

PURPOSE:

Sales Orders define the items or services to be sold to customers along with the appropriate payments terms, delivery dates, item descriptions, quantities, price, shipping terms and all other obligations and conditions.

Note: Tulco National Division Sales Orders will ALL have Invoicing Facility = "National"

Tulco International Division Sales Orders will ALL have Invoicing Facility = "International"

Tulco Midland Division Sales Orders will ALL have Invoicing Facility = "Midland"

(see SOP 113_Cross Facility Orders if the Invoicing Facility needs to be different than the Facility on the Sales Order)

PROCESS STEPS:

1. Navigate to **Sales > Order Entry**
2. On the General tab:
 - a. 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.
Note: The Ship-To Invoicing Facility will drive the Order Type to "Cross-facility" when selected.
 - b. Enter the Customer Purchase Order Number into the Bill-To PO field, and Ship-To PO if that information is provided
Note: Do Not Use "VERBAL..." or generic terms in PO fields. Use Full Names if no specific Purchase Order Number has been provided.
Note: Header Notes are a memo field used to store notes regarding the **order** and are printed on all sales documents.
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 Cust. Part Number box, click on the magnifying glass to search for the part.
 - b. 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:
 - i. In the Part Number line, click on the magnifying glass to search for the part.
 - ii. Double-click the desired part to choose, it will close the "select a Part Number" window.
 - iii. Return to the Cust. Part Number selection by clicking on the magnifying glass, and press the Add New button.
 - iv. In the "Bill-To / Ship-To Part Information" window, complete:
 1. Use the search box in the Bill-To Company field to select the appropriate Customer
 2. If applicable, enter a Ship-To Company.
 3. Change Cust. Part Number to match the customer's number (if applicable)
 4. Enter Sales Price by stock pricing unit (i.e., Gallons, Pounds, Each, Tubes, & Case)
 5. Confirm the Sales Unit is the "container unit"



Sales Order Entry

SOP 103

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Approved by: Venezia Pena

6. Click 'Save' and close
7. Double-click the newly added Cust.Part Number
- c. Enter the Quantity for the part, press tab
- d. Confirm the Unit Price shown is correct. If the Unit Price is incorrect, change to the correct price.
- e. Click Next to add additional parts

Note: Freight Outbound Sales Charge/Freight Outbound Oklahoma Sale
or Fuel Surcharge/Fuel Surcharge Oklahoma if applicable

Note: Freight Outbound Charge can be determined from the Total Weight line above the Items.

- i. Add ALL of the Item(s) , add 35 lbs. to include pallet weight.
- ii. Note the Total Weight

Record: 1 of 2 Seconds to run: 0.03 Ordered: 3.0000 Shipped: 0.0000 Margin %: 20.50% Tare Weight: 66.000 Total Weight: 844.80											
Line	Part Number	Description	Account	Ordered	Sales Unit	Shipped	Price	Extension	Margin %	Notes	Tare Weight
1	4247048	Synthetic P 40: 1/55	4210-16-000	2.0000	1/55	0.0000	21.950	2,414.50	20.50%		66.000
2	Sales Tax	Sales Tax	2500-00-000	1.0000	Each	0.0000	0.000	0.00	0.00%		0.000

- iii. Get the Shipping Estimate from the carrier
- iv. Add the "Freight Outbound Charge" with the freight amount
- f. Click Save and close 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

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	11/17/17	New
A	3/26/18	Added Tulco Requirement for "Bill-To PO" & "Ship-To PO"
B	5/10/18	Moved steps to align with other SOPs (Cash Sale)
C	8/3/18	Adding Cust. Part Number as 1 st step.
D	8/13/18	Added Tulco "additional parts" notes
E	8/30/18	Note for no more "verbal..." PO#'s
F	9/5/18	Change note to 114_Customer Part Cross Reference
G	9/7/18	Add Cust. Part Cross Reference/Override Pricing steps
H	10/3/18	Add note for printing of Walk-In's
I	10/5/18	Add Section for WALK-IN via "HOUSE CASH ACCOUNT"
J	11/16/18	Add Total Weight specifics for "Freight Outbound Charge"
K	12/18/18	Change CPXR steps
L	1/11/19	Add note for "Cross Facility Orders" reference
M	3/7/19	Change picture for Total Weight
N	3/14/19	Change Fuel/Freight name changes
O	4/26/19	Change notes for deposit = positive/credit = negative
P	11/21/19	Add language for International/National division changes
Q	10/30/20	Change to v16 Menu names
R	1/10/22	CSR clarify remove credit/deposit items & Total Weight notes