



# 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

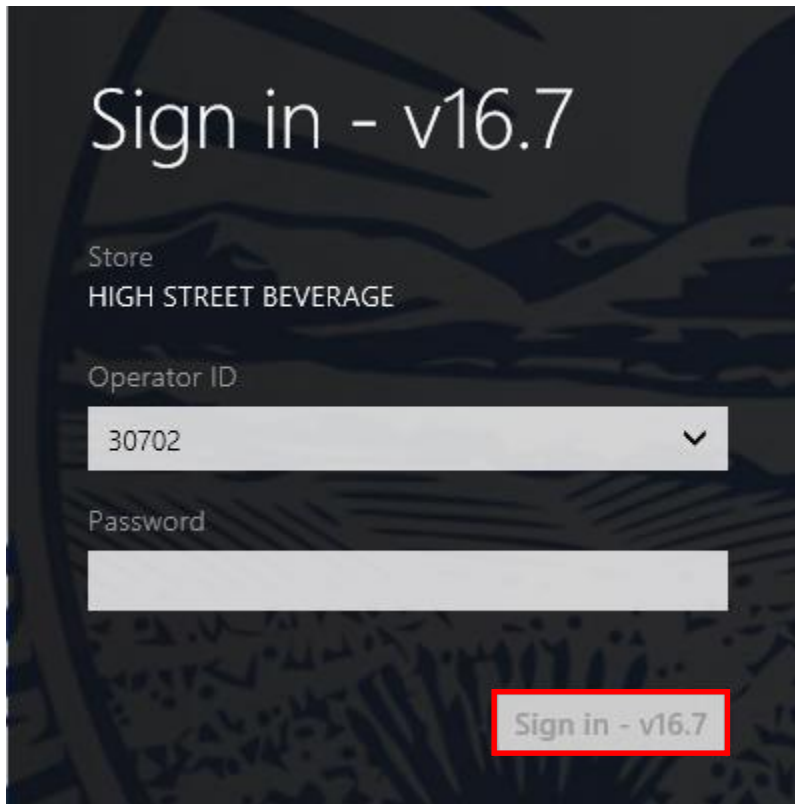
There are created wholesale orders in the system that have not been invoiced.

## Helpful Hints

- This job aid shows how to update a wholesale order. There are several methods to update an order, by:
  - 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 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

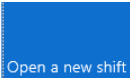
Operator ID

30702

Password

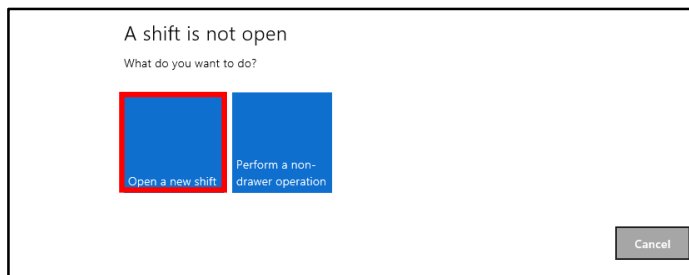
Sign in - v16.7

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?

