



Enter Wholesale Order for Transient Customer

Description

Use this task to enter a wholesale order for a transient customer.


Trigger

Perform this task when a transient customer needs to place a wholesale order.

Prerequisites

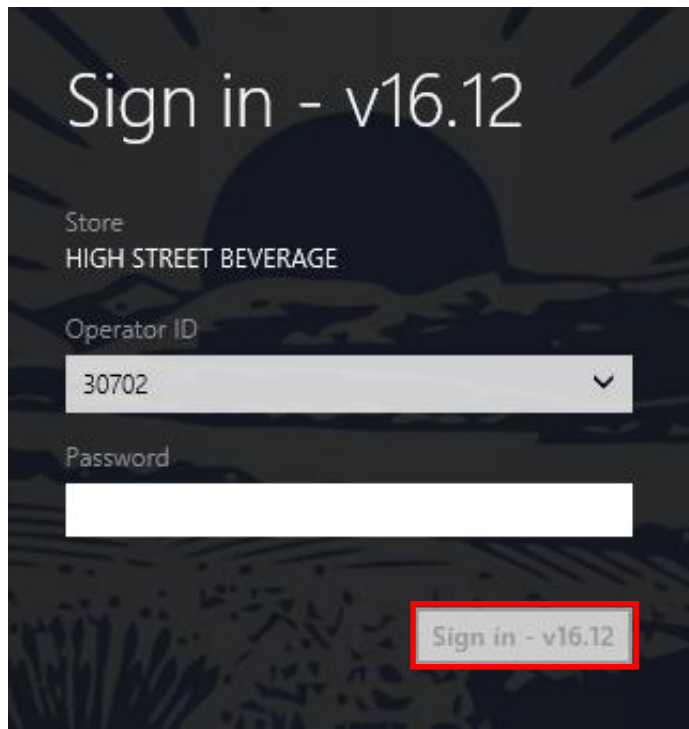
Transient customer exists in the system.

Helpful Hints

- This procedure is similar to entering an order for an assigned customer except that **Permit Number**, **DBA Name** and **Permit Expiration Date** are additional fields to be entered.
- The account for Transient customers start with a “T” followed by your store number and additional numbers.
- All actions performed in this job aid can be done using the keyboard and mouse.
Examples:
 - Press  on Numpad or press the “Enter” on the keyboard

Procedure

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



Sign in - v16.12


Store
HIGH STREET BEVERAGE

Operator ID
30702

Password

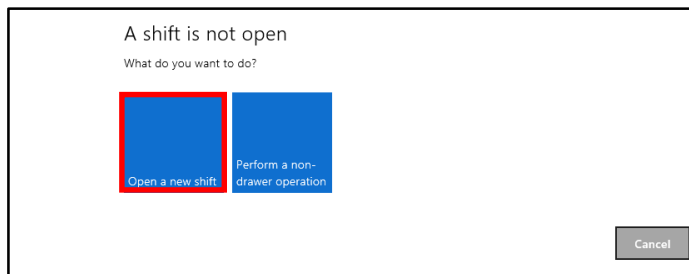
Sign in - v16.12

The image shows a sign-in screen with a dark background and a light-colored sun/moon graphic. The text 'Sign in - v16.12' is at the top. Below it, the store name 'HIGH STREET BEVERAGE' is displayed. There are two input fields: 'Operator ID' with the value '30702' and a dropdown arrow, and 'Password' which is empty. A 'Sign in - v16.12' button is highlighted with a red box at the bottom right.



2. Press  to start the shift.



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



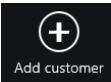
A shift is not open
What do you want to do?

