



Enter Wholesale Order

Description

Use this task to enter a wholesale order in the Wholesale Terminal.

Trigger

Perform this task when a new wholesale order needs to be created.


Prerequisites

There is adequate inventory in stock for wholesale customers.

Helpful Hints

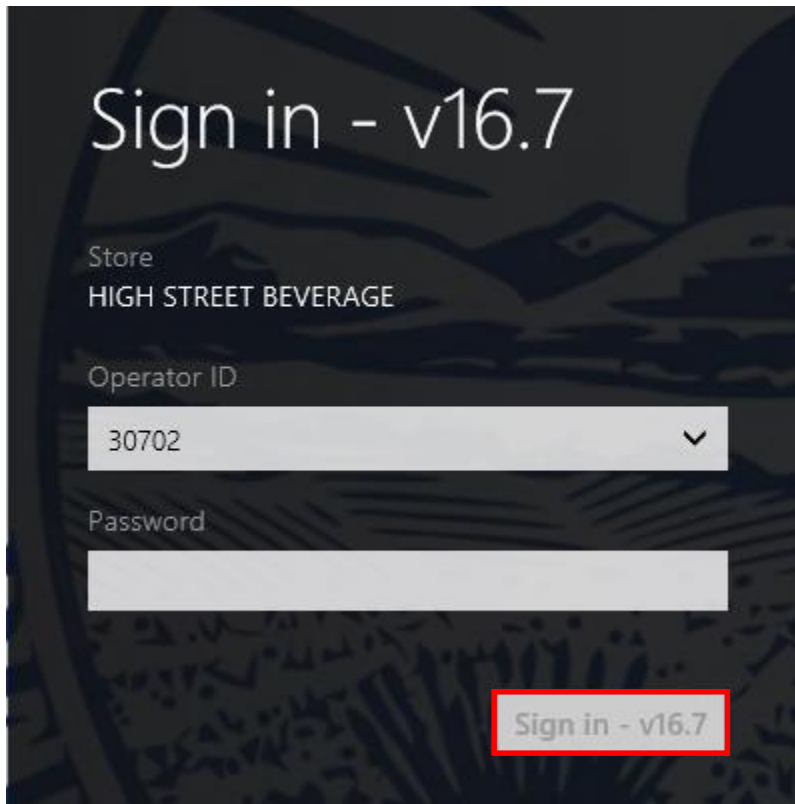
All actions performed in this job aid can be done using the keyboard and mouse.

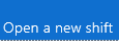
Examples:

- Press  on the Numpad or press "Enter" on your keyboard

Procedure

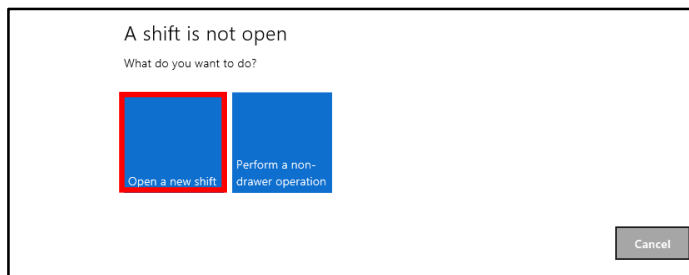
1. Begin this task by signing into the Wholesale Terminal.