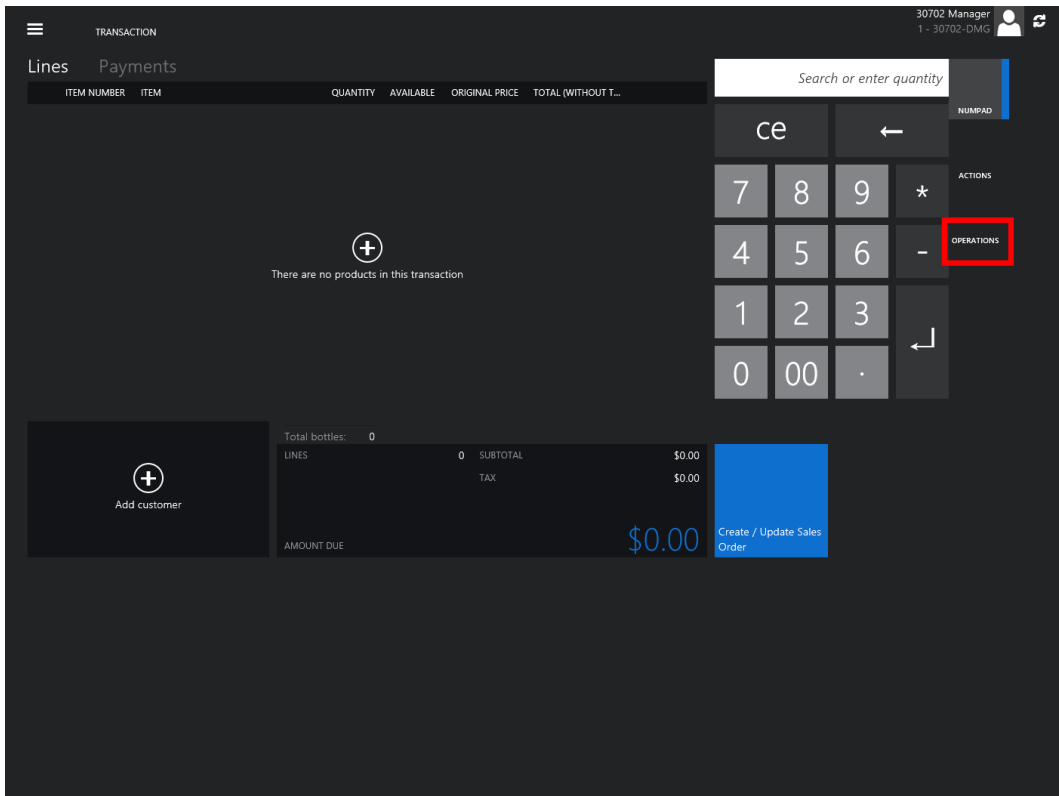
Open a new shift

Perform a non-drawer operation

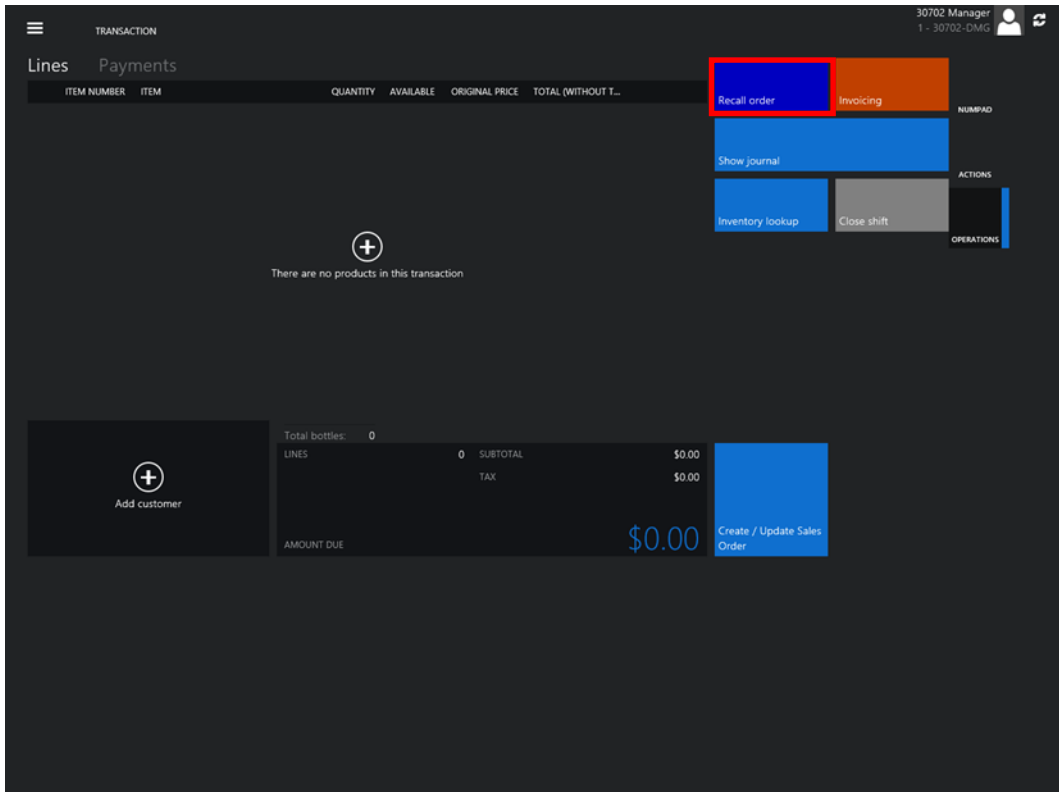
Cancel

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?'