



Create a Return Wholesale Order

Description

Use this task to create a return a wholesale order in the Wholesale Terminal. The return quantities in this order are entered as negative. In the same return transaction, there must also be sale quantities so that the net order amount is \$0 or above.


Trigger

Perform this task when a customer needs to return a product.

Prerequisites

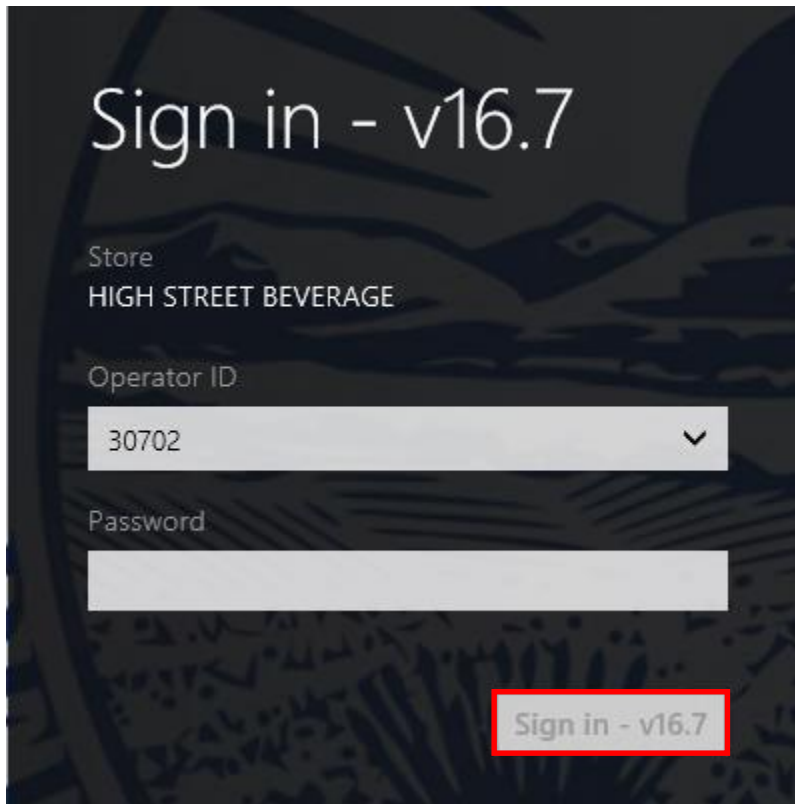
Customer is buying products of equal or greater value.

Helpful Hints

- This procedure is for returned saleable merchandise.
- All actions performed in this job aid can be done using the keyboard and mouse.
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

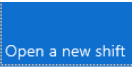
Operator ID

30702

Password

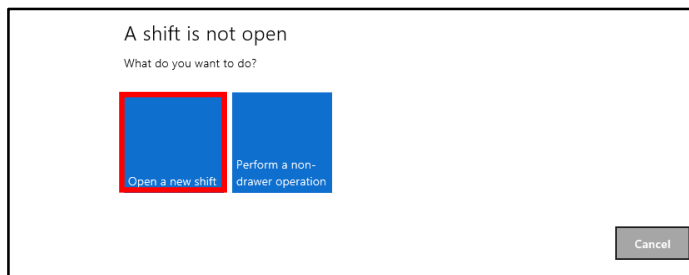
Sign in - v16.7

The image shows a sign-in interface with a dark background. At the top, it says "Sign in - v16.7". Below that, it identifies the store as "HIGH STREET BEVERAGE". There are two input fields: "Operator ID" with the value "30702" and a dropdown arrow, and "Password" which is currently empty. A "Sign in - v16.7" button is located at the bottom right and is highlighted with a red border.

2. Press  to start the shift.



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



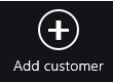
A shift is not open
What do you want to do?

