



Update Wholesale Order

Description

Use this task to update a wholesale order. Only orders that have not been invoiced can be updated.


Trigger

Perform this task when a wholesale order needs to be updated.

Prerequisites

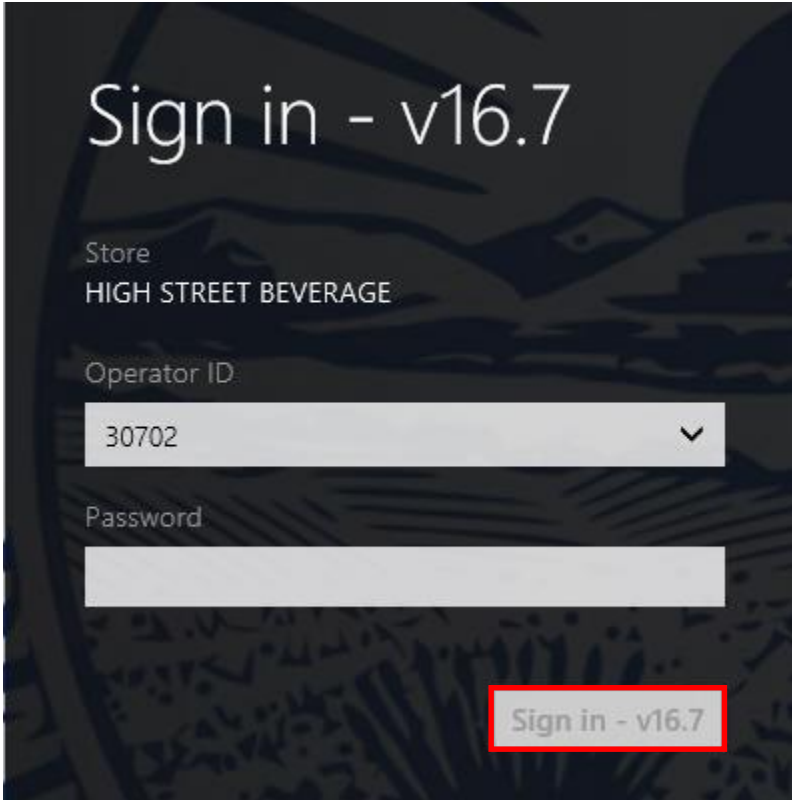
There are created wholesale orders in the system that have not been invoiced.

Helpful Hints

- This job aid shows how to update a wholesale order. There are several methods to update an order:
 - Add item by Number
 - Add item by Name
 - Change Quantity
 - Delete item
 - Verify by quantity, number of bottles, extended prices, and sales taxes
- All actions performed in this job aid can be done using the touch screen or keyboard. Examples:
 - Press  on Numpad or press “Enter” on the keyboard

Procedure

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



Sign in - v16.7

Store
HIGH STREET BEVERAGE

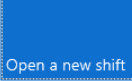
Operator ID

30702

Password

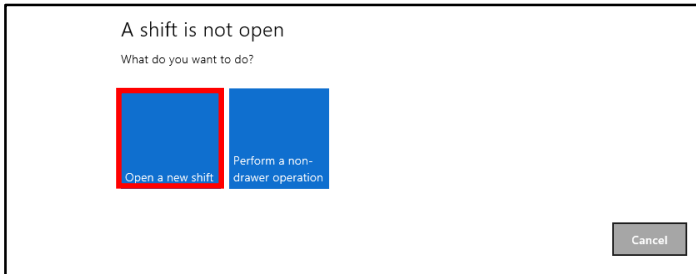
Sign in - v16.7

The image shows a sign-in screen for version v16.7. It includes a store name 'HIGH STREET BEVERAGE', an operator ID dropdown menu with '30702' selected, and a password field. A red box highlights the 'Sign in - v16.7' button 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?