. 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.

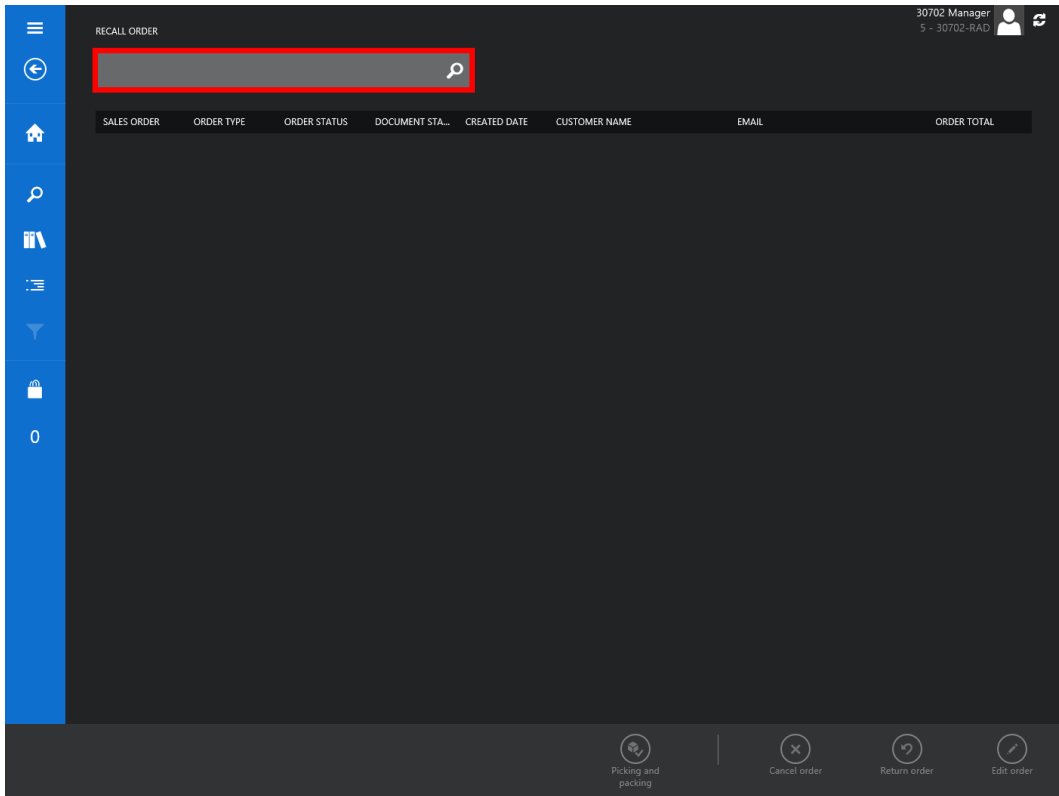
3. Press **OPERATIONS** to display the operations options.