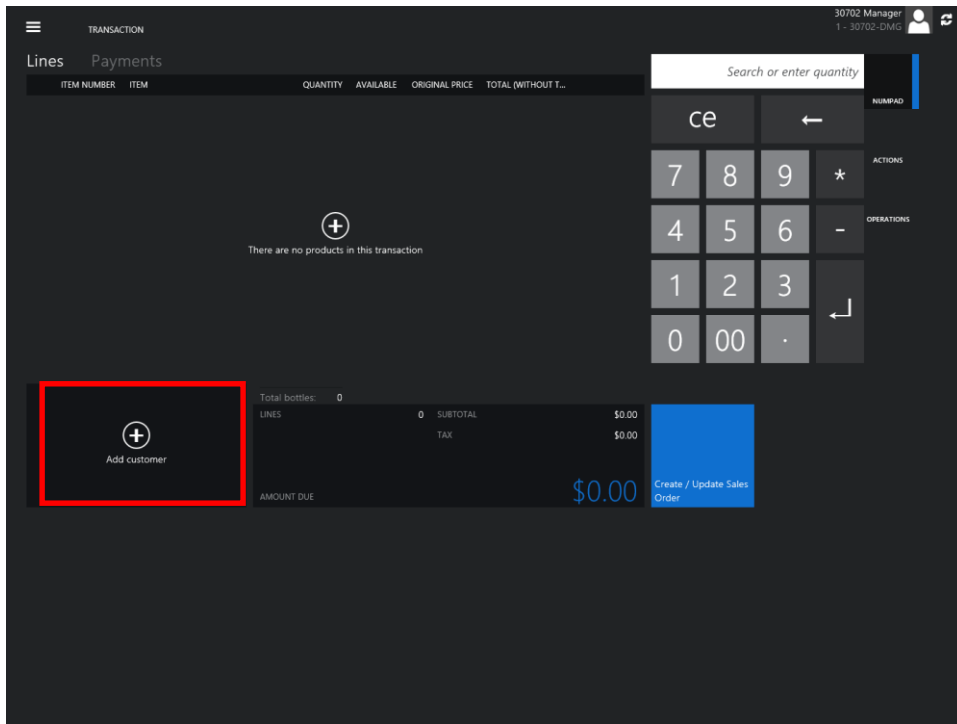
Open a new shift

Perform a non-drawer operation

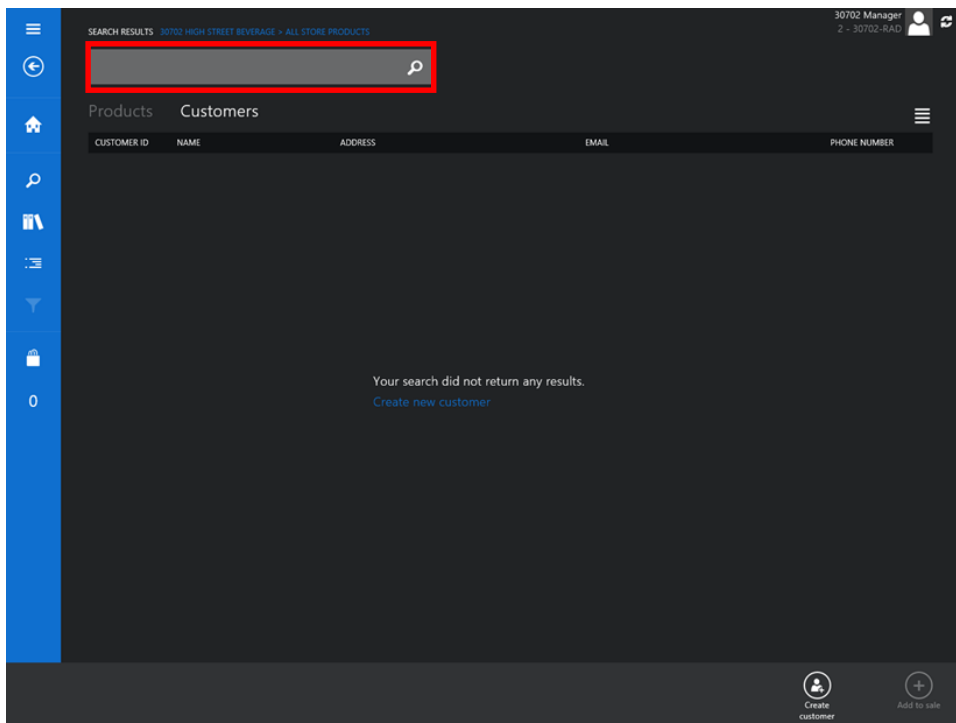
Cancel

The image shows a dialog box with a white background and a black border. At the top, it says "A shift is not open" followed by "What do you want to do?". Below this are 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.

