



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

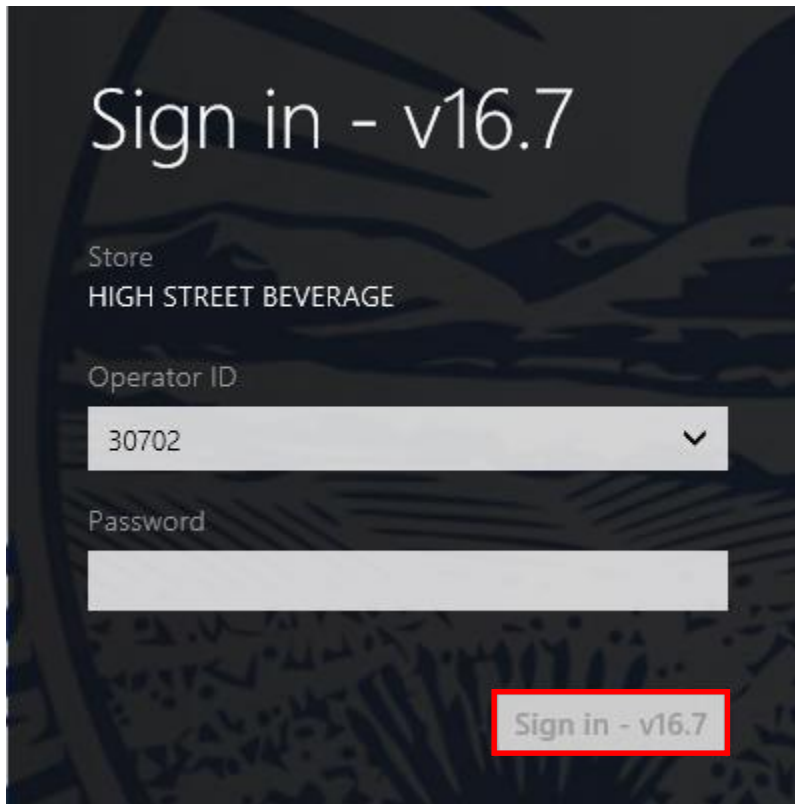
Transient customer exists in the system.

Helpful Hints

- This procedure is similar to entering an order for an assigned customer except that **Permit Number** and **Permit Expiration Date** are two 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** key 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

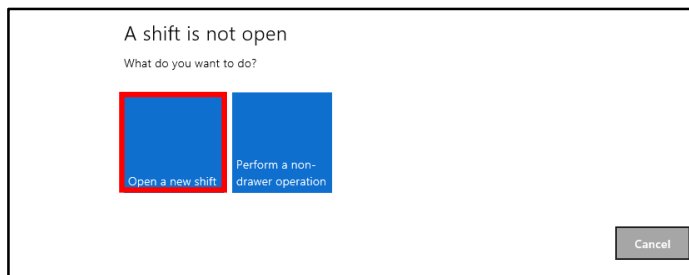
Sign in - v16.7

The image shows a sign-in screen for version v16.7. The background is dark with a faint pattern. The text 'Sign in - v16.7' 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'. A 'Sign in - v16.7' 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.



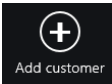
A shift is not open
What do you want to do?