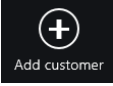


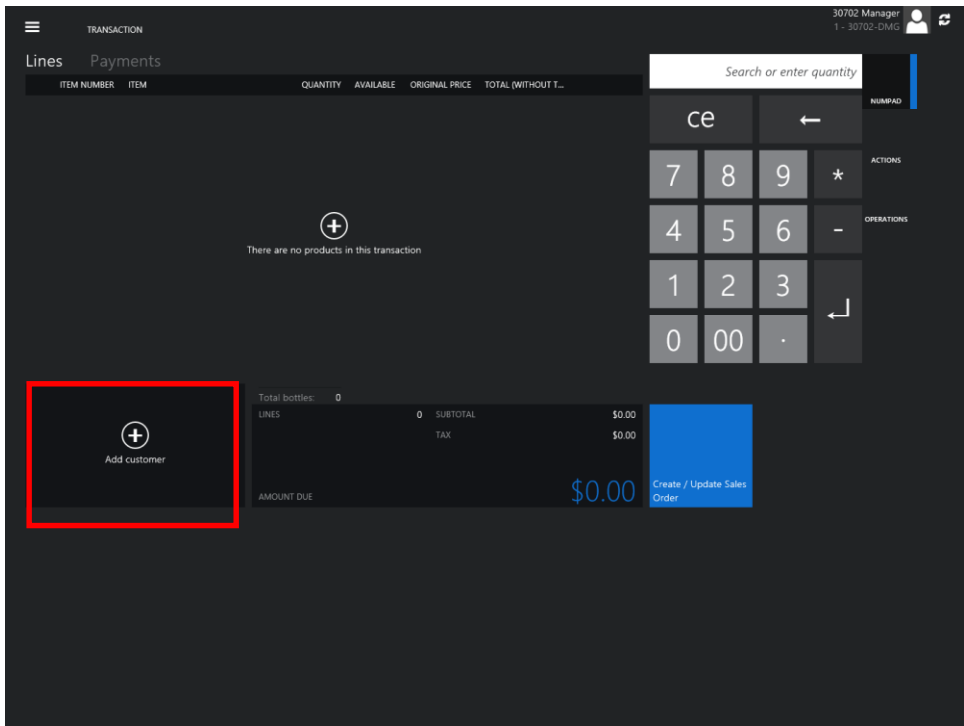
2. Press  to start the shift.



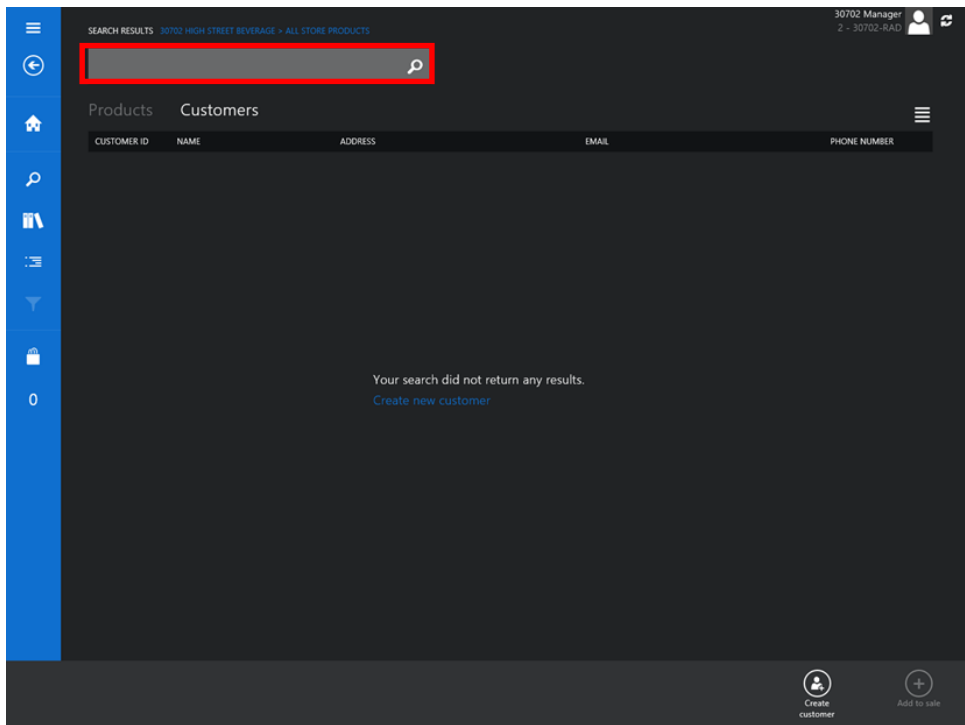
The *Open shift* window will only display if the shift is not already opened.