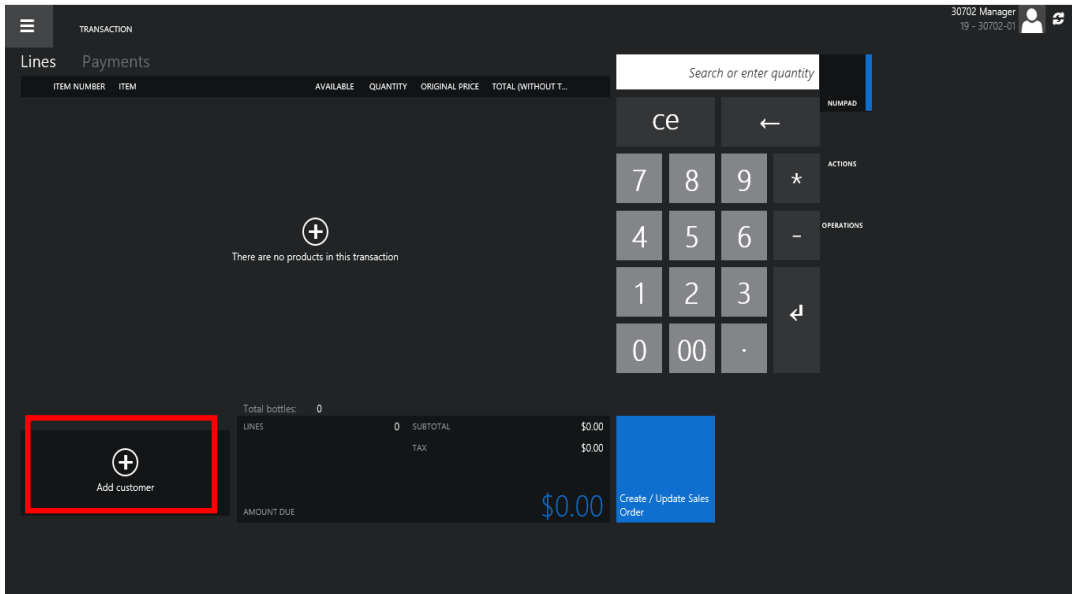
 

Open a new shift Perform a non-drawer operation

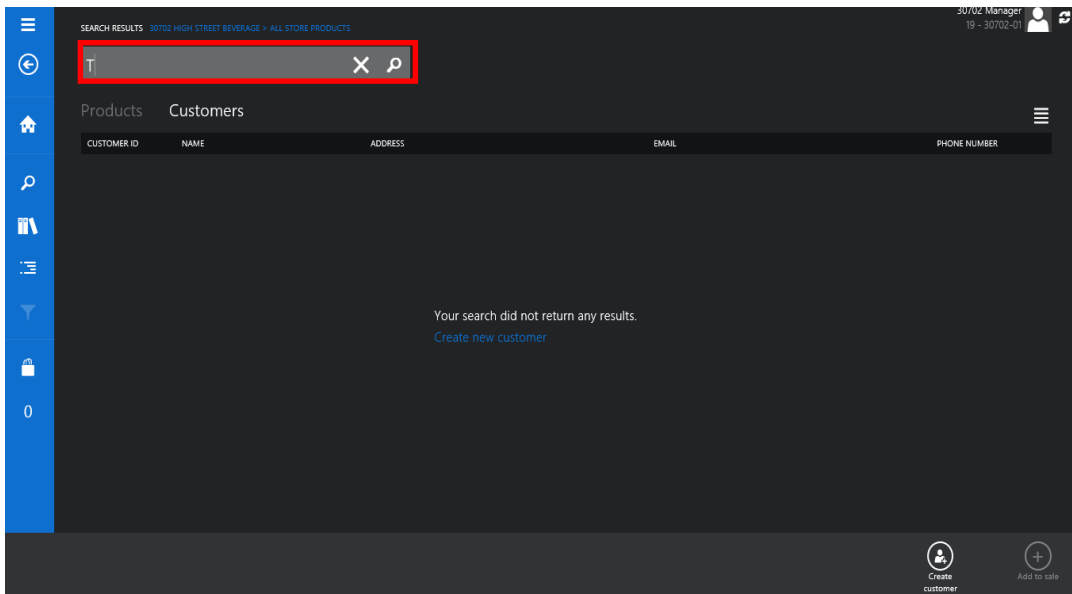
Cancel

The image shows a dialog box with a white background and a black border. The text 'A shift is not open' is at the top, followed by 'What do you want to do?'. Below this are two blue buttons: 'Open a new shift' (highlighted with a red box) and 'Perform a non-drawer operation'. A 'Cancel' button is located at the bottom right.

