



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

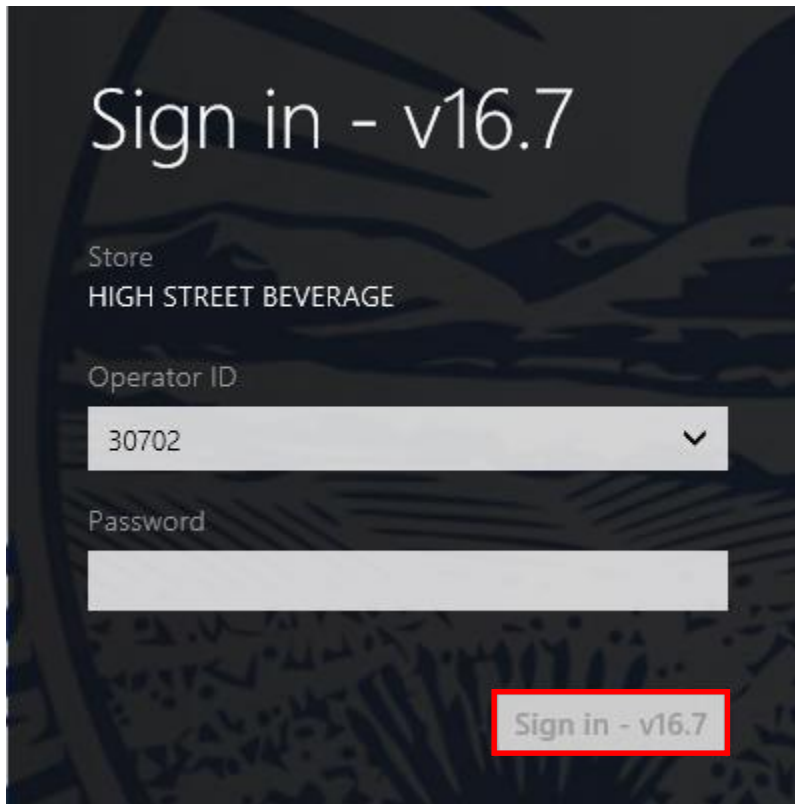
All actions performed in this job aid can be done using the keyboard and mouse.

Examples:

- Press  on Numpad or
- Press the **Enter** key on the keyboard

Procedure

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



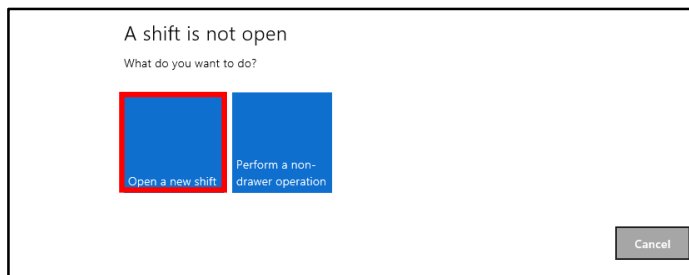
The screenshot shows a login interface with the following elements:

- Title: Sign in - v16.7
- Store: HIGH STREET BEVERAGE
- Operator ID: 30702 (with a dropdown arrow)
- Password: (empty text field)
- Sign in button: A button labeled "Sign in - v16.7" is highlighted with a red rectangular border.