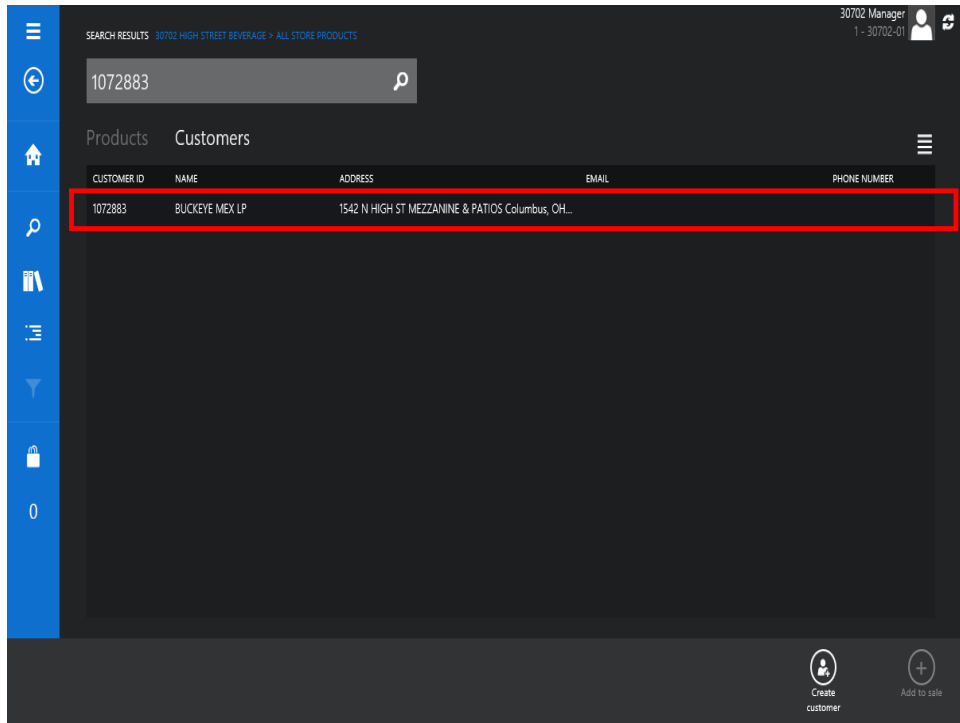
3. Press  to add a customer to the order.




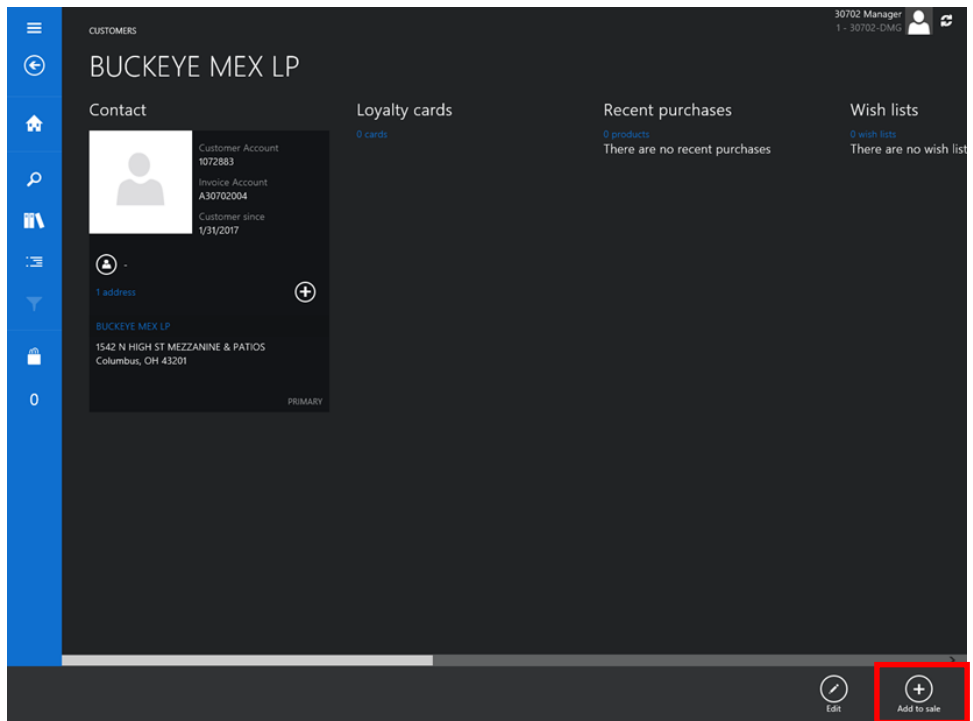
4. Enter the appropriate permit number in the **Search** field. In this example, enter "1072883".