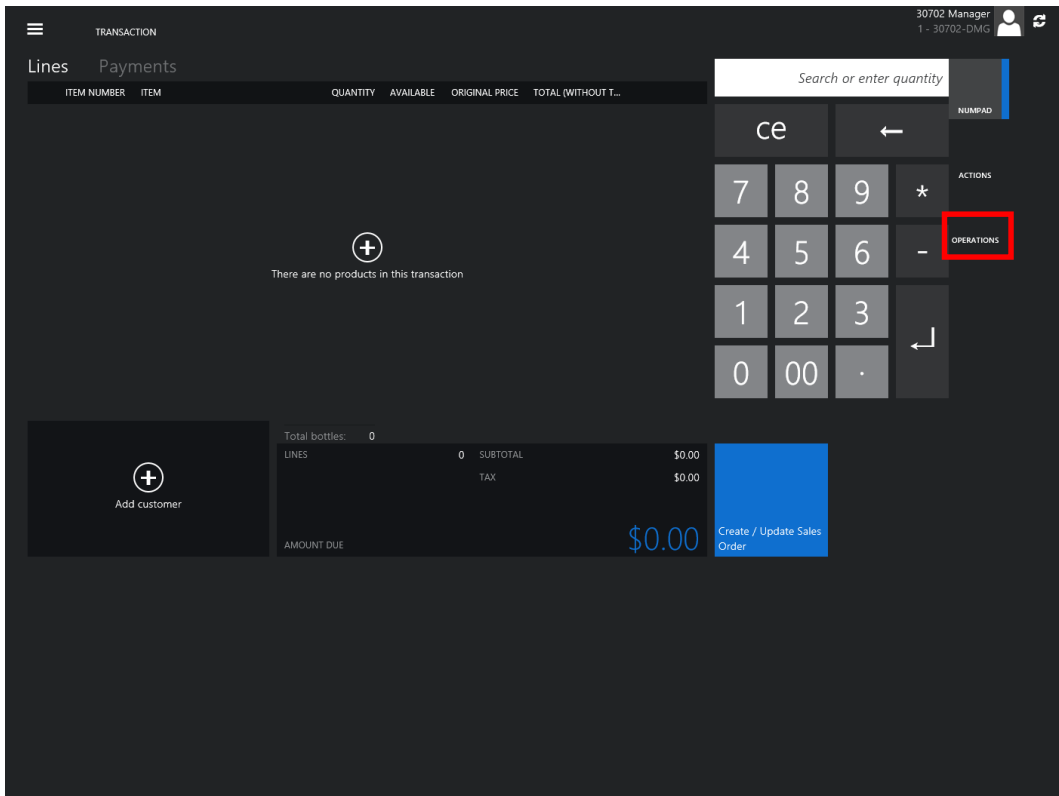
Open a new shift

Perform a non-drawer operation

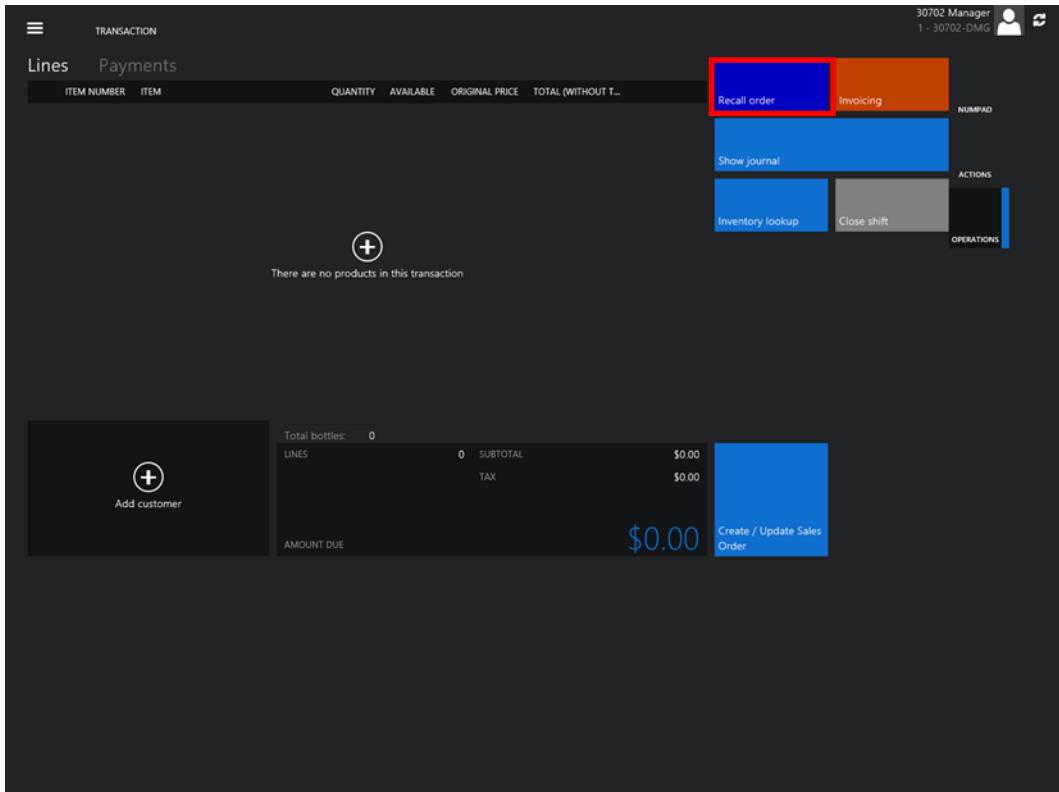
Cancel

The image shows a dialog box titled 'A shift is not open' with the question 'What do you want to do?'. It contains two blue buttons: 'Open a new shift' (highlighted with a red border) and 'Perform a non-drawer operation'. A 'Cancel' button is located at the bottom right.

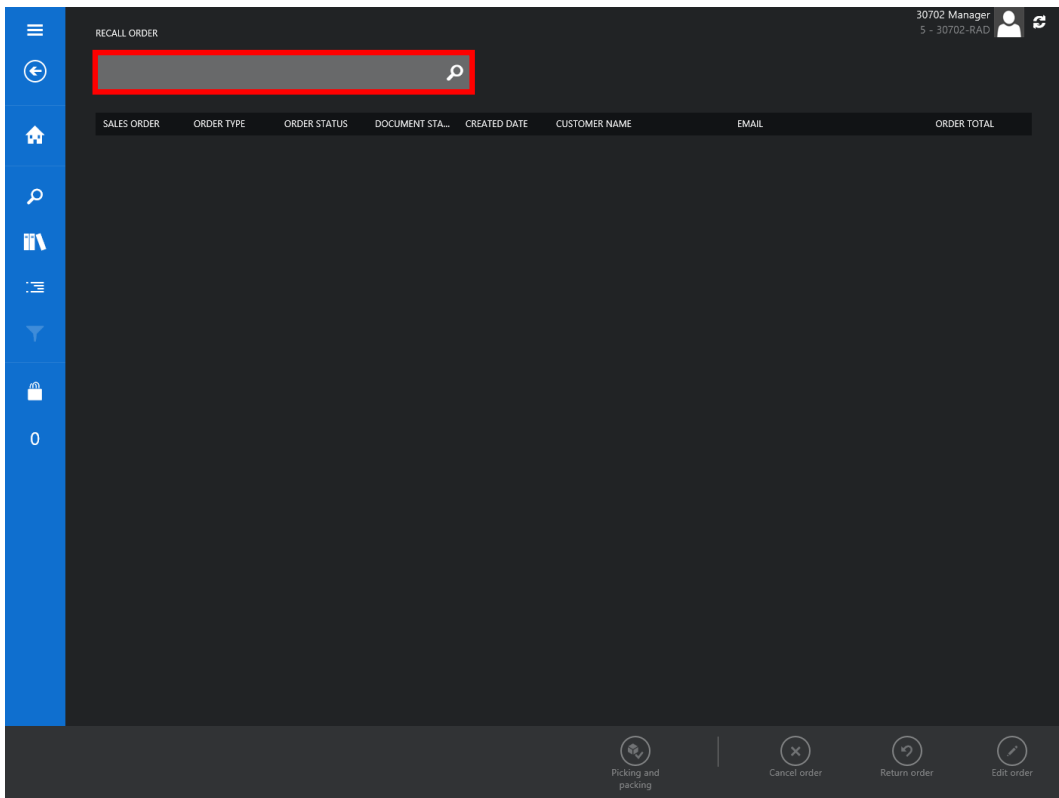
3. Press **OPERATIONS** to display the operations options.