2. Press  to start the shift.

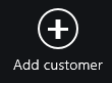


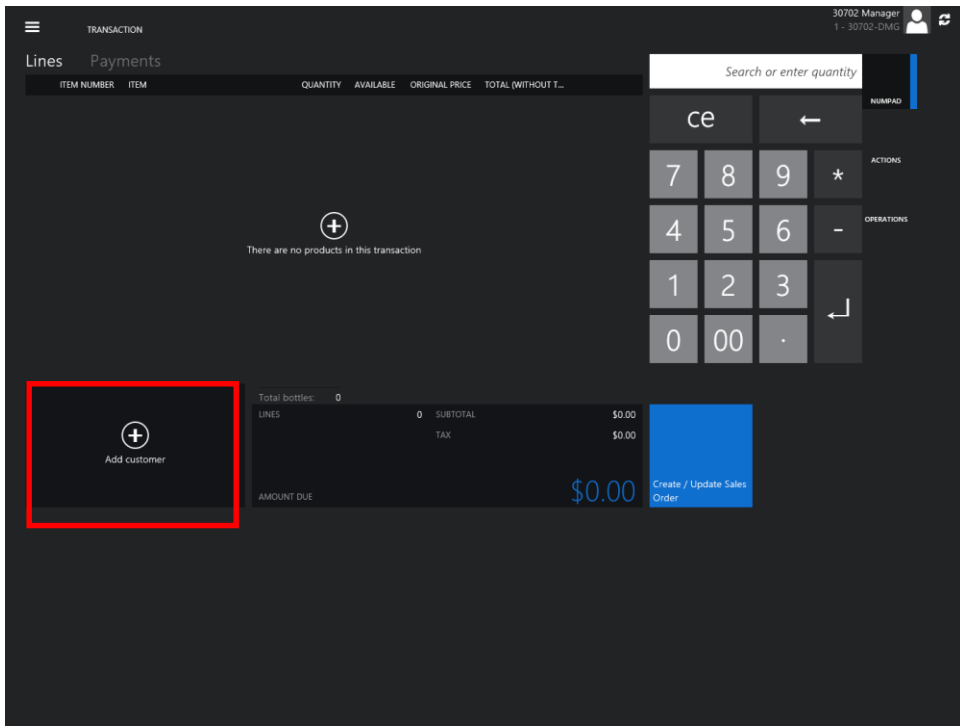
The *Open shift* window will only display if the shift is not already opened.



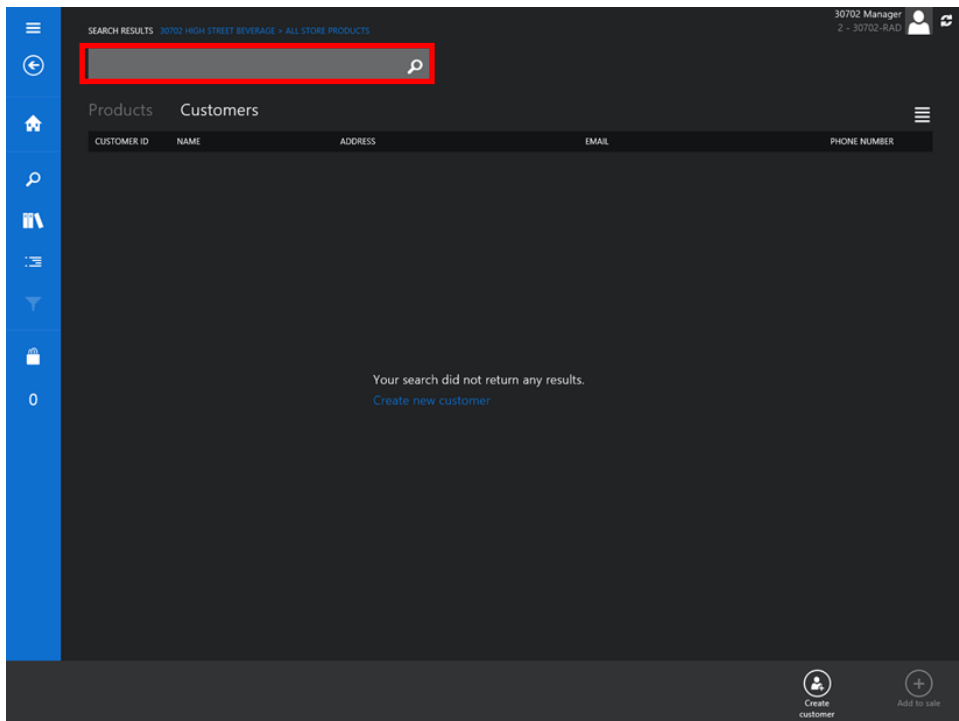
The dialog box contains the following text and options:

- Header: A shift is not open
- Question: What do you want to do?
- Options: Two blue buttons are shown side-by-side. The left button is labeled "Open a new shift" and is highlighted with a red border. The right button is labeled "Perform a non-drawer operation".
- Cancel: A grey "Cancel" button is located in the bottom right corner.