4. Press **Recall order**.



5. Enter the name of customer in the search field. In this example, enter “buck.”



6. Select the appropriate order to be updated. In this example, select "DSO000000181."

RECALL ORDER

30702 Manager  
5 - 30702-AJ

buck

SALES ORDER	ORDER TYPE	ORDER STATUS	DOCUMENT STA...	CREATED DATE	CUSTOMER NAME	EMAIL	ORDER TOTAL
DSO000000181	Customer Ord...	Created	Created	3/14/2017	BUCKEYE MEX LP		\$421.63 ✓
DSO000000178	Customer Ord...	Invoiced	Invoiced	3/13/2017	BUCKEYE MEX LP		\$30.16
DSO000000177	Customer Ord...	Invoiced	Invoiced	3/13/2017	BUCKEYE MEX LP		\$269.71
DSO000000174	Customer Ord...	Canceled	Created	3/13/2017	BUCKEYE MEX LP		\$0.00
DSO000000173	Customer Ord...	Invoiced	Invoiced	3/10/2017	BUCKEYE MEX LP		\$2.90
DSO000000172	Customer Ord...	Invoiced	Invoiced	3/10/2017	BUCKEYE MEX LP		(\$2.90)
DSO000000170	Customer Ord...	Invoiced	Invoiced	3/9/2017	BUCKEYE MEX LP		\$2.90
DSO000000167	Customer Ord...	Canceled	Created	3/9/2017	BUCKEYE MEX LP		\$0.00
DSO000000166	Customer Ord...	Invoiced	Invoiced	3/7/2017	BUCKEYE MEX LP		(\$13.33)
DSO000000158	Customer Ord...	Canceled	Created	3/2/2017	BUCKEYE MEX LP		\$0.00
DSO000000157	Customer Ord...	Canceled	Created	3/2/2017	BUCKEYE MEX LP		\$0.00

