



Cross Facility Sales Orders

SOP 113

Revision G, 01/11/2022

Approved by: Venezia Pena

PURPOSE:

Order type that allows items to be shipped from one facility but sold in another. When a Cross-facility order type is selected, the system will use the facility indicated in the "Invoicing Facility" field on the General tab of the sales order header to determine in which facility the order will be invoiced. The facility indicated in the "Facility" field on the General tab represents the shipping facility. Cross-facility orders were designed for companies with multiple retail locations.

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"

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.
 - 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.
 - c. Verify the "Shipping Facility" on the **Facility** line.
 - d. Change the Order Type to "**Cross-facility**".
Note: The Ship-To Invoicing Facility will drive the Order Type to "Cross-facility" when selected from Step 2.a above.
 - e. Enter the **Invoicing Facility** – this is the facility that is going to get credit for the sale
Note: This may default if the customer is set up with an invoicing facility
2. On the Misc₁ tab,
 - a. Confirm the Freight and Ship Via fields are correct. If incorrect, change by clicking on the magnifying glass and selecting another option.
3. 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.
4. 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.
 - b. Enter the quantity for the part and confirm the price shown is correct. If the price is incorrect, change to the correct price.
 - c. Click Next to add additional parts.
 - d. Click Save and close the 'Edit Sales Order Line' window.
5. Return to the General Tab
6. Click Save – this will generate an order number in the Order Number field

Cross-facility on Credit Hold: Notify *Accounting AR-Tulco* with Sales Order # that has been put on Credit Hold, so the Credit Approval will restore this as a "Cross-facility" order type.



Cross Facility Sales Orders

SOP 113

Revision G, 01/11/2022

Approved by: Venezia Pena

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	12/01/17	New
A	5/10/18	Add step to change Shipping Facility, Moved steps to align with other SOPs
B	10/11/18	Add note for "Cross-facility"-Credit Hold's
C	11/12/18	Made changes to reflect Bill-To/Ship-To defaults and form layout
D	1/11/19	Change order of steps to "turn on" Invoicing Facility to enable change
E	11/21/19	Add language for International/National division changes
F	10/30/20	Change to v16 Menu names
G	1/11/22	Remove Deposits/Credits language