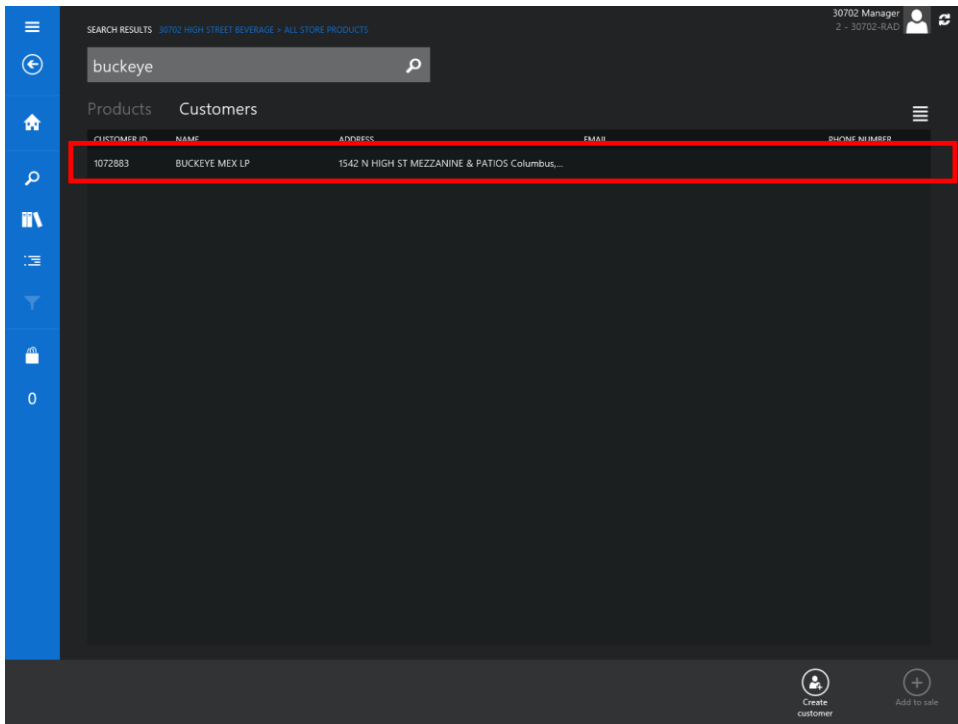
3. Press  to add a customer to the order.




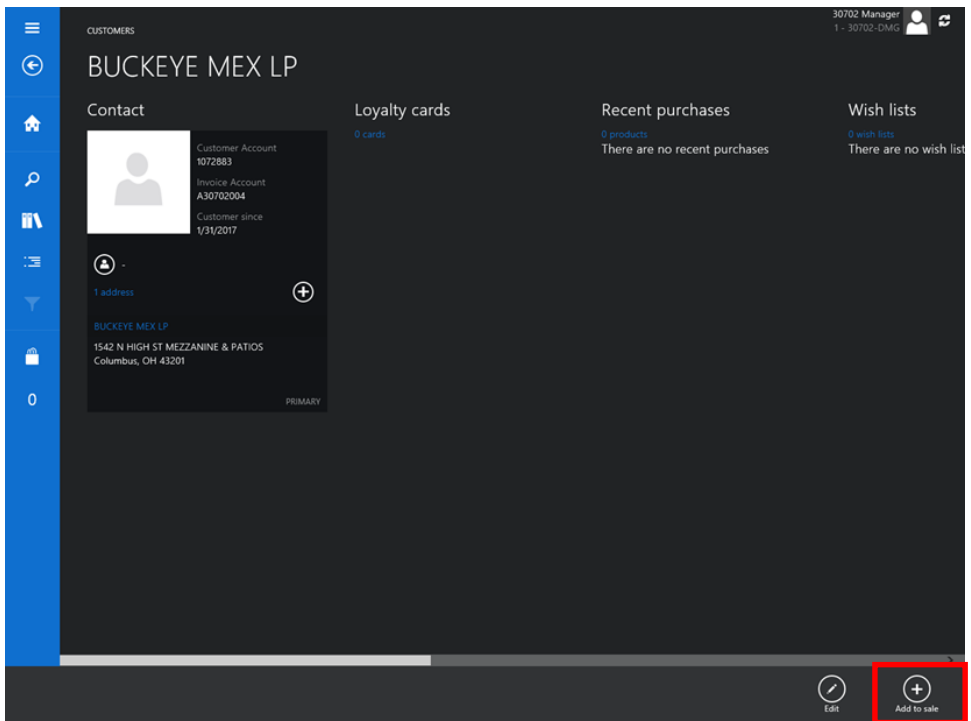
4. Enter the appropriate customer name in the **Search** field. In this example, enter “buckeye.”



5. Select the appropriate customer record.



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."

