



Drop Ship Sales Order

SOP 118

Revision I, 04/26/2019

Approved by: Don Stanton

PURPOSE:

The drop ship process handles sales/purchasing situations where material does not flow through the stockroom, but ships directly from the vendor to the customer.

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 "Drop Shipment"
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.
Note: 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"
 6. Click 'Save' and close
 7. Double-click the newly added Cust.Part Number
 - c. Enter the Quantity for the part



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- 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: Drum/Tote deposits (Quantity = positive number), Drum/Tote credits (Quantity = negative number) will need to be added to the sales orders and Freight Outbound Sales Charge/Freight Outbound Oklahoma Sale or Fuel Surcharge/Fuel Surcharge Oklahoma if applicable
- f. 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 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 | 11/29/17 | New |
| A | 5/4/18 | Button names, moved order of tasks |
| B | 5/10/18 | Change steps to unify with other SOPs |
| C | 8/3/18 | Adding Cust. Part Number as 1 st step. |
| D | 8/30/18 | Note for no more "verbal..." PO#'s |
| E | 9/5/18 | Change note to 114_Customer Part Cross Reference |
| F | 9/7/18 | Add Cust. Part Cross Reference/Override Pricing steps |
| G | 12/18/18 | Change CPXR steps |
| H | 3/14/19 | Change Fuel/Freight name changes |
| I | 4/26/19 | Change notes for deposit = positive/credit = negative |