5. Select the appropriate customer record.



6. Press  to add the customer to the sale.



7. Press **Yes** to verify the customer's age.


Verify Customer Date of Birth

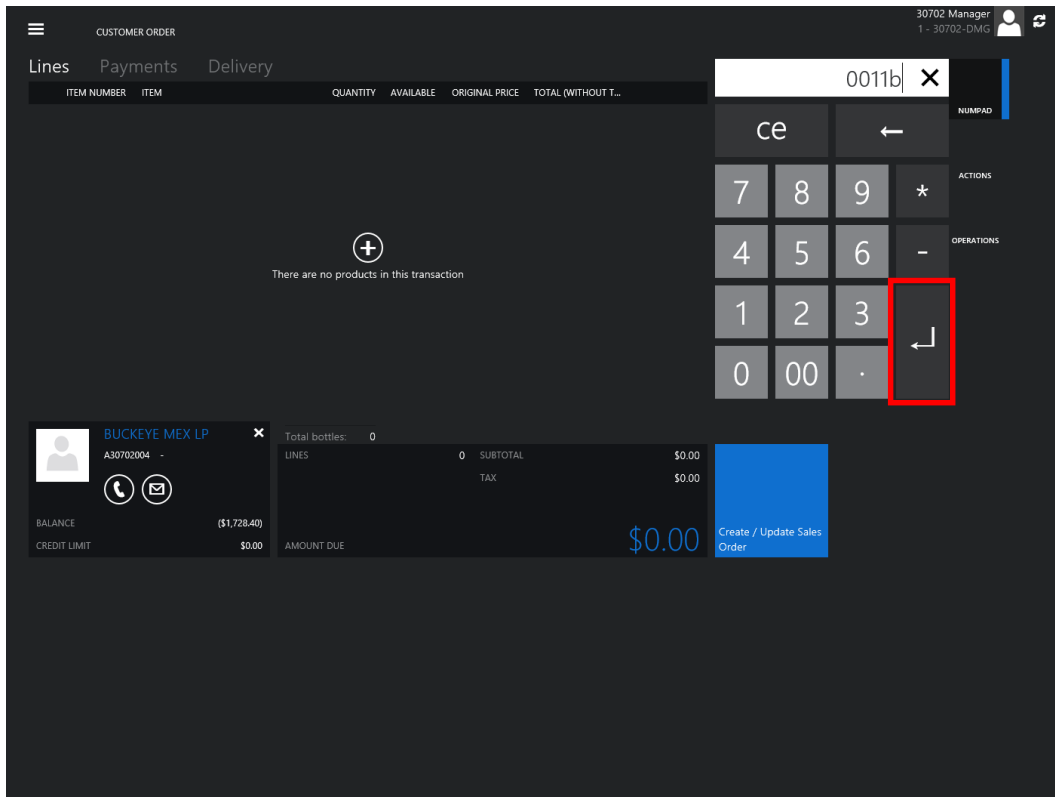
The age limit is 21. Check the customer's ID. The customer must have been born before 3/7/1996.