CUSTOMER ORDER

30702 Manager
1 - 30702-DMG

Lines Payments Delivery

ITEM NUMBER	ITEM	QUANTITY	AVAILABLE	ORIGINAL PRICE	TOTAL (WITHOUT T...
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There are no products in this transaction

NUMPAD

ce

7 8 9 *
4 5 6 -
1 2 3 ↵
0 00 . ↵

BUCKEYE MEX LP
A30702004 -


Total bottles: 0

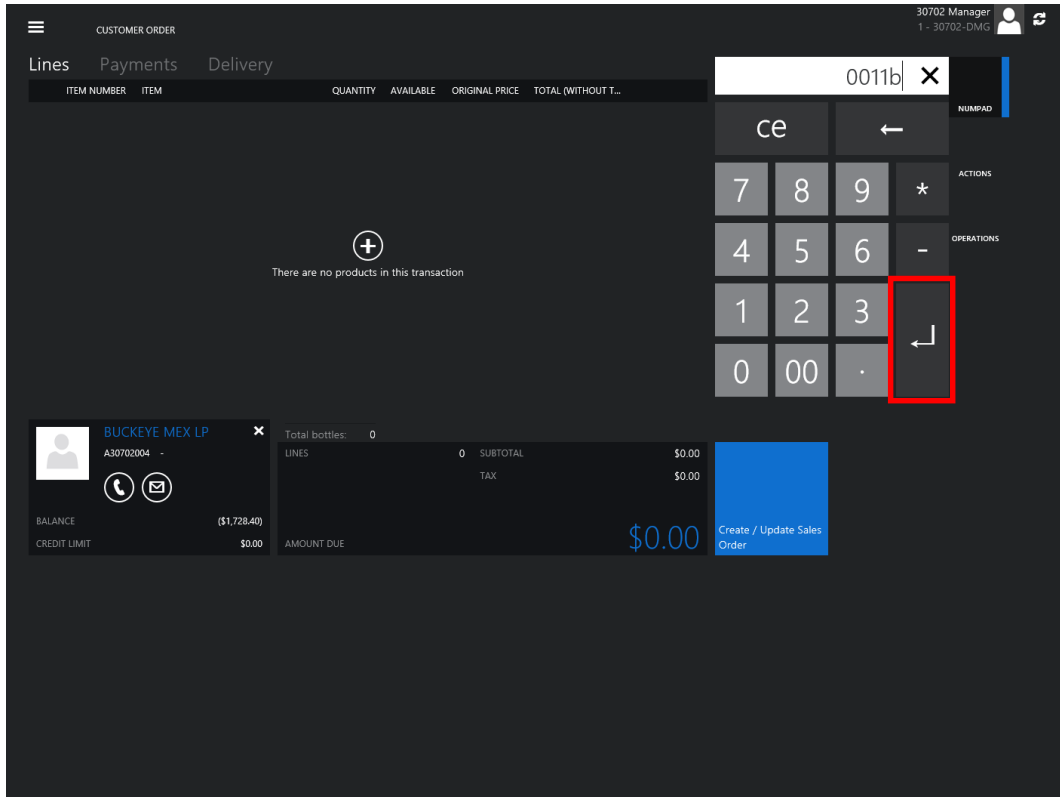
LINES	0	SUBTOTAL	\$0.00
		TAX	\$0.00

BALANCE (\$1,728.40)
CREDIT LIMIT \$0.00

AMOUNT DUE \$0.00

Create / Update Sales Order

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. To the right of the table is a numeric keypad with buttons for digits 0-9, a decimal point, and a left arrow. Below the table, there 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 **ACTIONS** to update the quantities.

This screenshot is identical to the previous one, but the 'ACTIONS' button on the right side of the numeric keypad is highlighted with a red box. The 'ACTIONS' label is positioned to the right of the keypad.

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

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

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

Change quantity

ANCHO REYES

Quantity:

Unit of measure: B

OK Cancel

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

Change quantity

ANCHO REYES

Quantity:

Unit of measure: B

OK Cancel

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.