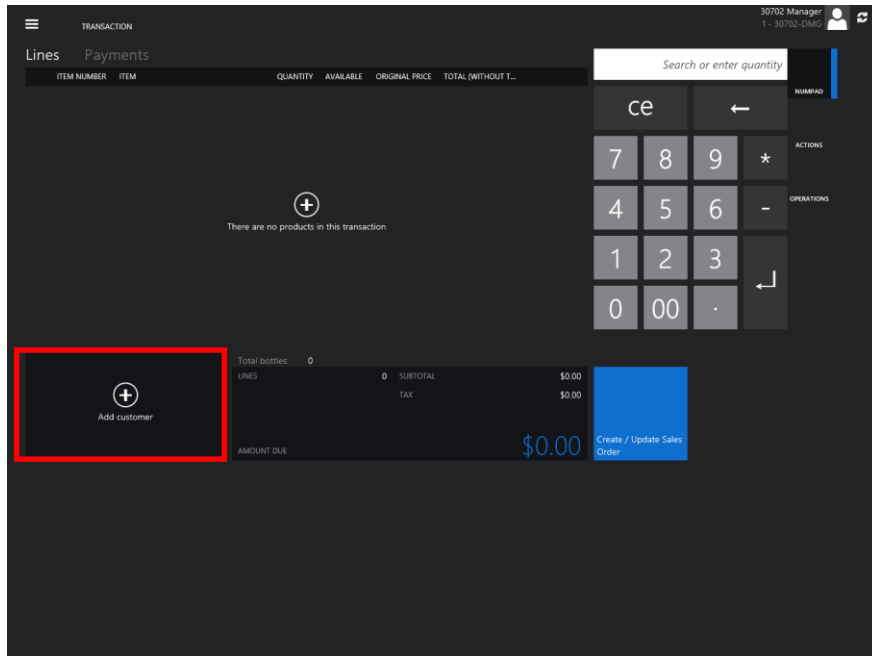
Open a new shift

Perform a non-drawer operation

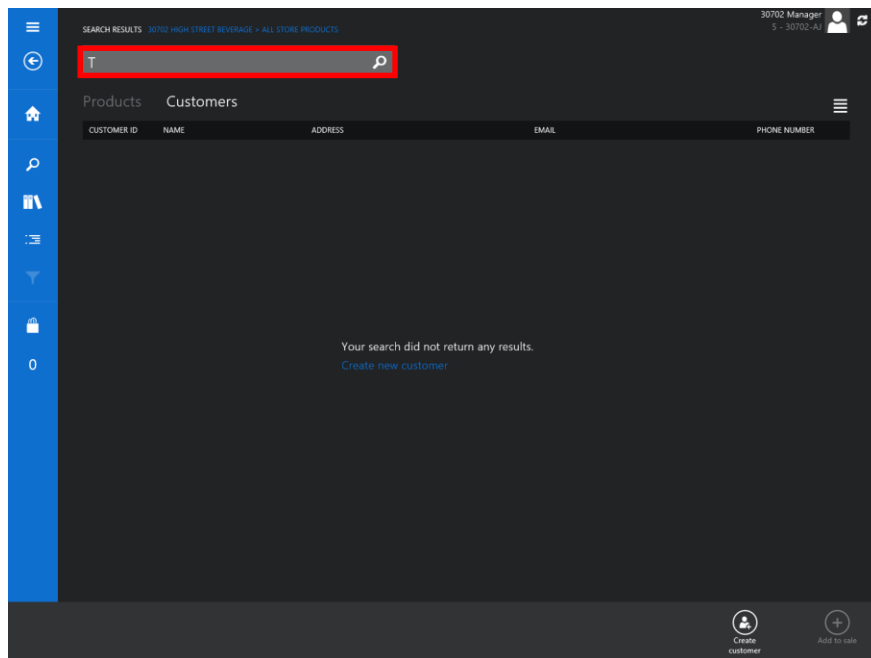
Cancel

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?'. There are two blue buttons: 'Open a new shift' (highlighted with a red box) and 'Perform a non-drawer operation'. A 'Cancel' button is at the bottom right.

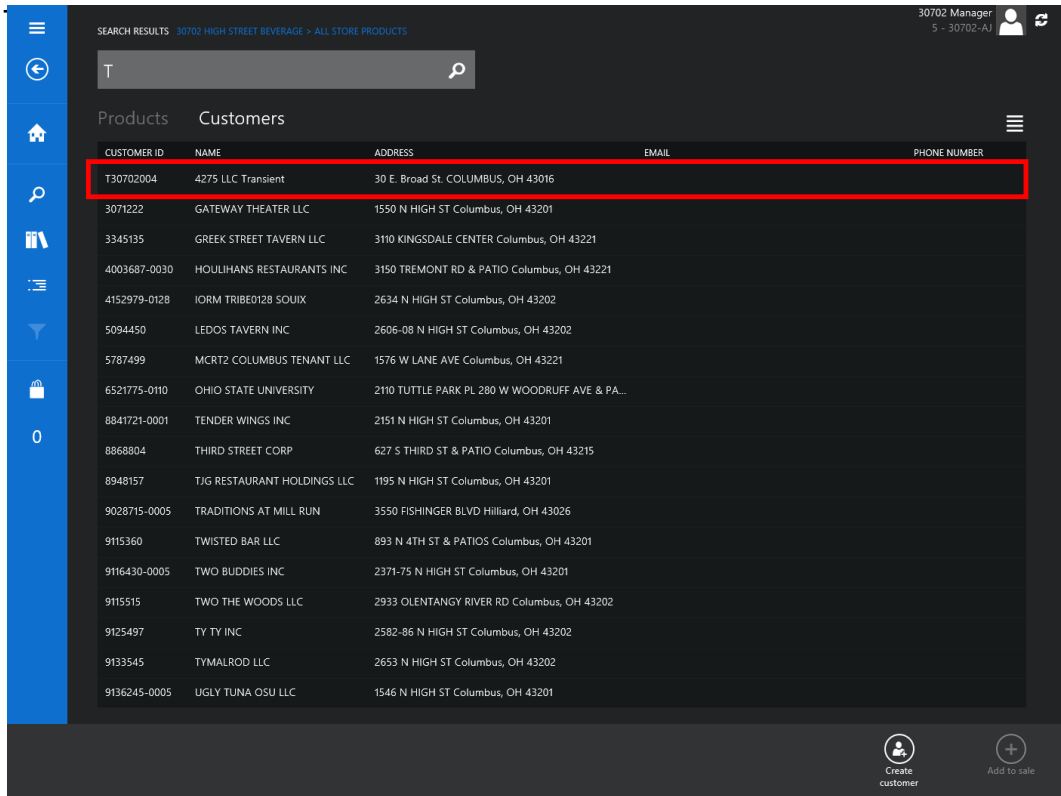
3. Click  to add the customer to order.