Yes No

8. Enter the product number in the Numpad. For this example, enter "0011b."

The screenshot shows a POS system interface for a customer order. At the top, it says "CUSTOMER ORDER" and "30702 Manager 1 - 30702-DMG". Below this are tabs for "Lines", "Payments", and "Delivery". A table header is visible with columns: "ITEM NUMBER", "ITEM", "QUANTITY", "AVAILABLE", "ORIGINAL PRICE", and "TOTAL (WITHOUT T...". A red box highlights an empty input field above the numpad. The numpad has a "NUMPAD" label and contains a numeric keypad with a "ce" button, a back arrow, and "ACTIONS" and "OPERATIONS" sections. The main area of the screen displays "There are no products in this transaction" with a plus icon. At the bottom, there is a summary section for "BUCKEYE MEX LP" with a close button. It shows "Total bottles: 0", "LINES 0", "SUBTOTAL \$0.00", "TAX \$0.00", "BALANCE (\$1,728.40)", "CREDIT LIMIT \$0.00", and "AMOUNT DUE \$0.00". A blue button labeled "Create / Update Sales Order" is also present.


9. Press  to add the product to the order.



10. Select a product to update quantities. In this example, select “ANCHO REYES.”

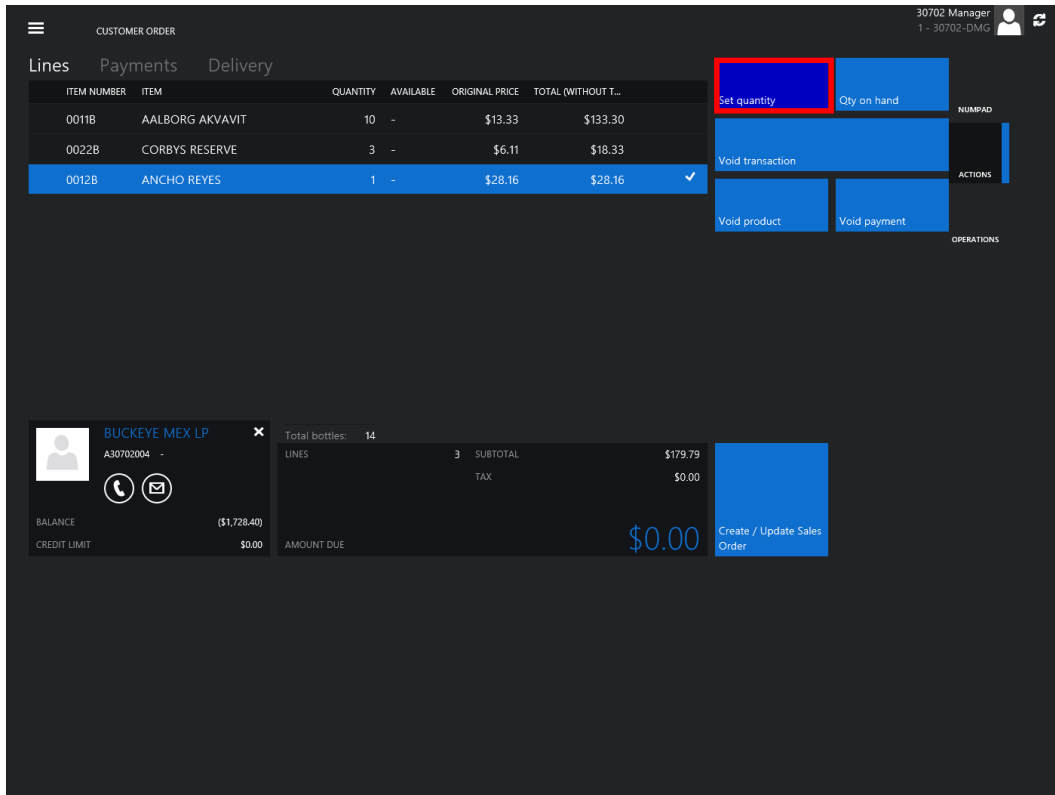
The screenshot shows a 'CUSTOMER ORDER' interface. At the top right, it displays '30702 Manager' and '1 - 30702-DMG'. Below the header are tabs for 'Lines', 'Payments', and 'Delivery'. A search bar contains the text 'ce'. A table lists items with columns for 'ITEM NUMBER', 'ITEM', 'QUANTITY', 'AVAILABLE', 'ORIGINAL PRICE', and 'TOTAL (WITHOUT T...'. The row for '0012B ANCHO REYES' is highlighted in blue and has a checkmark in the right margin. Below the table is a summary section for 'BUCKEYE MEX LP' with a balance of '\$1,728.40' and a credit limit of '\$0.00'. A 'Create / Update Sales Order' button is visible.

