PURPOSE:

Pricing Order- Bill To
This type of order sets pricing for specific products for the Bill to customer on the order. This pricing is for all of the Ship to customers associated with the Bill to customer, unless overridden by a Pricing Order - Ship to. This type of order cannot be shipped. Reference Release (Sales Date 5) and Expires dates to set when pricing orders are in effect and expires

Pricing Order - Ship to

This type of order sets pricing for specific products for the Ship to customer on the order. This type of order cannot be shipped. Reference Release (Sales Date 5) and Expires dates to set when pricing orders are in effect and expires.

PROCESS STEPS:

1. Navigate to Sales > New Sales Order.
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
      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. Change the Order Type to "Pricing Order"
      i. If it is for a bill to, change to "Pricing Order – Bill-To"
      ii. If it is for a ship to, change to "Pricing Order – Ship-To"
      iii. If it is for a billing group, change to "Pricing Order - Billing Group"
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 line, 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

Note: All Pricing 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 "Pricing Order" and order status set to 'all orders' or 'not shipped.'

REVISIONS

Rev	Date	Change
I/R	10/23/17	New
A	5/2/18	Add Dates tab needs
B	5/10/18	Moved steps to align with other SOPs
C	8/30/18	Note for no more "verbal…" PO#'s