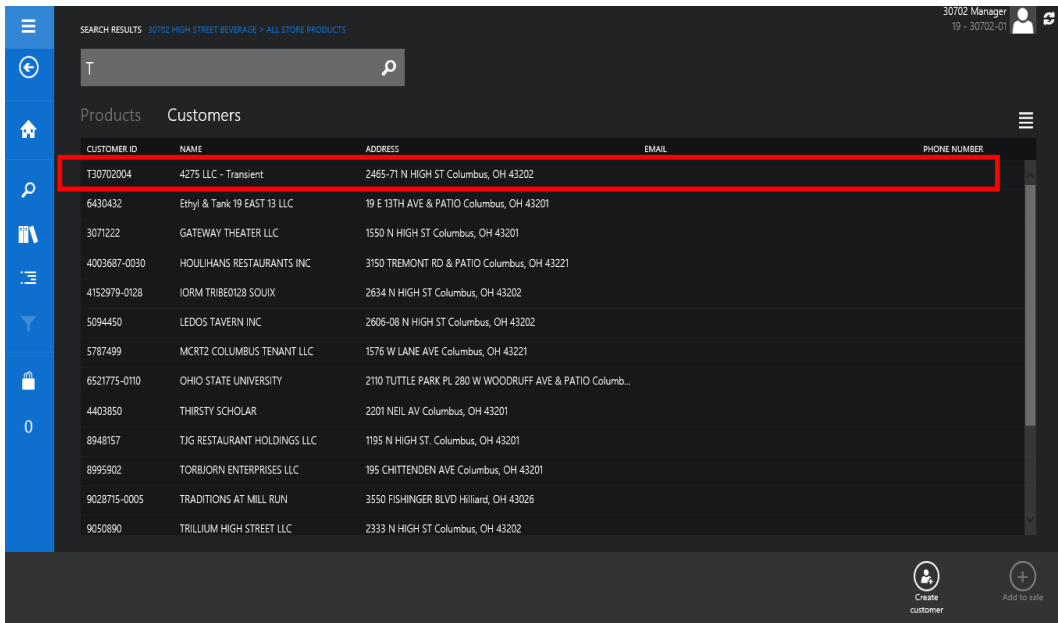
3. Click  to add the customer to order.




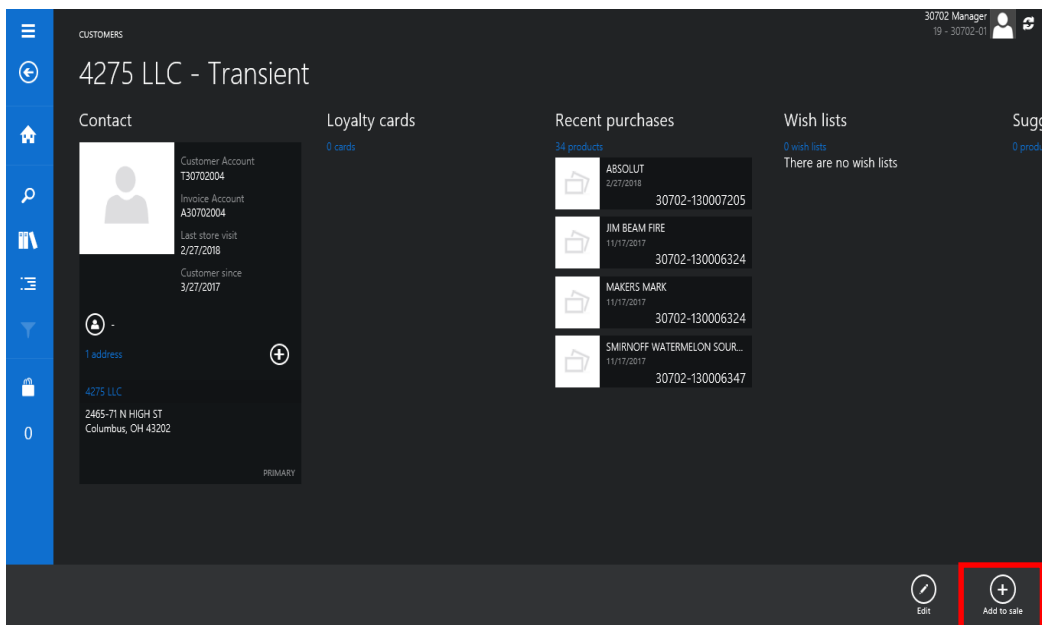
4. Search for the transient customer in the **Search** field by entering part of the transient customer number. In this example, enter "T."