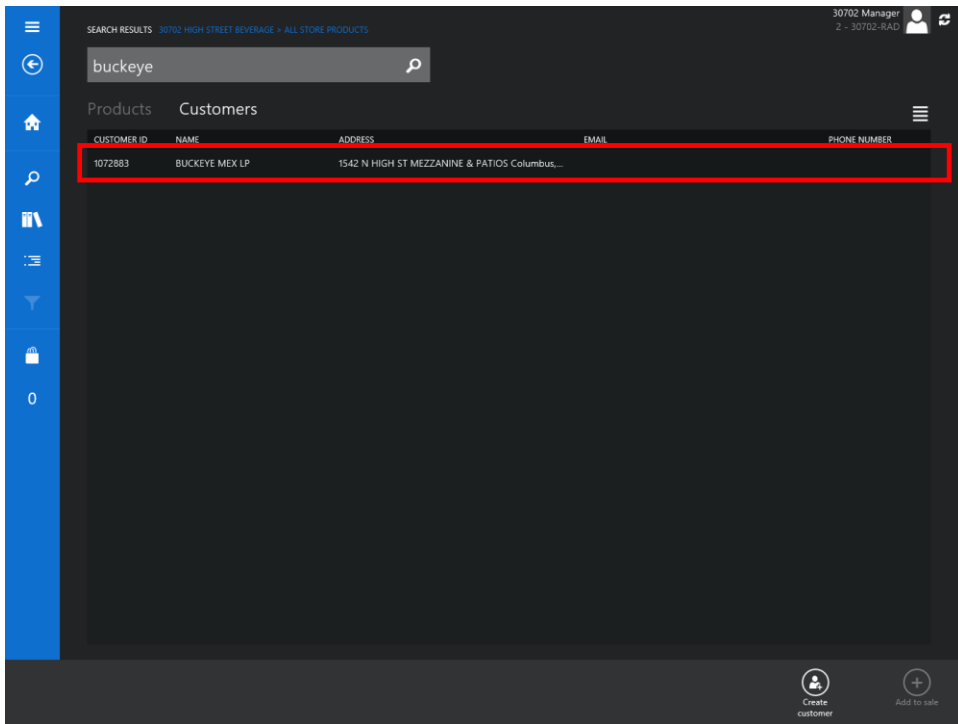
3. Press  to add a customer to the order.




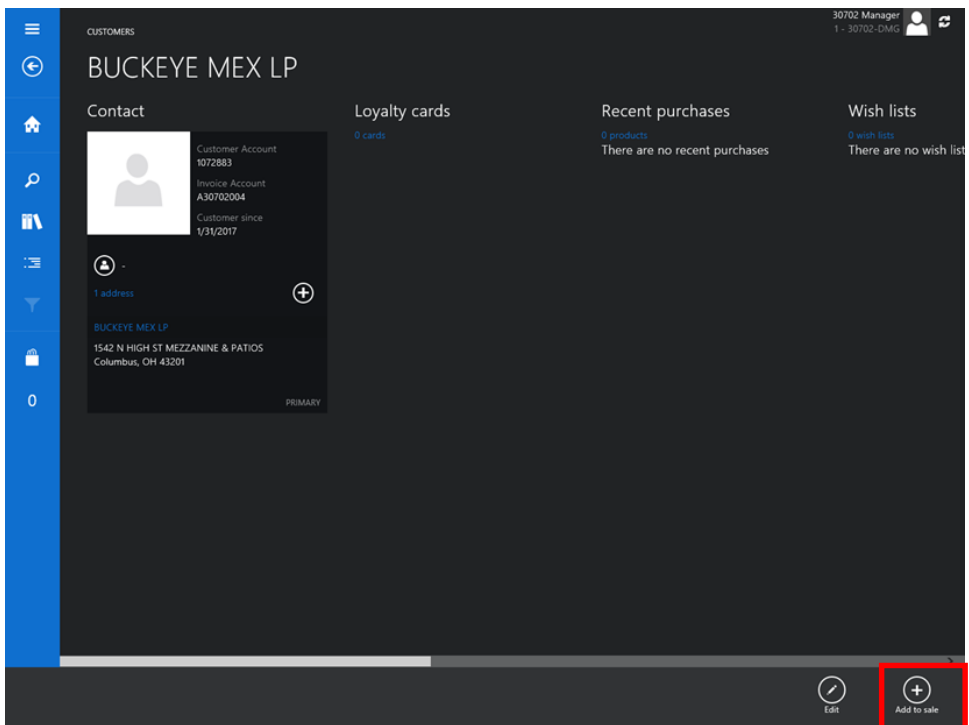
4. Enter the appropriate customer name in the **Search** field. In this example, enter “buckeye.”