ITEM NUMBER	ITEM	QUANTITY	AVAILABLE	ORIGINAL PRICE	TOTAL (WITHOUT T...
0011B	AALBORG AKVAVIT	10	-	\$13.33	\$133.30
0022B	CORBYS RESERVE	3	-	\$6.11	\$18.33
0012B	ANCHO REYES	1	-	\$28.16	\$28.16

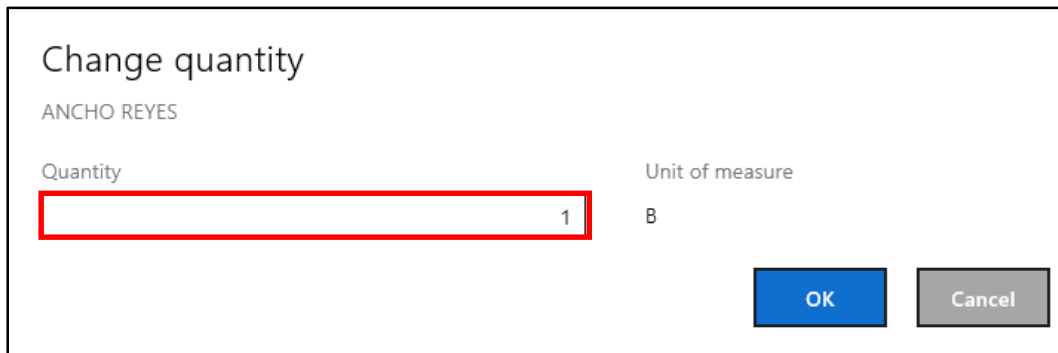
11. Press  to update the quantities.

This screenshot is identical to the previous one, but the 'ACTIONS' button on the right side of the interface is highlighted with a red box. The 'ANCHO REYES' row remains selected in the table.

12. Press **Set quantity** to update the quantity.



13. Enter a quantity in the **Quantity** field. In this example, enter "10."



14. Press **OK** to add the quantity to the product.



15. Press **Qty on hand**.



This available quantity excludes items on open wholesale orders. This is more representative of the available quantity to sell. The **Inventory lookup** button lists physical inventory since it includes quantities on open orders.

The screenshot displays a 'CUSTOMER ORDER' interface. At the top, there are tabs for 'Lines', 'Payments', and 'Delivery'. The 'Lines' tab is active, showing a table with the following data:

