PURPOSE:
Sales Orders define the <u>items or services</u> 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.

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.
    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 Misc<u>1</u> 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 and **Due to ship** date with same date for all Int'l Customers. (see <u>Int'l Production Standards</u> below)
        Note: Due to ship is the date used to drive demand in MRP and must be filled in for demand to flow properly.
        Note: Confirm the **Due to ship** date when Customer-Carrier/Forwarder BOL is ready.

    <u>Int'l Production Standards</u> for Due to ship date:

10 Business Days	"**Regular**" orders = (less than 10 pallets/Drums, or 4 pallets/Pails)
14 Business Days	"**Large**" orders = (more than 10 pallets/Drums, or 4 pallets/Pails)

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.
        Note: If you do not know the product number, Click Contains button and type description in "Search all columns…" bar
        Note: All applicable Part Numbers have been added to Customer Part Number per Customer.
    b. If Part Number is not present in Customer Part number = **STOP** (See International Sales Dept. Representative)
        Note: International Sales Representative only. See SOP *114_Customer Part Cross Reference* to set pricing for specific products for the Bill-To Customer
    c. Enter the Quantity (based on Sales Unit) for the part, press tab
    d. Confirm the Unit Price from the "Customer's PO" shown is correct.
        Note: If the Unit Price is NOT correct, notify Customer to change PO price and re-submit before changing to the correct price.

e. Add Line Notes to indicate each Customer PO "Line #".

f. Click Next to add additional parts (repeat steps a. through e.)
g. Click Save, and close the 'Edit Sales Order Line' window.

6. Click the User Fields tab and complete Number of Pallets and Measurements [pick list]

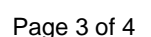7. Click Save – this will generate an order number in the Order Number field
8. Save the Customer PO document to be browsed to in the next steps
9. Attach Customer PO document to Sales Order in deacom…
    a. Click View Docs

    b. Click Add

c. Browse to the File to be attached.

d. Add Description "*Purchase Order*"
e. Click Save

10. << General Order Entry COMPLETE >>
    See *Customer Specific Instructions-Pre-deacom Shipping*
11. Notification of **Customer-Carrier/Forwarder BOL** being received from Customer
12. Edit existing Sales Order
13. Click the User Fields tab and complete each item (from Customer BOL) as needed to appear on deacom documents (Reports): (i.e., Shippers Declaration, etc…)

14. Return to the General tab
15. Click Save
16. << International "Customer Arranged Pickup" >>
    See *Customer Specific Instructions-Post-deacom Shipping*
       a. **Print** Customer-Carrier/Forwarder BOL – **Bill of Lading x 2** (1 – for Truck Driver, & 1 – for Cathy)

    b. **Print** deacom **Sales Pick List**

17. <mark><< International "Customer Arranged Pickup" >></mark>
    See *Customer Specific Instructions-Post-Customer Arranged Truck*

    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 Requirements for "Bill-To PO" & "Ship-To PO"
B	5/10/18	Moved steps to align with other SOPs (Cash Sale)
C	6/14/18	Created for TULCO specific SOP (International/Domestic)
D	7/18/18	Added specifics for "Certificate of Origin" User Fields
E	7/24/18	Add Unit Price=Override Pricing/Customer Part Cross Reference note
F	8/30/18	Note for no more "verbal…" PO#'s
G	9/14/18	Add Cust. Part Cross Reference/Override Pricing steps
H	3/14/19	Add Holding steps and Cust. Specific Instructions
I	3/15/19	More Cust. Specific Instructions
J	3/18/19	More Cust. Specific Instructions
K	3/26/19	More Cust. Specific Instructions
L	3/29/19	More Cust. Specific Instructions
M	7/30/19	Changes made from review through Step 7
N	8/15/19	Changes made from review after Step 7
O	8/16/19	Customer Specific Instructions moved to SOP *315_TULCO_International_Customer Specific Instructions*
P	8/28/19	Changes from review
Q	10/8/19	Changes from review
R	10/14/19	Changes from team review – Order size/Due to ship date & *Customer Specific Instructions*