5. Select the appropriate customer record from the search results.



6. Press  to add the customer to the sale.



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


Verify Customer Date of Birth

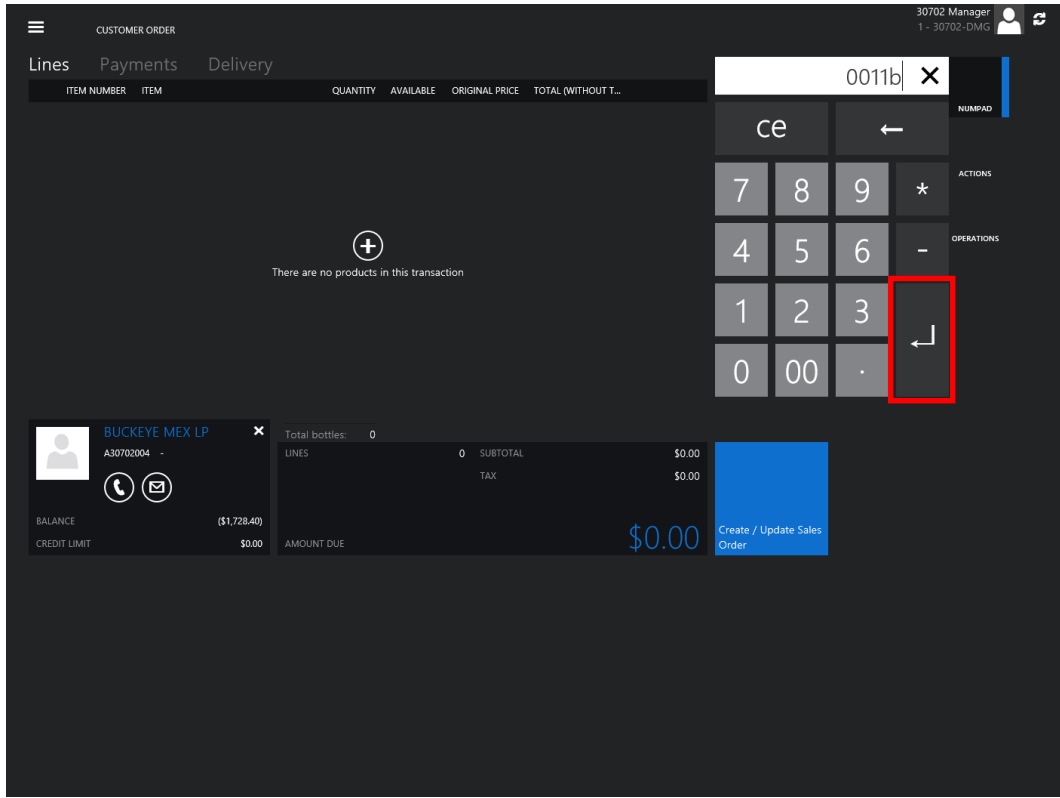
The age limit is 21. Check the customer's ID. The customer must have been born before 3/7/1996.