4. Press **Recall order**.



5. Enter the permit number in the search field. In this example, enter “1072883.”



6. Select the appropriate order to be updated. In this example, select "DSO000502016."

RECALL ORDER

30702 Manager
14 - 30702-01

1072883

SALES ORDER	ORDER TYPE	ORDER STATUS	DOCUMENT STATUS	CREATED DATE	CUSTOMER NAME	EMAIL	ORDER TOTAL
DSO000502016	Customer Order	Created	Created	12/19/2017	BUCKEYE MEX LP		\$468.62 ✓
DSO000429406	Customer Order	Invoiced	Invoiced	11/30/2017	BUCKEYE MEX LP		\$1,679.52
DSO000400667	Customer Order	Invoiced	Invoiced	11/16/2017	BUCKEYE MEX LP		\$1,725.00
DSO000380152	Customer Order	Invoiced	Invoiced	11/6/2017	BUCKEYE MEX LP		\$1,553.07
DSO000367014	Customer Order	Invoiced	Invoiced	10/30/2017	BUCKEYE MEX LP		\$1,699.25
DSO000355773	Customer Order	Invoiced	Invoiced	10/24/2017	BUCKEYE MEX LP		\$2,580.65
DSO000323913	Customer Order	Invoiced	Invoiced	10/9/2017	BUCKEYE MEX LP		\$1,984.28
DSO000319497	Customer Order	Invoiced	Invoiced	10/6/2017	BUCKEYE MEX LP		\$750.12
DSO000298340	Customer Order	Invoiced	Invoiced	9/28/2017	BUCKEYE MEX LP		\$1,143.19
DSO000277522	Customer Order	Invoiced	Invoiced	9/18/2017	BUCKEYE MEX LP		\$1,521.48