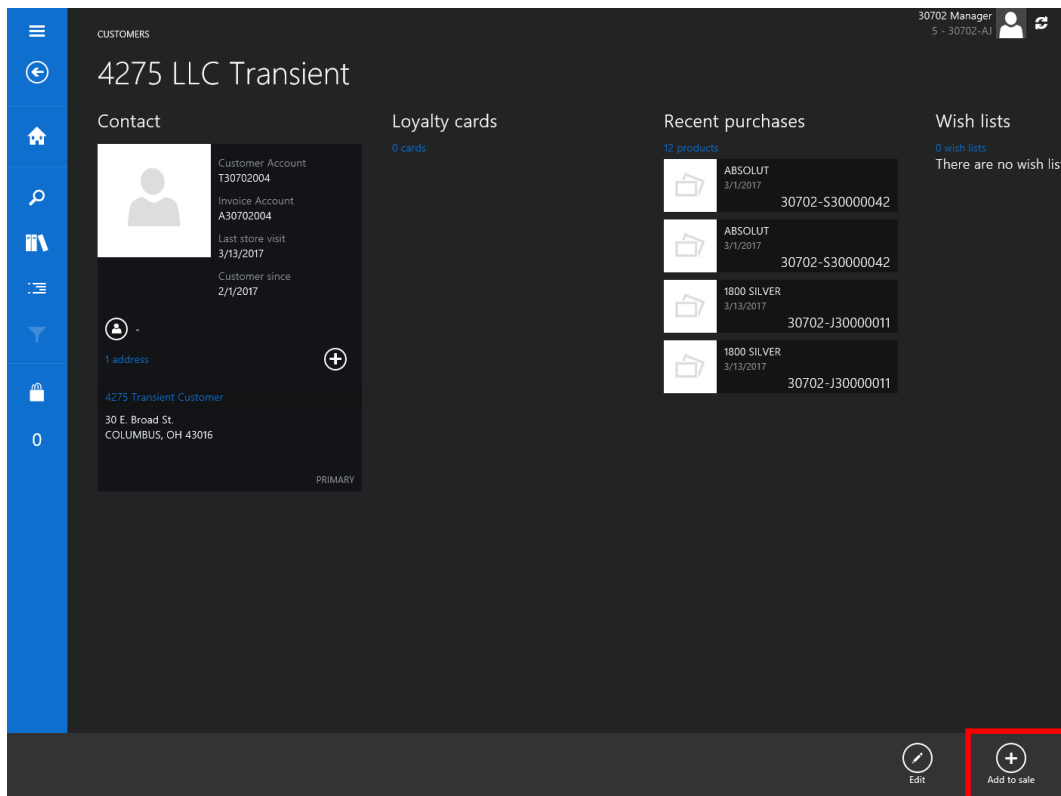
4. Search for the transient customer in the **Search** field. In this example, enter “T.”



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





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

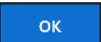


7. Press  after verifying the age of the customer.



Verify Customer Date of Birth

The age limit is 21. Check the customer's ID. The customer must have been born before 3/2/1996.

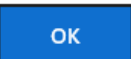
8. Enter the permit number in the **Enter Permit Number** field. In this example, enter "1234567890123" and press .