Yes No

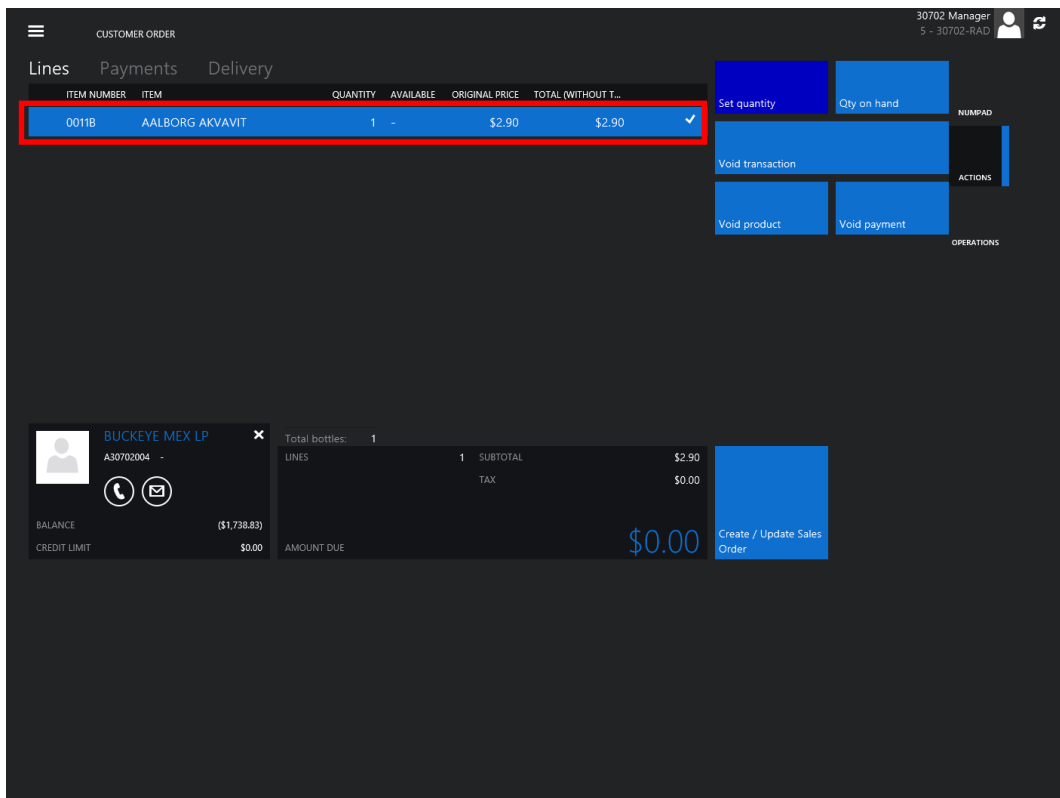
8. Enter the product number in the Numpad. In this example, enter "0011b."

The screenshot shows a mobile application interface for a customer order. The top header is "CUSTOMER ORDER" with tabs for "Lines", "Payments", and "Delivery". Below the tabs is a table with columns: "ITEM NUMBER", "ITEM", "QUANTITY", "AVAILABLE", "ORIGINAL PRICE", and "TOTAL (WITHOUT T...". A message in the center says "There are no products in this transaction". On the right side, a numpad is open, and the text "ce" is entered in the input field. The bottom of the screen displays customer information for "BUCKEYE MEX LP" and a summary table with columns "LINES", "SUBTOTAL", and "TAX". The "AMOUNT DUE" is shown as "\$0.00". A blue button labeled "Create / Update Sales Order" is at the bottom right.

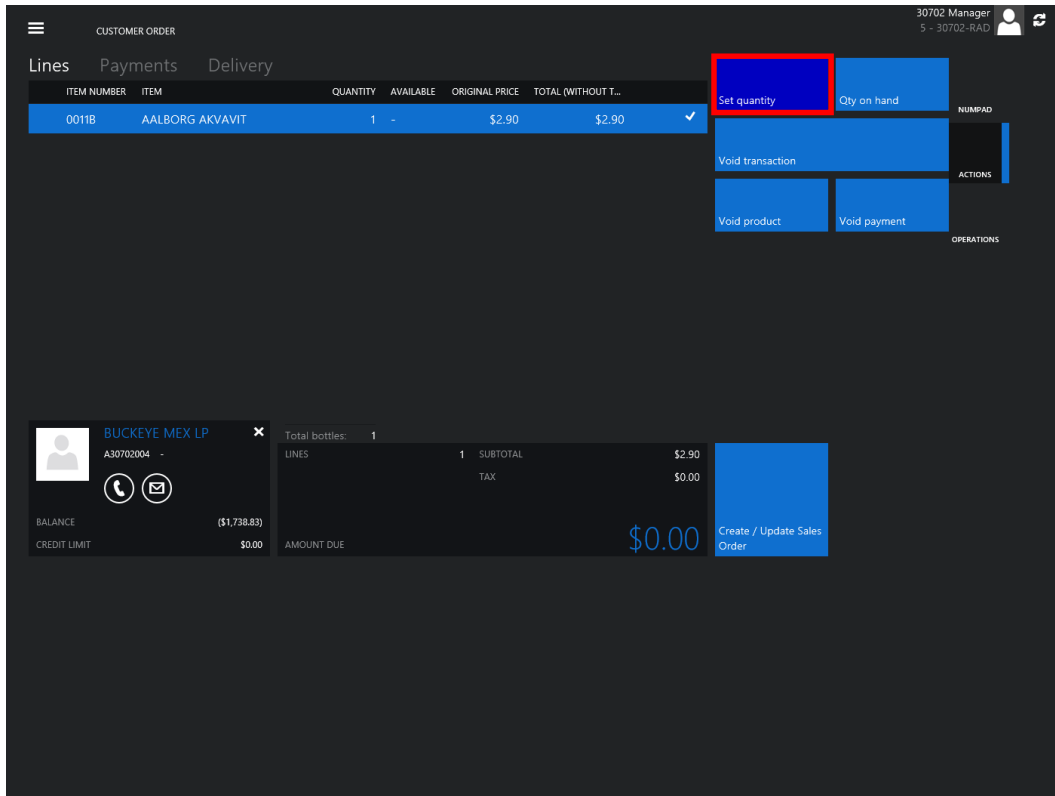
9. Press  to add the product to the order.