Picking and packing | Cancel order | Return order | Edit order

7. Press  to edit the order.

RECALL ORDER

30702 Manager
14 - 30702-01

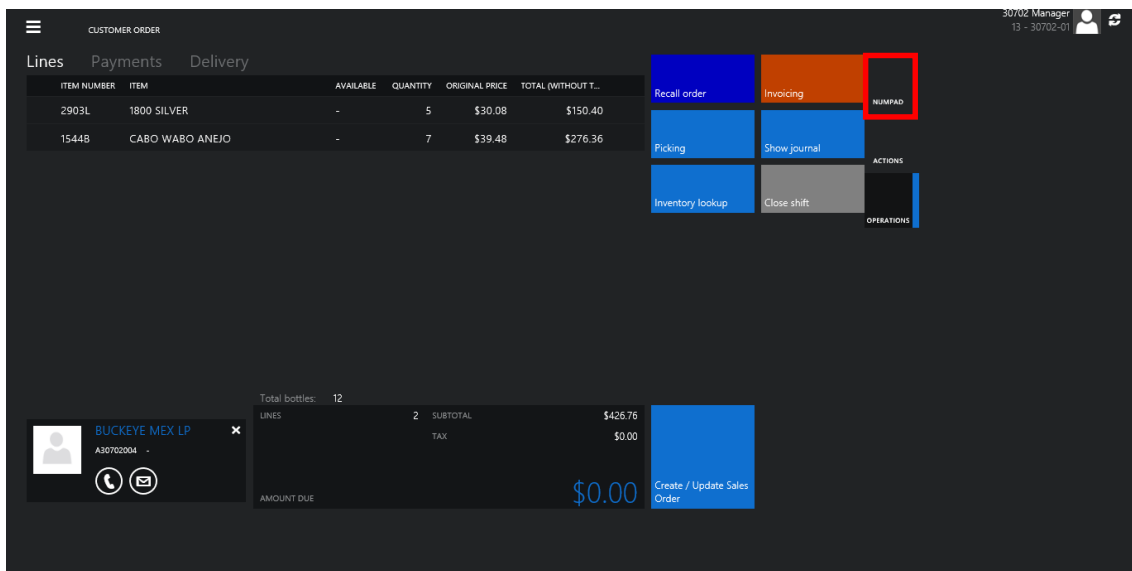
1072883

SALES ORDER	ORDER TYPE	ORDER STATUS	DOCUMENT STATUS	CREATED DATE	CUSTOMER NAME	EMAIL	ORDER TOTAL
DSO000502016	Customer Order	Created	Created	12/19/2017	BUCKEYE MEX LP		\$468.62 ✓
DSO000429406	Customer Order	Invoiced	Invoiced	11/30/2017	BUCKEYE MEX LP		\$1,679.52
DSO000400667	Customer Order	Invoiced	Invoiced	11/16/2017	BUCKEYE MEX LP		\$1,725.00
DSO000380152	Customer Order	Invoiced	Invoiced	11/6/2017	BUCKEYE MEX LP		\$1,553.07
DSO000367014	Customer Order	Invoiced	Invoiced	10/30/2017	BUCKEYE MEX LP		\$1,699.25
DSO000355773	Customer Order	Invoiced	Invoiced	10/24/2017	BUCKEYE MEX LP		\$2,580.65
DSO000323913	Customer Order	Invoiced	Invoiced	10/9/2017	BUCKEYE MEX LP		\$1,984.28
DSO000319497	Customer Order	Invoiced	Invoiced	10/6/2017	BUCKEYE MEX LP		\$750.12
DSO000298340	Customer Order	Invoiced	Invoiced	9/28/2017	BUCKEYE MEX LP		\$1,143.19
DSO000277522	Customer Order	Invoiced	Invoiced	9/18/2017	BUCKEYE MEX LP		\$1,521.48


Picking and packing | Cancel order | Return order | Edit order

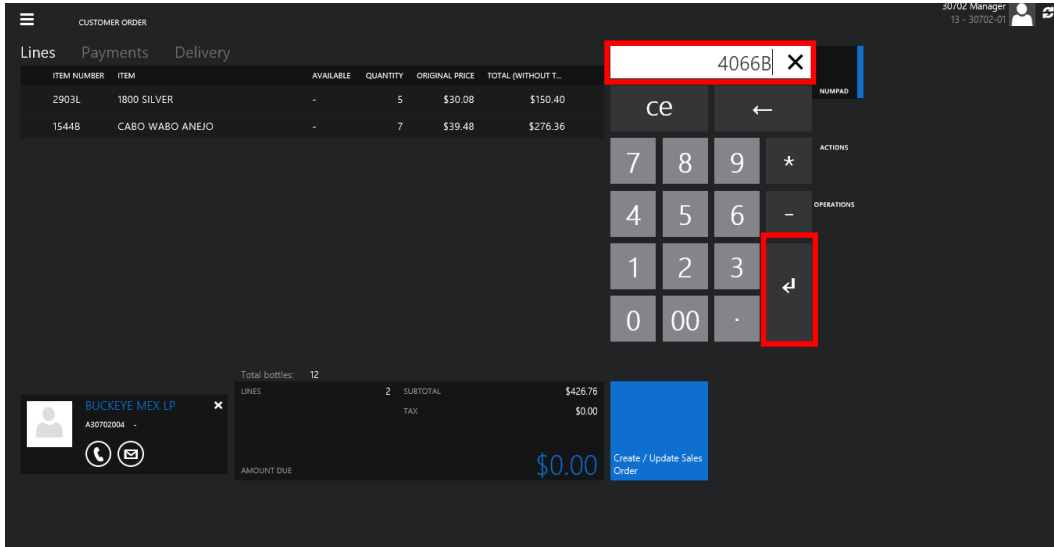
8.	To do the following:	Go To:
	Add an item by number to an order	Step 9
	Add an item by description to an order	Step 13
	Change an item quantity on an order	Step 18
	Delete an item from an order	Step 24
	Complete the order changes	Step 26