Enter Permit Number

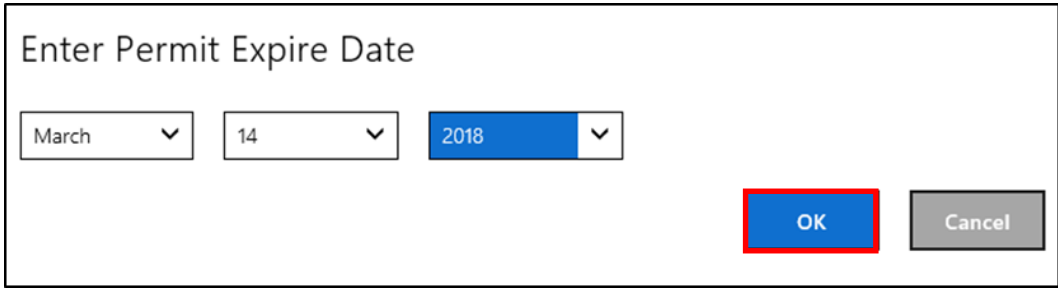
 

9. Enter the month, date, and year. In this example enter "March 14, 2018."

Enter Permit Expire Date

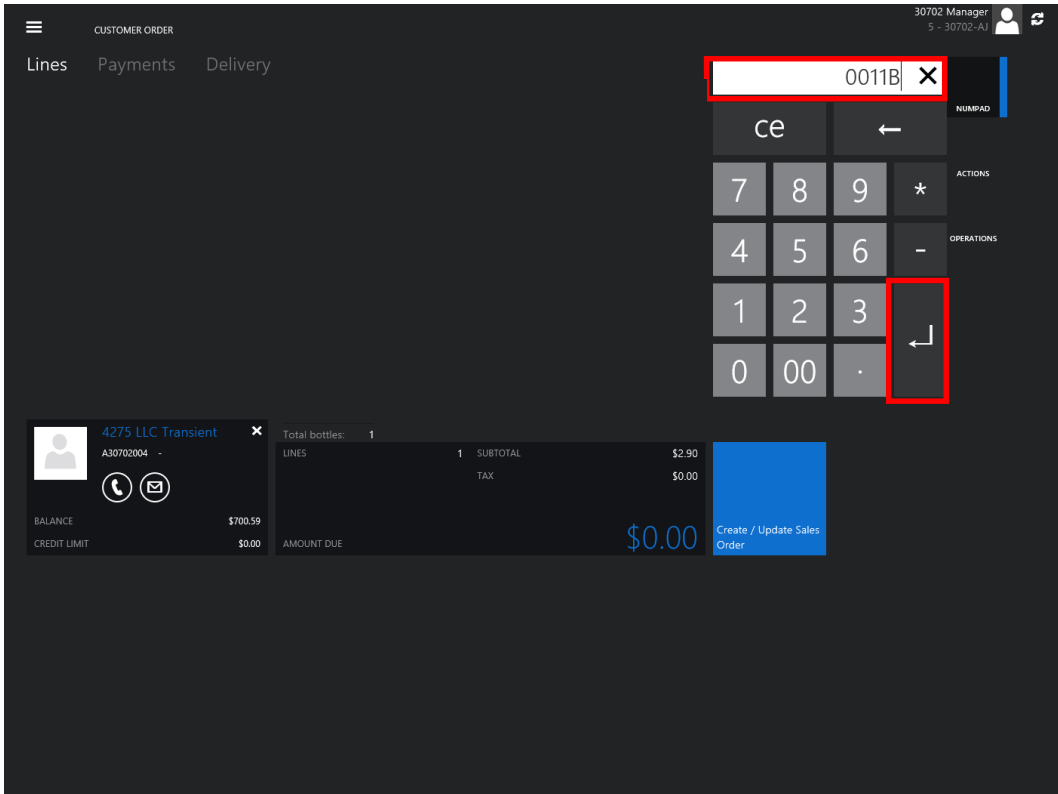
10. Press  .



The screenshot shows a dialog box titled "Enter Permit Expire Date". It contains three dropdown menus for date selection: "March", "14", and "2018". The "2018" dropdown is highlighted in blue. At the bottom right, there are two buttons: "OK" (highlighted with a red border) and "Cancel".