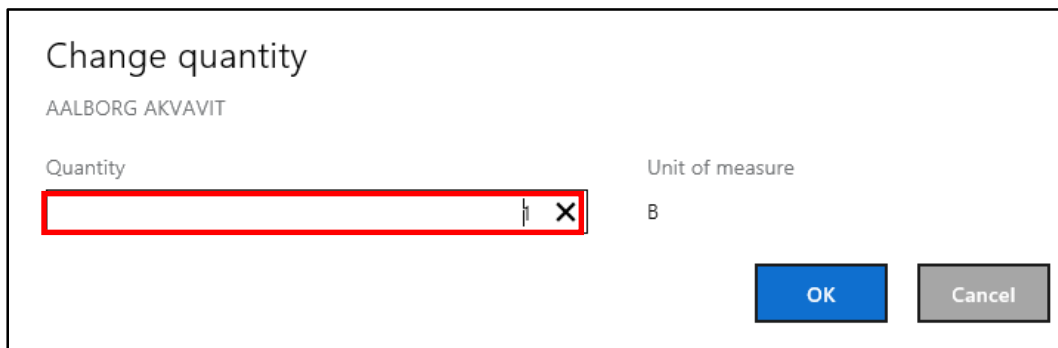
10. Select the product.



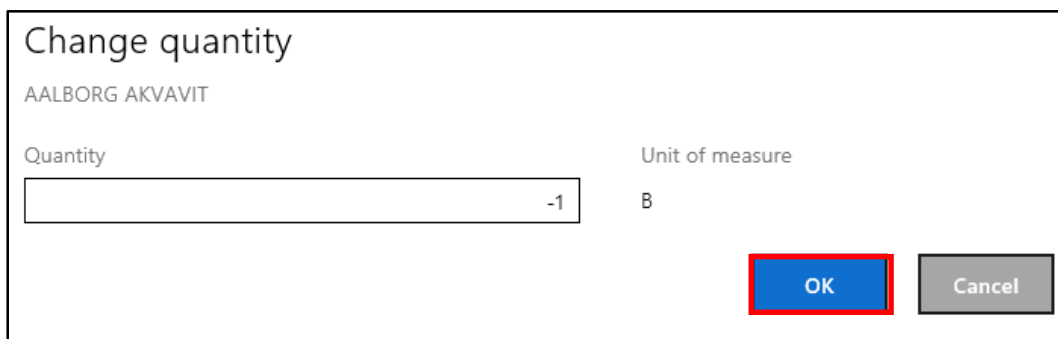
11. Press **Set quantity** to display the *Change quantity* screen.



