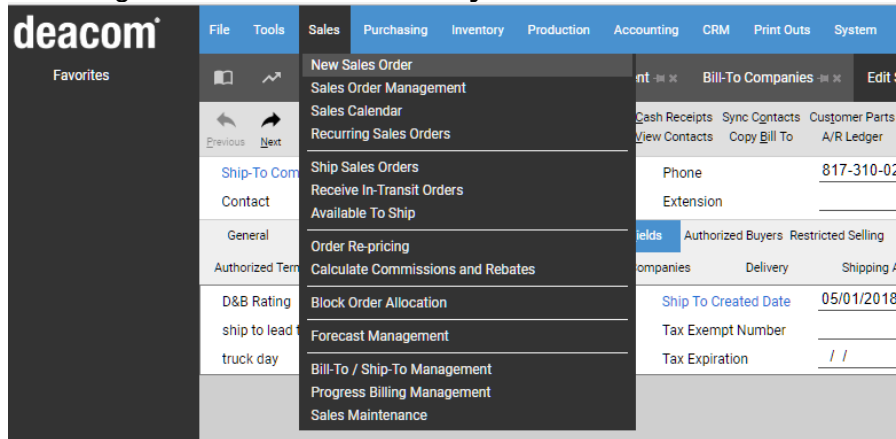


PURPOSE: Price Adjustments are completed when the price charged on the original invoice was incorrect.

PROCESS STEPS:

1. Navigate to **Sales > Order Entry**



2. On the General tab:

- Select appropriate Bill-To Company and Ship-To Company 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.
- Enter the Customer 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.
- Click the magnifying glass on **Link To SO**. Choose the original sales order this credit references.

4. Click the Add button to begin adding parts to the sales order. The 'Edit Sales Order Line' window will open.

- In the Cust. Part Number box, click on the magnifying glass to search for the part.
- Use the Part Number field if the desired part is not listed under Cust. Part Number. If you do not know the product number, Click Contains button and type description in "Search all columns..." bar

Note: See SOP 114_Customer Part Cross Reference to set pricing for specific products for the Bill-To Customer,

or directly from the Edit Sales Order Line window:

- In the Part Number line, click on the magnifying glass to search for the part.
- Double-click the desired part to choose, it will close the "select a Part Number" window.
- Return to the Cust. Part Number selection by clicking on the magnifying glass, and press the Add New button.
- In the "Bill-To/Ship-To Part Information" window, complete:
 - Use the search box in the Bill-To Company field to select the appropriate Customer
 - If applicable, enter a Ship-To Company.
 - Change Cust. Part Number to match the customer's number (if applicable)
 - Enter Sales Price by stock pricing unit (i.e., Gallons, Pounds, Each, Tubes, & Case)



Price Adjustments

SOP 261

Revision F, 10/30/2020

Approved by: Don Stanton

5. Confirm the Sales Unit is the “container unit”
6. Click ‘Save’ and close
7. Double-click the newly added Cust.Part Number
- c. Enter in the Quantity, this will be a **negative number** quantity
- d. Enter the Unit Price that was charged.
- e. Click **Do Not Post Inventory** box
- f. Click Next
- g. Enter the Part Number again.
- h. Enter the Quantity, this should match the quantity from Step B
- i. Enter the Unit Price that will be charged
- j. Click **Do Not Post Inventory** box
5. Click Save and exit the ‘Edit Sales Order Line’ window.
6. Return to the General tab
7. Click Save – this will generate a Sales Order number in the Order Number field

Note: All sales orders can be viewed and edited by navigating to Sales > Sales Order Management and clicking on the ‘View’ magnifying glass with order type set to “Sales Order” and order status set to ‘all orders’ or ‘not shipped.’

REVISIONS

Rev	Date	Change
I/R	12/27/17	New
A	3/21/18	Button names
B	7/19/18	Moved steps to align with other SOPs (Cash Sale)
C	8/3/18	Adding Cust. Part Number as 1 st step.
D	10/24/18	Add Cust. Part Cross Reference/Override Pricing steps
E	12/18/18	Change CPXR steps
F	10/30/20	Change to v16 Menu names