5. Select the appropriate transient customer. In this example, select “4275 LLC.” Transient.”



6. Select  to add the transient account to the order.



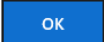
7. Press after verifying the age of the customer.

Verify Customer Date of Birth



The age limit is 21. Check the customer's ID. The customer must have been born before 2/27/1997.

8. Enter the permit number in the **Enter Permit Number** field. In this example, enter "1234567890123" and press .

Enter Permit Number




9. Enter the Doing Business As (DBA) name in the **DBA Name** field. For this example, enter “Joe’s Liquor Shack”, then press .


Enter DBA Name

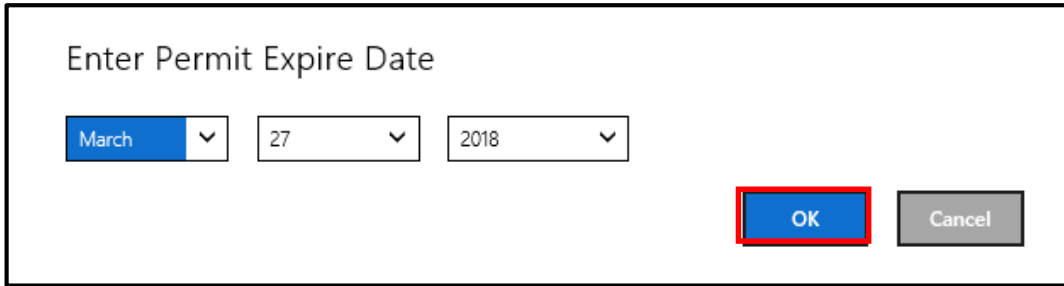
10. Enter the month, date, and year in the **Enter Permit Expire Date** field. In this example enter “March 27, 2018”.