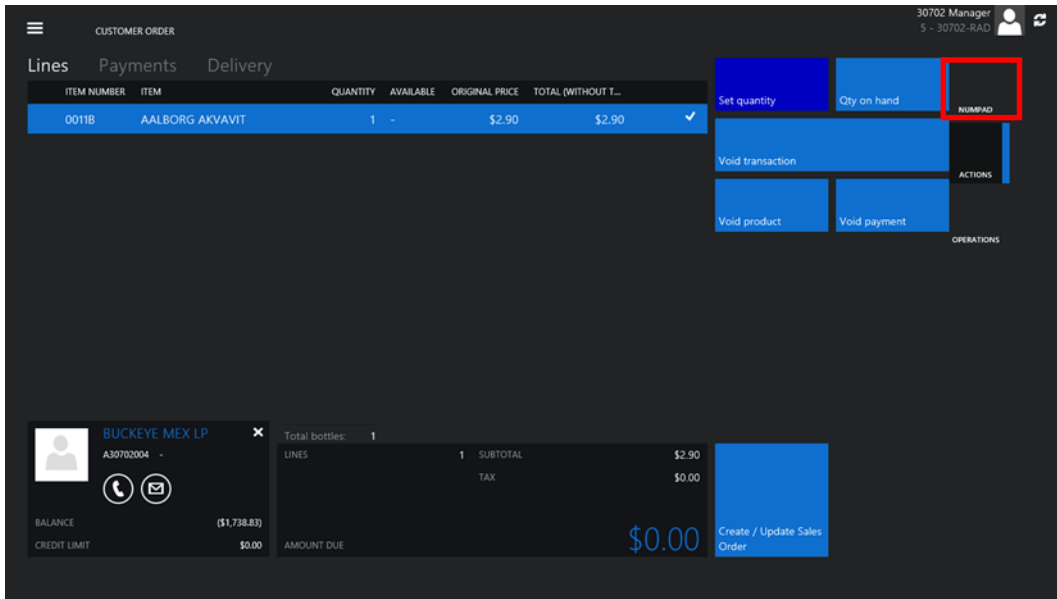
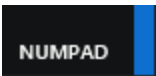
12. Enter a “minus sign” and the quantity in the **Quantity** field. In this example, enter “-1.”