9. Press **NUMPAD** tab to enter the item number.

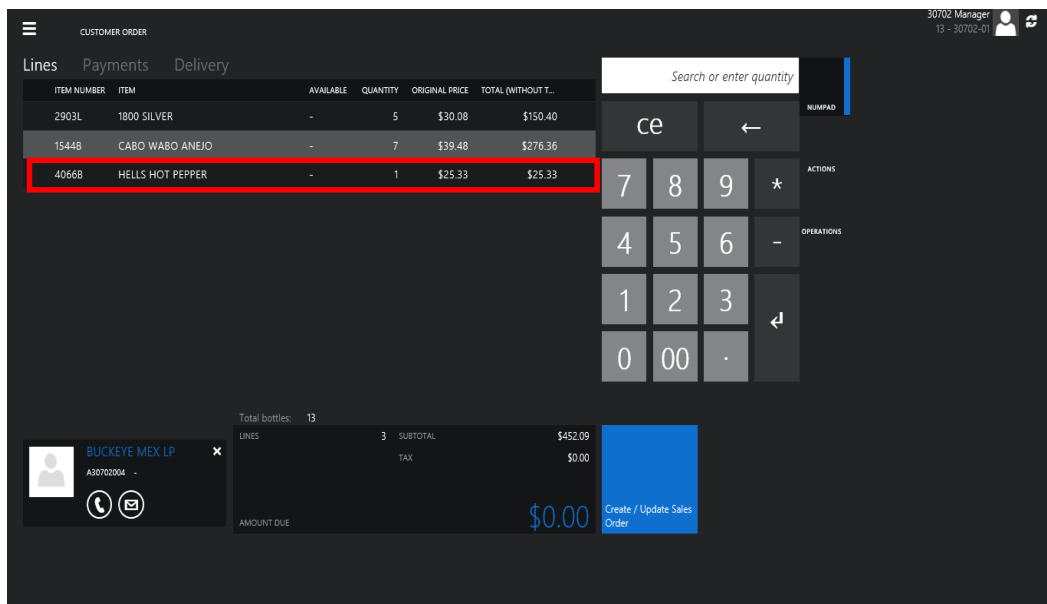


10. Enter the item number. In this example enter “4066B.”

11. Click  to add the entered item number.




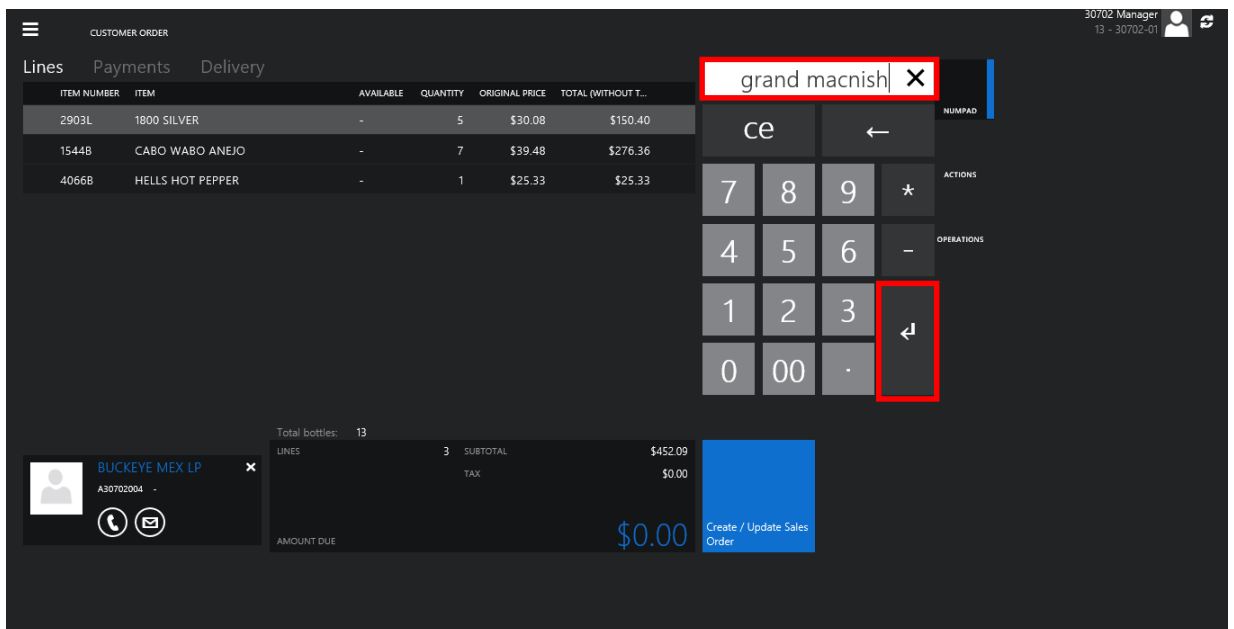
The item is added to the order with a quantity of “1”.



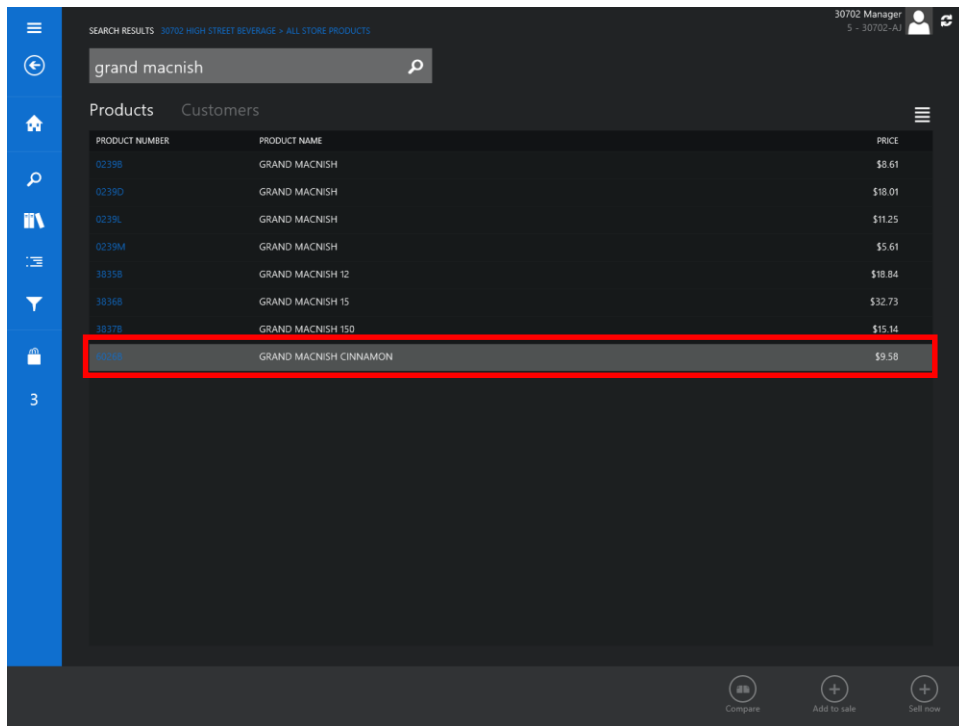
12.	To do the following:	Go To:
	Add an item by description to an order	Step 13
	Change an item quantity on an order	Step 18
	Delete an item from an order	Step 24
	Complete the order changes	Step 26