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

7. Press  to edit the order.

RECALL ORDER

30702 Manager  
5 - 30702-AJ

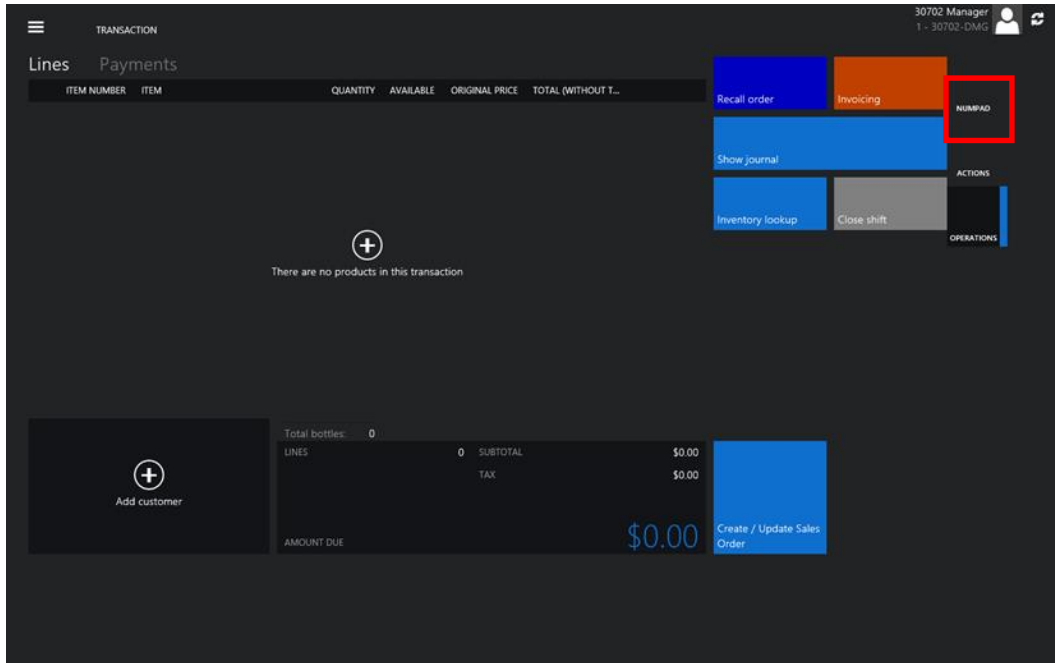
buck

SALES ORDER	ORDER TYPE	ORDER STATUS	DOCUMENT STA...	CREATED DATE	CUSTOMER NAME	EMAIL	ORDER TOTAL
DSO000000181	Customer Ord...	Created	Created	3/14/2017	BUCKEYE MEX LP		\$421.63 ✓
DSO000000178	Customer Ord...	Invoiced	Invoiced	3/13/2017	BUCKEYE MEX LP		\$30.16
DSO000000177	Customer Ord...	Invoiced	Invoiced	3/13/2017	BUCKEYE MEX LP		\$269.71
DSO000000174	Customer Ord...	Canceled	Created	3/13/2017	BUCKEYE MEX LP		\$0.00
DSO000000173	Customer Ord...	Invoiced	Invoiced	3/10/2017	BUCKEYE MEX LP		\$2.90
DSO000000172	Customer Ord...	Invoiced	Invoiced	3/10/2017	BUCKEYE MEX LP		(\$2.90)
DSO000000170	Customer Ord...	Invoiced	Invoiced	3/9/2017	BUCKEYE MEX LP		\$2.90
DSO000000167	Customer Ord...	Canceled	Created	3/9/2017	BUCKEYE MEX LP		\$0.00
DSO000000166	Customer Ord...	Invoiced	Invoiced	3/7/2017	BUCKEYE MEX LP		(\$13.33)
DSO000000158	Customer Ord...	Canceled	Created	3/2/2017	BUCKEYE MEX LP		\$0.00
DSO000000157	Customer Ord...	Canceled	Created	3/2/2017	BUCKEYE MEX LP		\$0.00