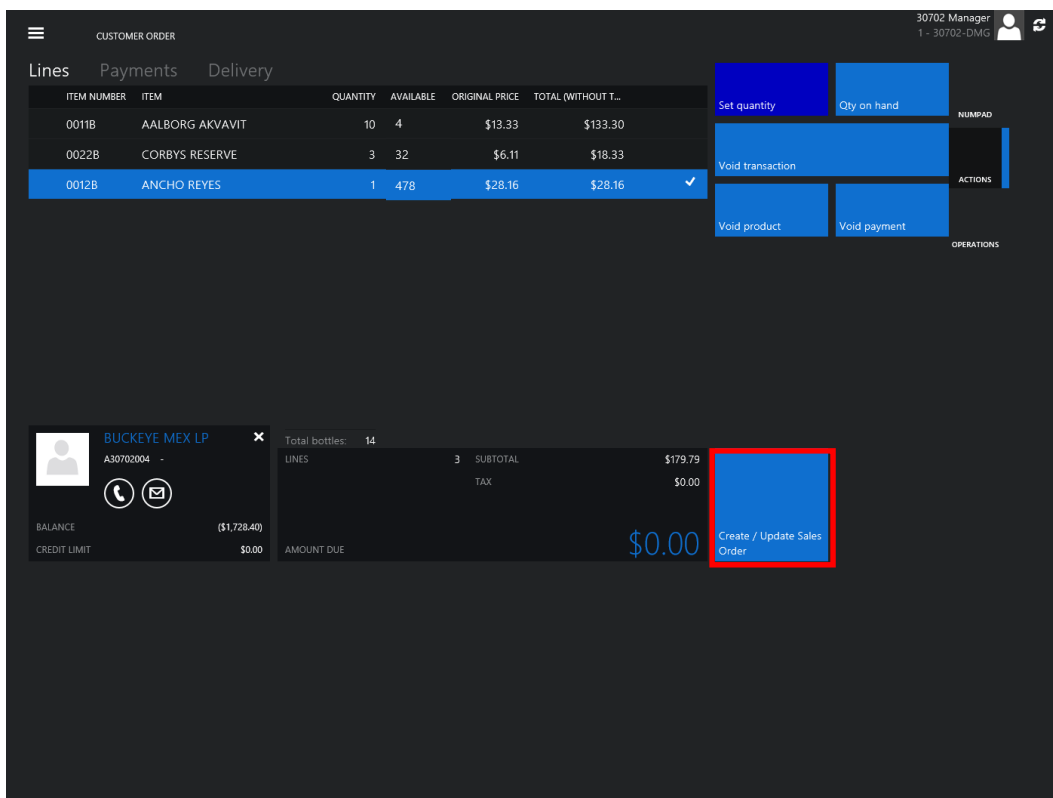
The screenshot displays a mobile application interface for a customer order. At the top, it shows 'CUSTOMER ORDER' and user information '30702 Manager' and '1 - 30702-DMG'. Below this, there are tabs for 'Lines', 'Payments', and 'Delivery'. A table lists order lines with columns for 'ITEM NUMBER', 'ITEM', 'QUANTITY', 'AVAILABLE', 'ORIGINAL PRICE', and 'TOTAL (WITHOUT T...'. The third line, '0012B ANCHO REYES', is selected. To the right of the table, there are buttons for 'Set quantity', 'Qty on hand' (highlighted with a red box), 'Void transaction', 'Void product', and 'Void payment'. Below the table, there is a summary section for 'BUCKEYE MEX LP' showing 'Total bottles: 14', 'LINES: 3', 'SUBTOTAL: \$179.79', 'TAX: \$0.00', and 'AMOUNT DUE: \$0.00'. A 'Create / Update Sales Order' button is also visible.

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

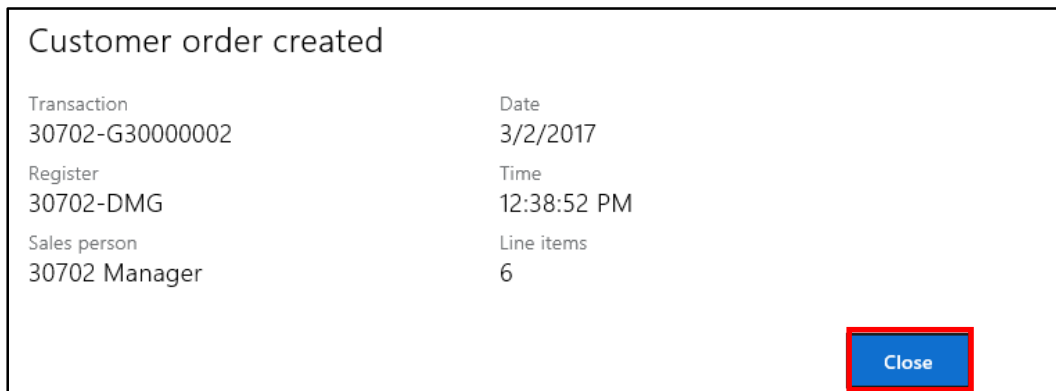
Summary:

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

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.