Enter Permit Expire Date

11. Press  .

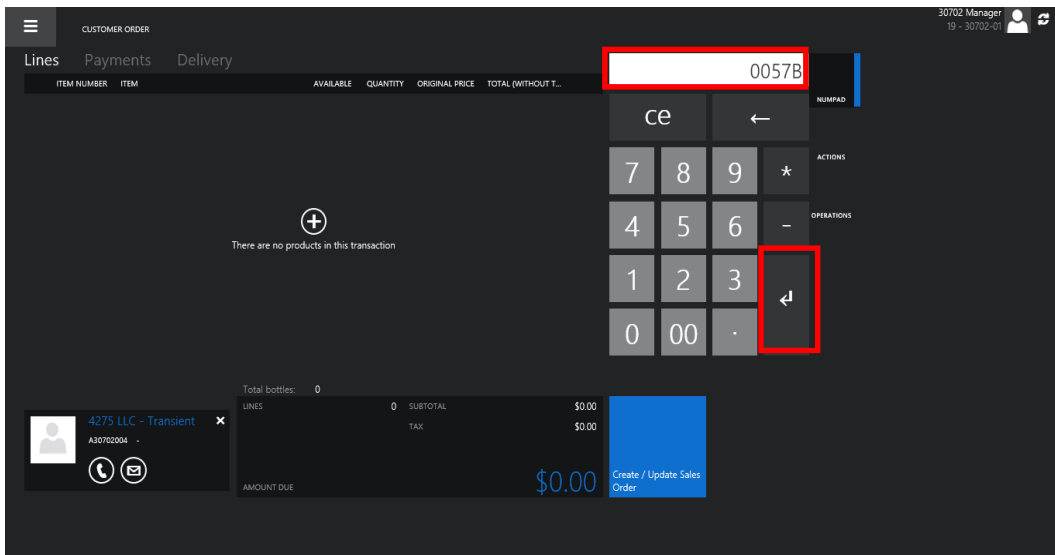


12. Enter the product number or name in the **Numpad** field. For this example, enter "0057B."

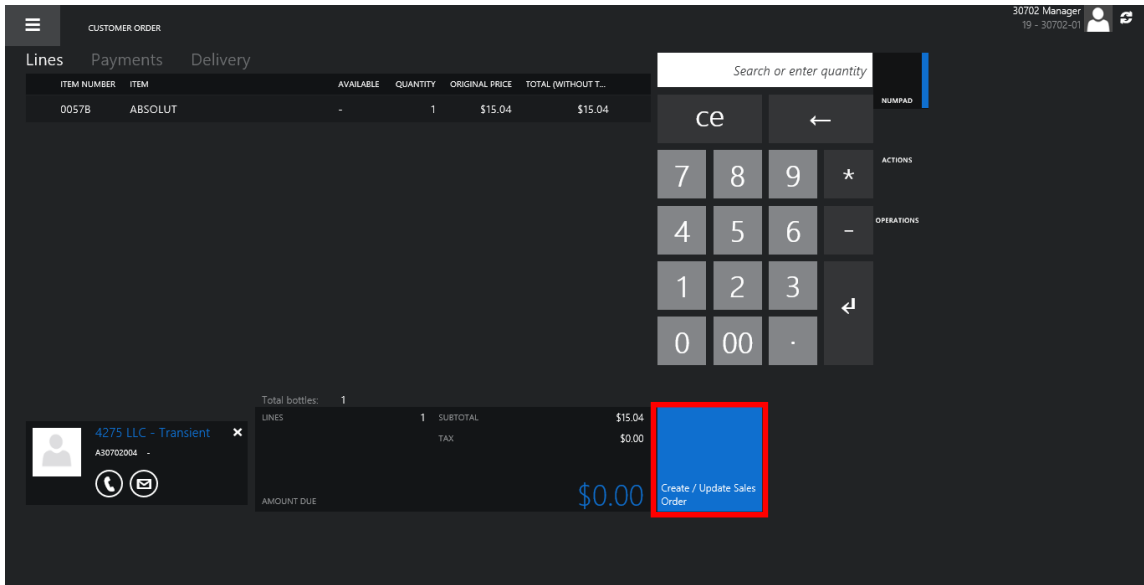
13. Press  .



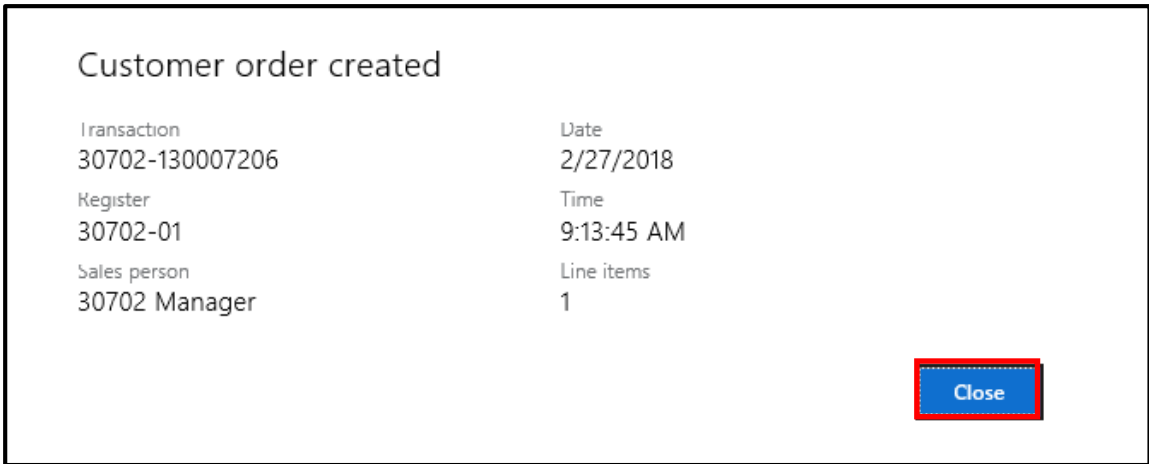
Repeat Steps 12 and 13 to enter additional items on the order.



14. Press **Create / Update Sales Order** after adding all necessary products to the order.



15. Press **Close** to finish the order and complete this task.



Results

You have entered a wholesale order for a transient customer.