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

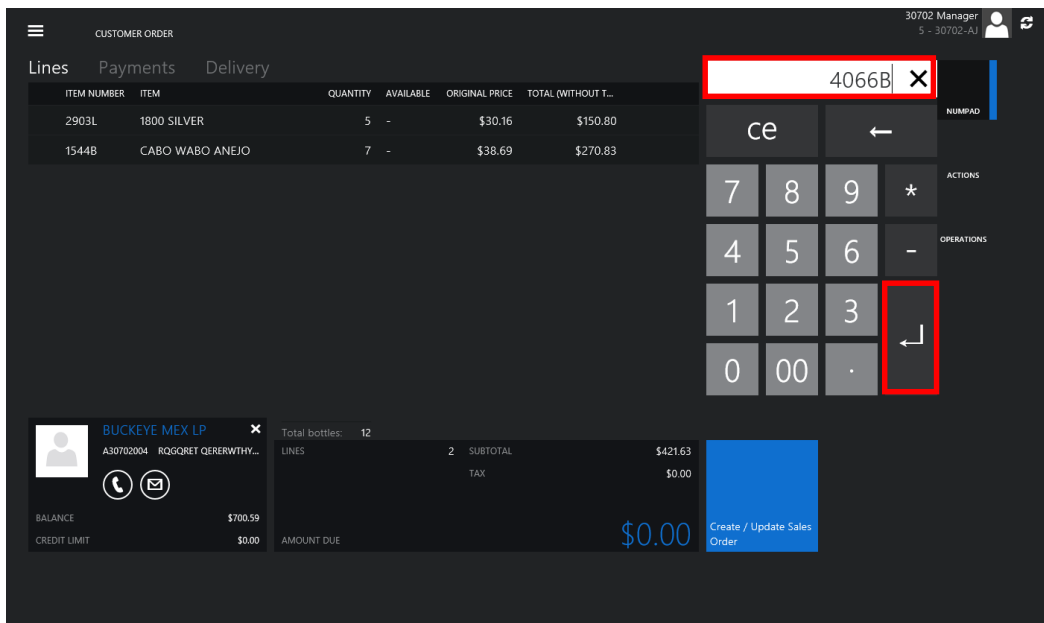
## Add item by number to order

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




9. Enter the item number. In this example enter "4066B."

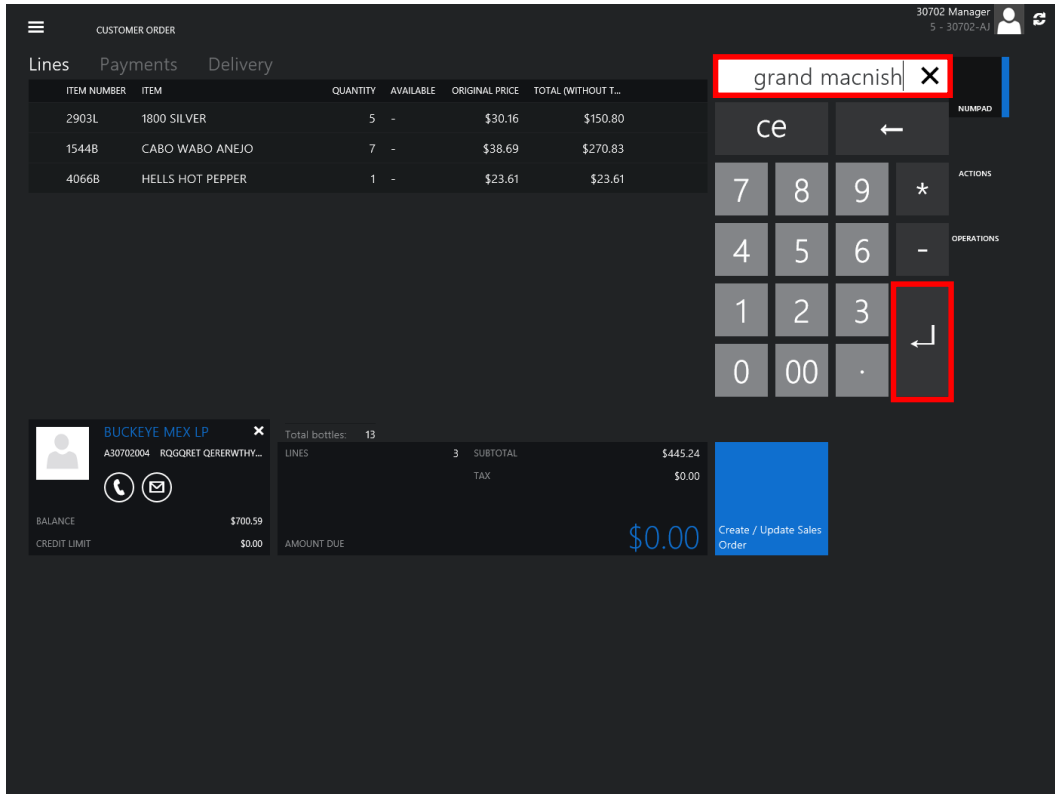
10. Click  to search for the entered item number.