13. Enter the item description name in the search field. In this example enter “grand macnish.”

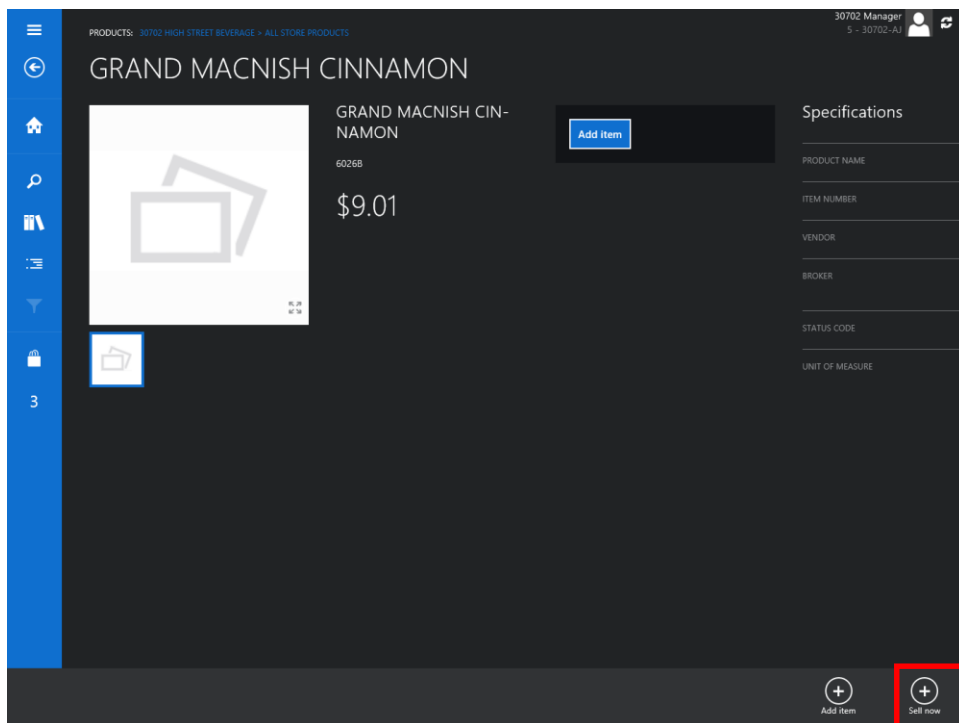
14. Click  to search for the entered description name.



15. Select the appropriate item from the list. In this example, select “grand macnish cinnamon.”



16. Press  to add the item to the order.





The item has been added to the order with a quantity of “1”.

30702 Manager
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CUSTOMER ORDER

Lines Payments Delivery

ITEM NUMBER	ITEM	AVAILABLE	QUANTITY	ORIGINAL PRICE	TOTAL (WITHOUT T...
2903L	1800 SILVER	-	5	\$30.08	\$150.40
1544B	CABO WABO ANEJO	-	7	\$39.48	\$276.36
4066B	HELLS HOT PEPPER	-	1	\$25.33	\$25.33
6026B	GRAND MACNISH CINNAMON	-	1	\$9.01	\$9.01

Search or enter quantity

NUMPAD

ACTIONS

OPERATIONS

Total bottles: 14

BUCKEYE MEX LP
A30702004

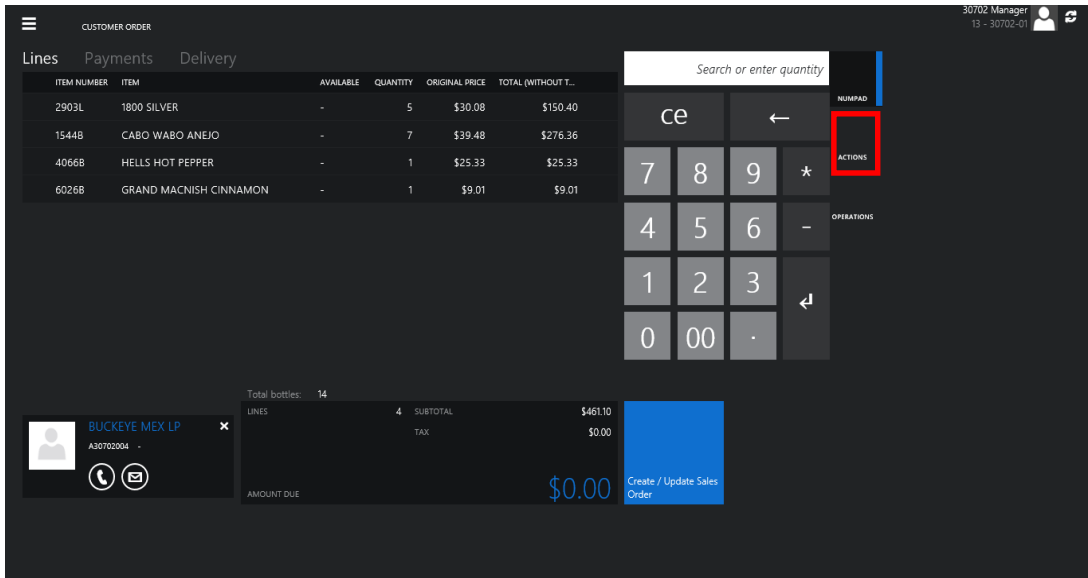
LINES	4	SUBTOTAL	\$461.10
		TAX	\$0.00
AMOUNT DUE			\$0.00

Create / Update Sales Order

17.

