve order
9. If the customer is over their never exceeds days or credit limit, a prompt will appear indicating this. This order must be put on credit hold. This is done by clicking credit hold.
10. Click OK

Note: These orders will appear in a preview for the accounting department to review.
These orders will not appear in MRP.

REVISIONS

Rev	Date	Change
I/R	10/23/17	New
A	3/16/18	Button names.

B	5/7/18	Moved steps to align with other SOPs (Cash Sale)
C	5/10/18	Change steps to unify with other SOPs
D	10/30/20	Change to v16 Menu names