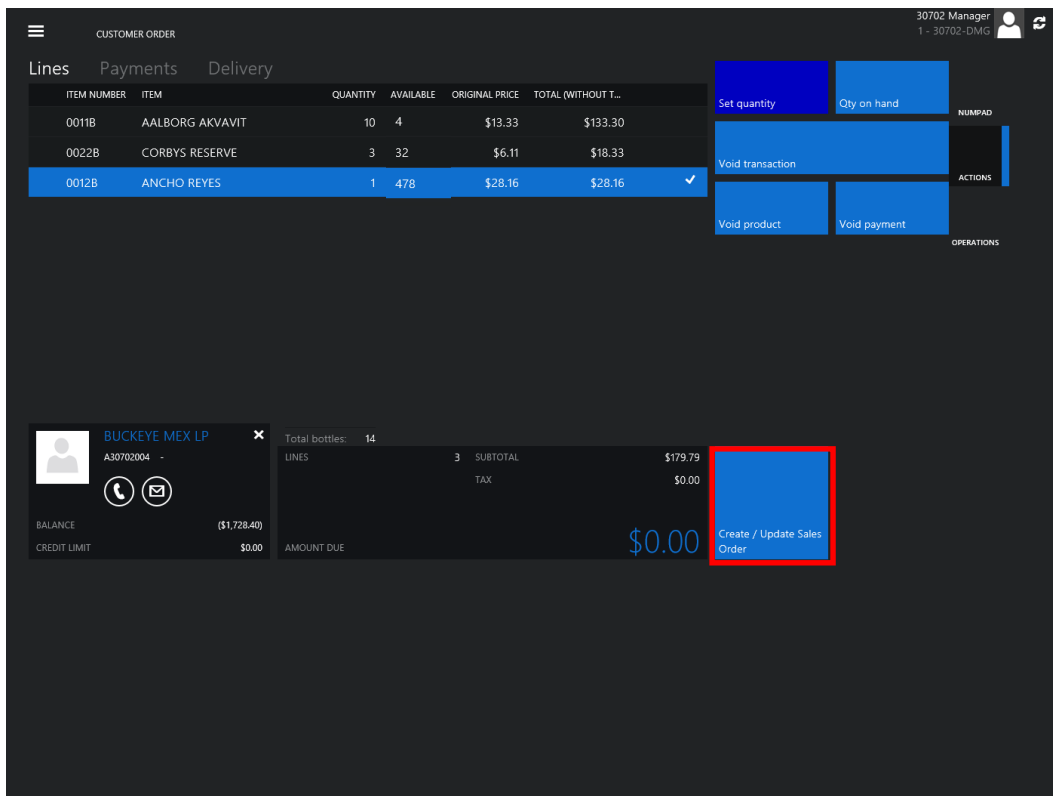
ITEM NUMBER	ITEM	QUANTITY	AVAILABLE	ORIGINAL PRICE	TOTAL (WITHOUT T...
0011B	AALBORG AKVAVIT	10	4	\$13.33	\$133.30
0022B	CORBYS RESERVE	3	32	\$6.11	\$18.33
0012B	ANCHO REYES	1	478	\$28.16	\$28.16

On the right side of the interface, there are several action buttons: 'Set quantity', 'Qty on hand' (highlighted with a red box), 'Void transaction', 'Void product', and 'Void payment'. Below the table, there is a summary card for 'BUCKEYE MEX LP' with the following details:

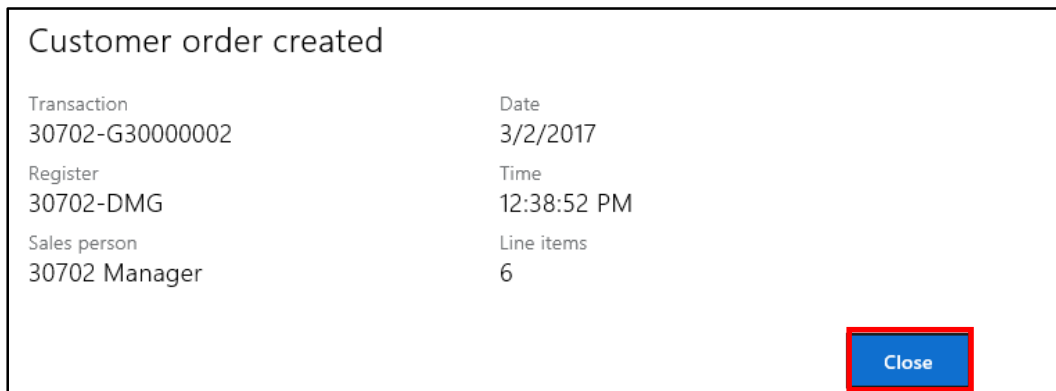
- Total bottles: 14
- LINES: 3
- SUBTOTAL: \$179.79
- TAX: \$0.00
- AMOUNT DUE: \$0.00

Additional information includes 'BALANCE (\$1,728.40)' and 'CREDIT LIMIT \$0.00'. A 'Create / Update Sales Order' button is also visible.

16. Press **Create / Update Sales Order** after adding all products to the order. The receipt will print.



17. Press **Close** to complete this task.



Results

You have entered a wholesale order.