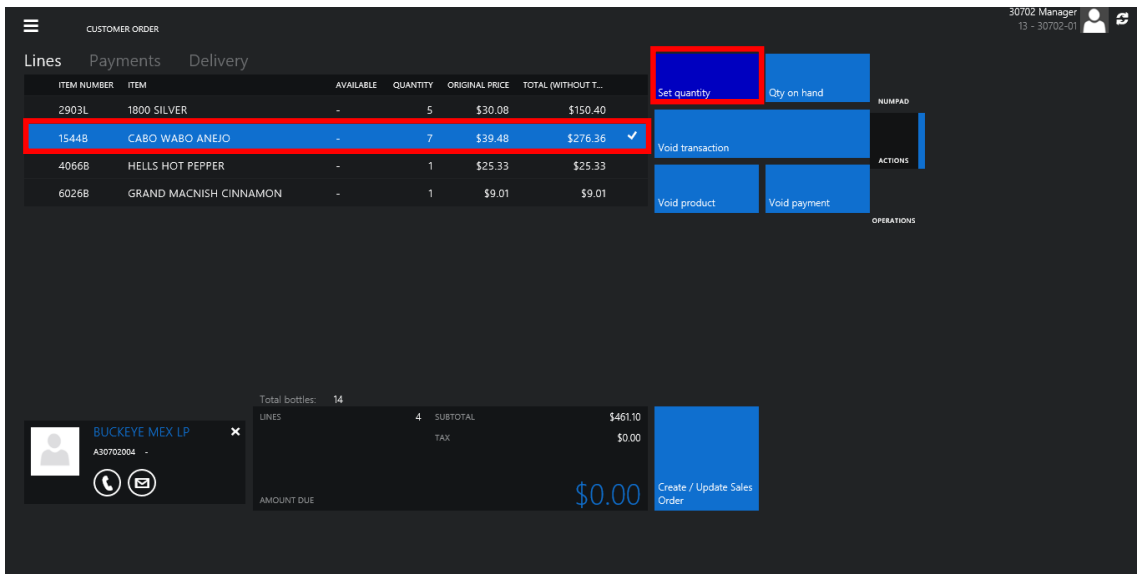
To do the following:	Go To:
Change an item quantity on an order	Step 18
Delete an item from an order	Step 24
Complete the order changes	Step 26

18. Press **ACTIONS**.



19. Select the appropriate line item. In this example it is the line for item 1544B.

20. Press **Set quantity** to change the quantity.



21. Enter the quantity desired in the **Quantity** field. In this example, enter “11.”

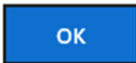
Change quantity
CABO WABO ANEJO

Quantity: X

Unit of measure: B

OK Cancel

22. Press



Change quantity
CABO WABO ANEJO

Quantity: X

Unit of measure: B

OK Cancel



The quantity on the item has been changed to “11” on the order.

CUSTOMER ORDER

30702 Manager
13 - 30702-01

ITEM NUMBER	ITEM	AVAILABLE	QUANTITY	ORIGINAL PRICE	TOTAL (WITHOUT T...
2903L	1800 SILVER	-	5	\$30.08	\$150.40
1544B	CABO WABO ANEJO	-	11	\$39.48	\$434.28
4066B	HELLS HOT PEPPER	-	1	\$25.33	\$25.33
6026B	GRAND MACNISH CINNAMON	-	1	\$9.01	\$9.01

Set quantity Qty on hand NUMPAD

Void transaction ACTIONS

Void product Void payment OPERATIONS

Total bottles: 18

BUCKEYE MEX LP
A30702004

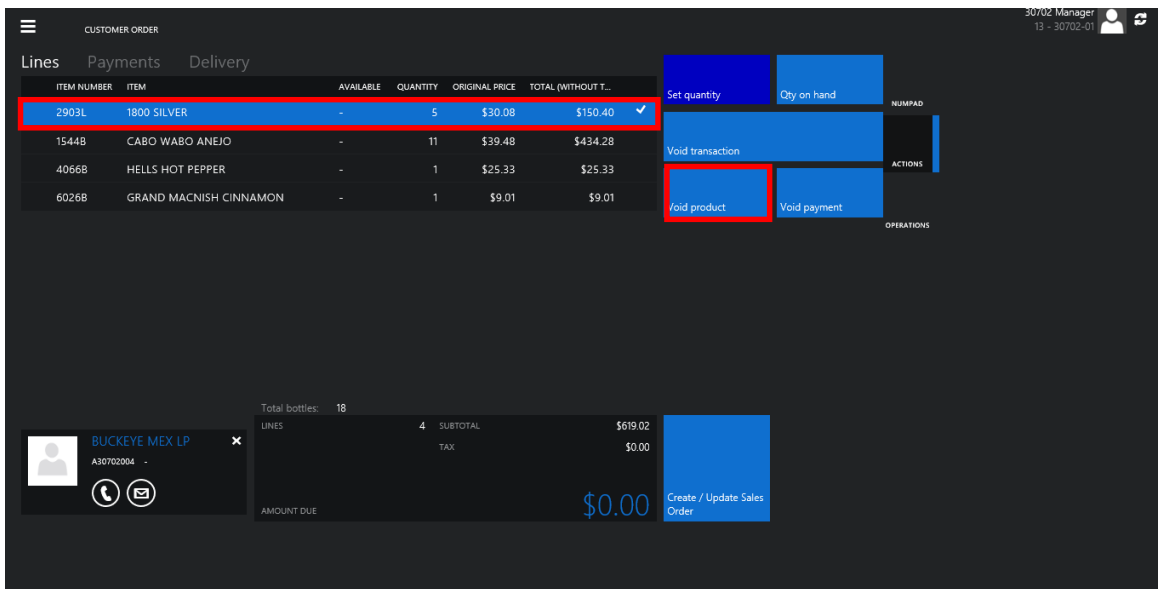
4 LINES SUBTOTAL \$619.02
TAX \$0.00

AMOUNT DUE \$0.00 Create / Update Sales Order

23.	To do the following:	Go To:
	Delete an item from an order	Step 24
	Complete the order changes	Step 26

24. Select the appropriate item. In this example select “item 2903L.”

25. Press **Void product** to delete the item.





A strike through appears on the line. The line will disappear after the order is saved.