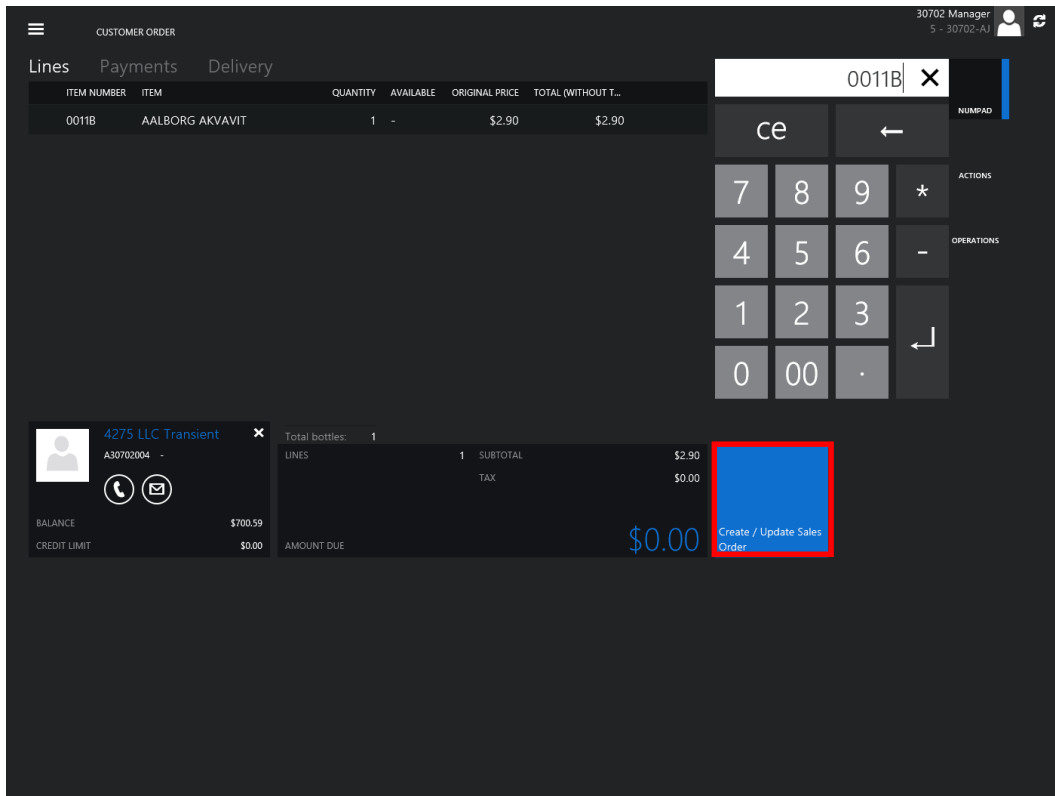
11. Enter the product number or name in the **Numpad** field. In this example, enter "0011B."

12. Press  .

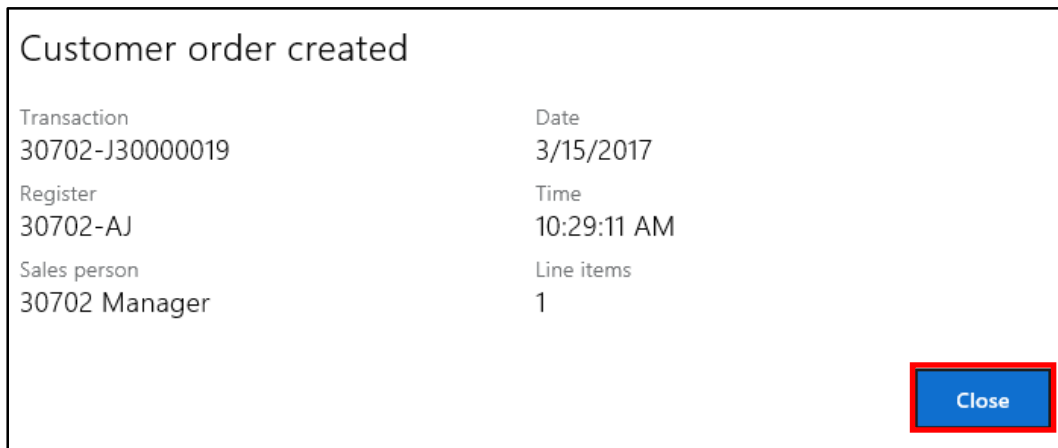


The screenshot shows the application interface. At the top, it says "CUSTOMER ORDER" and "30702 Manager". Below that, there are tabs for "Lines", "Payments", and "Delivery". A search bar contains "0011B" and is highlighted with a red border. Below the search bar is a numpad with buttons for numbers 0-9, a decimal point, and a back arrow. The numpad is also highlighted with a red border. At the bottom, there is a summary section for "4275 LLC Transient" with a balance of \$700.59 and a credit limit of \$0.00. The amount due is \$0.00. A blue button labeled "Create / Update Sales Order" is visible.

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



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



Results

You have entered a wholesale order for a transient customer.