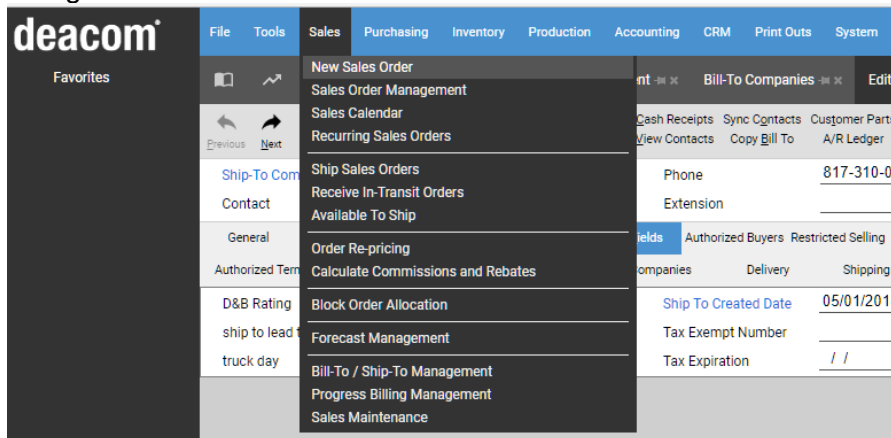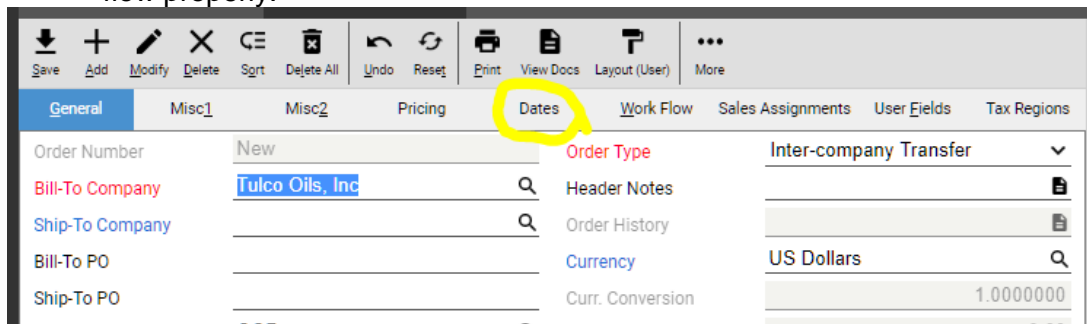**PURPOSE:**

Some of Tulco's customers are defined as Top Off or pre-ship customers. This means Tulco will deliver to the customer before the purchase order is received. These orders will not be invoiced until the purchase order has been entered.

**PROCESS STEPS:**

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



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. **Do not** enter the Customer Purchase Order Number into the Bill-To PO field, and Ship-To PO or a Contact Name
   **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"
        6. Click 'Save' and close
        7. Double-click the newly added Cust.Part Number

c. Enter the Quantity for the part
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 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**: If message about requiring a Bill-To PO #? The Tulco AR Department will need to adjust the Bill-To/Ship-To remove the "PO Required" checkbox.

8. This product will follow the normal shipping process.
9. Each day, review your preview screen that will show the sales orders shipped without a purchase order.
10. Once the PO has been received, click view detail
11. Click Modify Info
12. Enter the Bill-To PO
13. Click Save
14. Exit out of the screen and sales order.
15. This order is now able to be invoiced.

*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 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 | 8/3/18 | Adding Cust. Part Number as 1st step. |
| C | 8/30/18 | Add note RE: header notes |
| D | 12/18/18 | Change CPXR steps |
| E | 4/26/19 | Change notes for deposit = positive/credit = negative |