The screenshot shows a 'CUSTOMER ORDER' interface. At the top, there are tabs for 'Lines', 'Payments', and 'Delivery'. The main area contains a table with the following data:

ITEM NUMBER	ITEM	AVAILABLE	QUANTITY	ORIGINAL PRICE	TOTAL (WITHOUT T...
2903L	1800-SILVER	-	5	\$30.08	\$150.40
1544B	CABO WABO ANEJO	-	11	\$39.48	\$434.28
4066B	HELLS HOT PEPPER	-	1	\$25.33	\$25.33
6026B	GRAND MACNISH CINNAMON	-	1	\$9.01	\$9.01

Below the table, there is a summary section with the following information:

- Total bottles: 13
- BUCKEYE MEX LP (A30702004)
- 3 LINES
- 3 SUBTOTAL: \$468.62
- TAX: \$0.00
- AMOUNT DUE: \$0.00

Buttons for 'Set quantity', 'Qty on hand', 'Void transaction', 'Void product', 'Void payment', and 'Create / Update Sales Order' are visible on the right side.

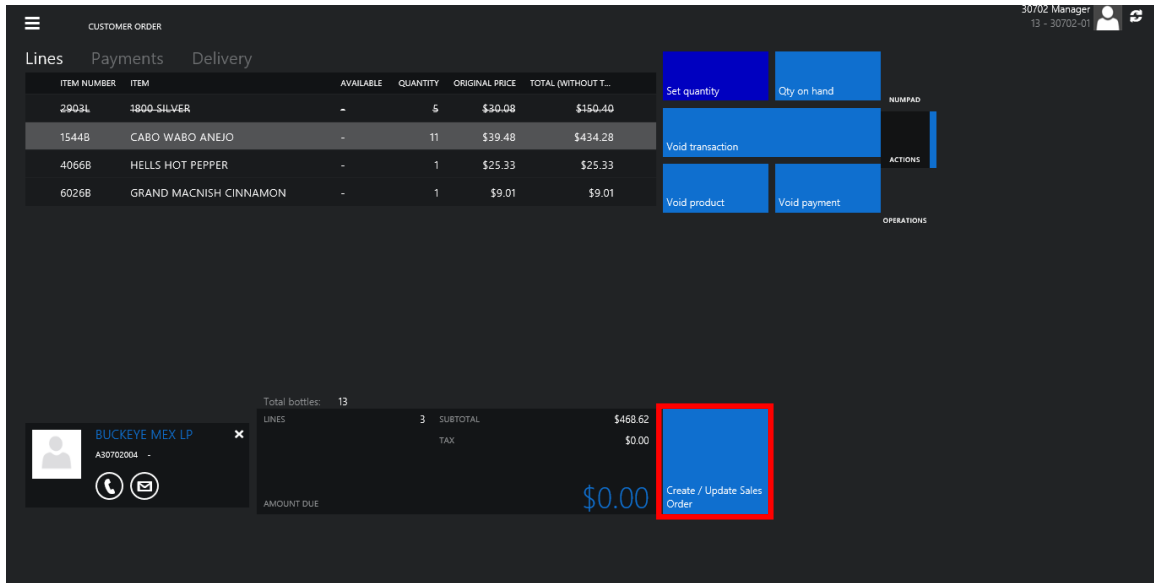
26. Verify quantity, number of bottles, extended price, and sales tax.

This screenshot is identical to the one above, showing the same 'CUSTOMER ORDER' interface. However, a red box highlights the summary section at the bottom, which contains the following information:

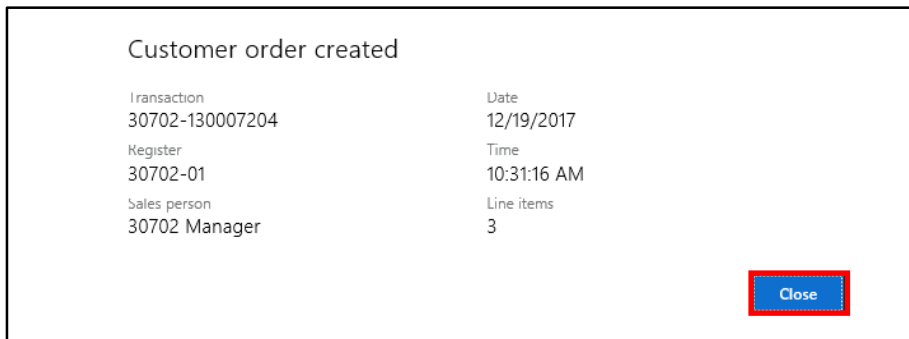
- Total bottles: 13
- 3 LINES
- 3 SUBTOTAL: \$468.62
- TAX: \$0.00
- AMOUNT DUE: \$0.00

The 'Create / Update Sales Order' button is also visible next to the summary information.

27. Press **Create / Update Sales Order** to save any changes made to the order.



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



Results

You have updated a wholesale order.