13. Press **OK** to add the quantity to the item.



14. Press

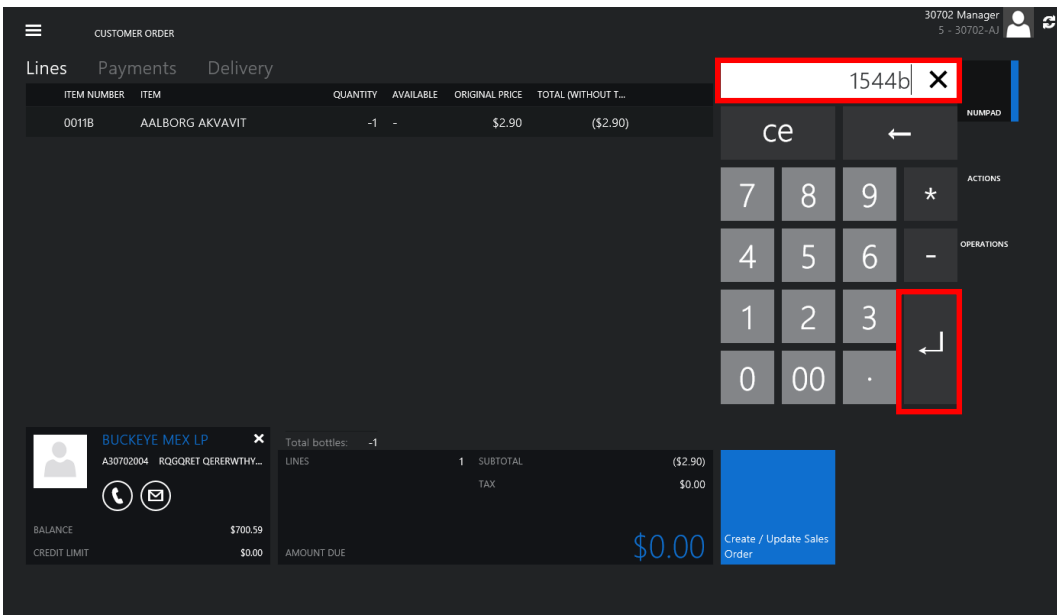


15. Enter the item number the wholesale customer wants to buy in the same transaction. In this example, enter "1544b."

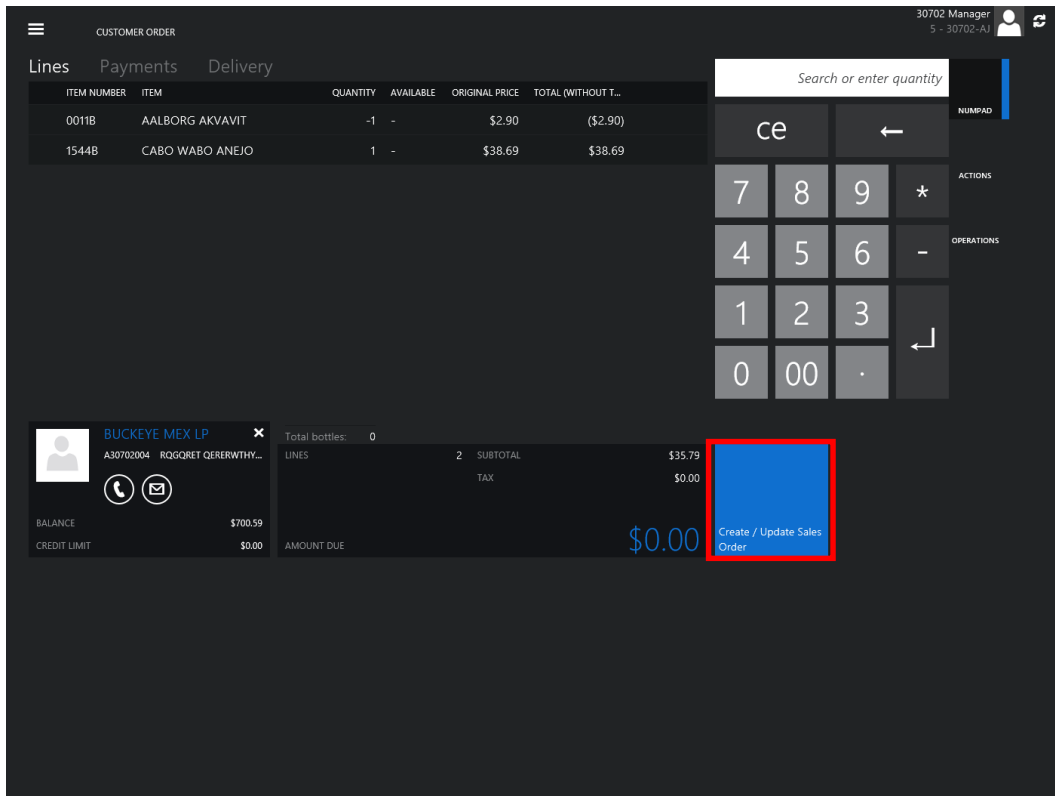
16. Press



to add the item to the order.



17. Press  to create the order.



ITEM NUMBER	ITEM	QUANTITY	AVAILABLE	ORIGINAL PRICE	TOTAL (WITHOUT T...
0011B	AALBORG AKVAVIT	-1	-	\$2.90	(\$2.90)
1544B	CABO WABO ANEJO	1	-	\$38.69	\$38.69

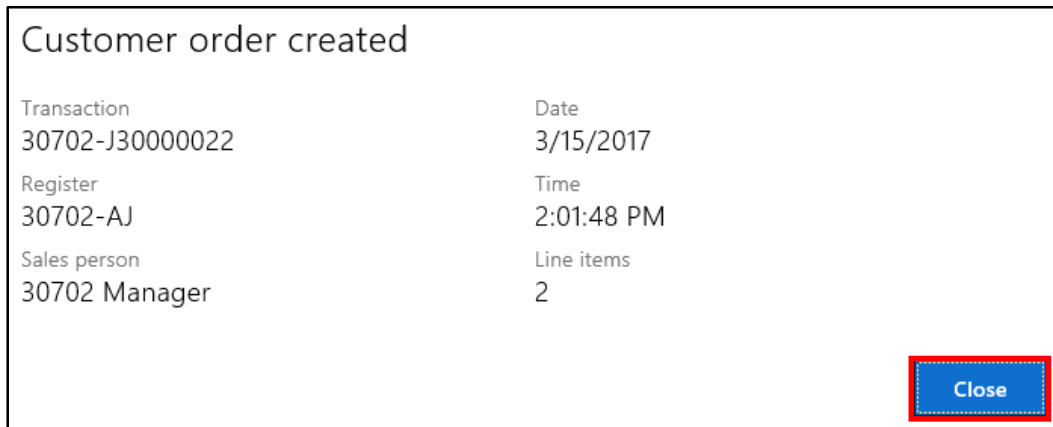
BUCKEYE MEX LP
A30702004 RQGQRET QERERWHY...

Total bottles: 0

LINES	2	SUBTOTAL	\$35.79
		TAX	\$0.00
BALANCE			\$700.59
CREDIT LIMIT			\$0.00
AMOUNT DUE			\$0.00

Create / Update Sales Order

18. Press  to complete this task.



Customer order created

Transaction	Date
30702-J30000022	3/15/2017
Register	Time
30702-AJ	2:01:48 PM
Sales person	Line items
30702 Manager	2

Close

Results

You have returned a wholesale order.