## Add item by description name to order

11. Enter the item description name. In this example enter “grand macnish.”

12. Click  to search for the entered description name.

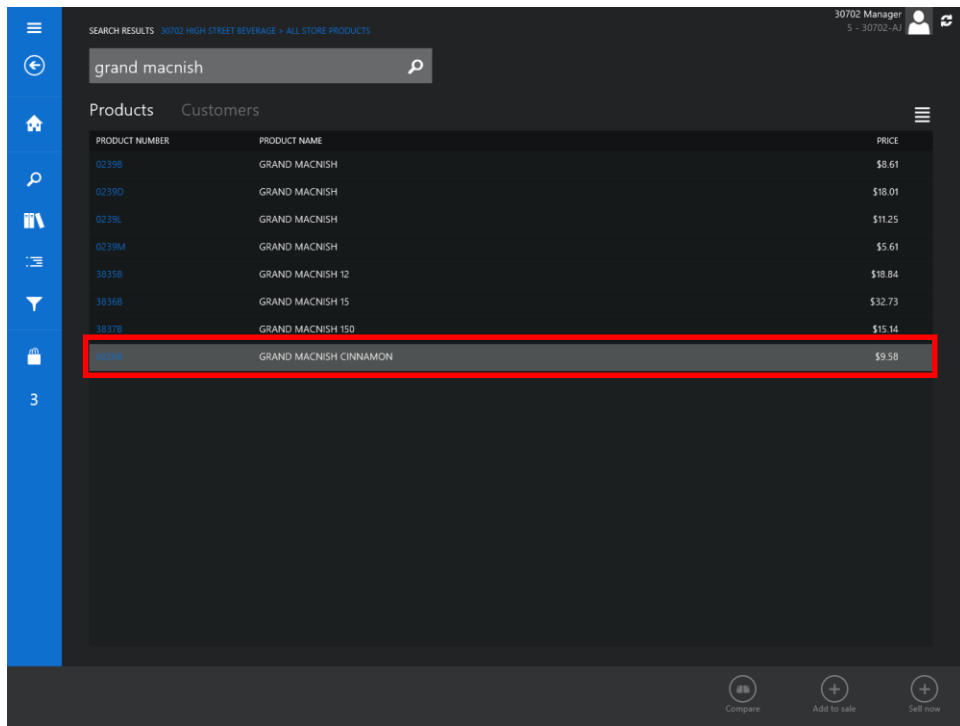



The screenshot displays a mobile POS application interface for a customer order. At the top, it shows 'CUSTOMER ORDER' and the user '30702 Manager'. Below this is a table of order lines:

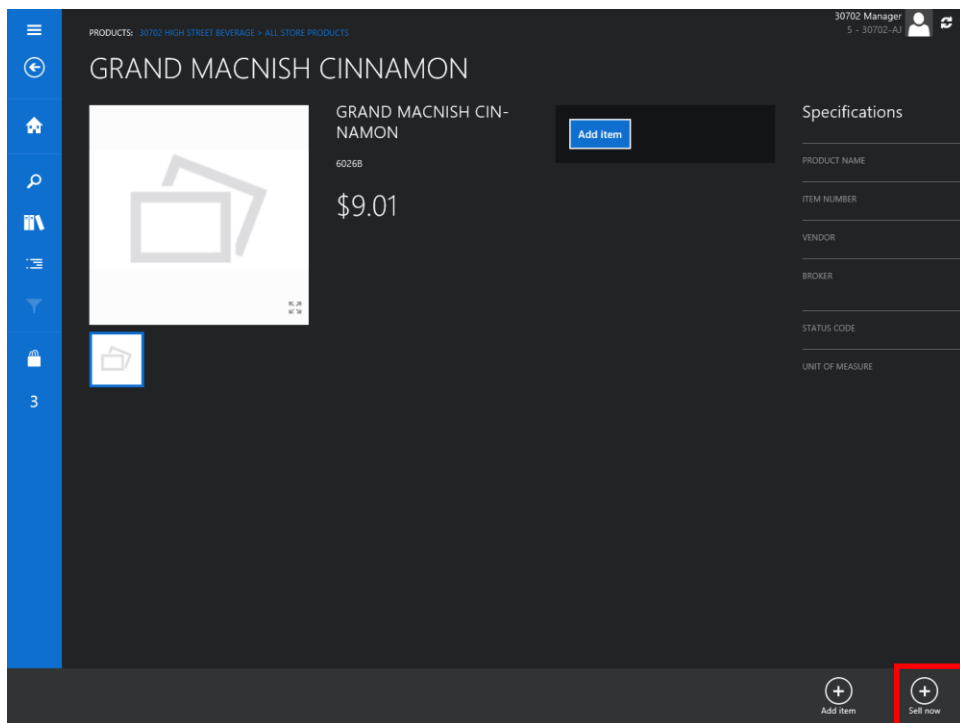
ITEM NUMBER	ITEM	QUANTITY	AVAILABLE	ORIGINAL PRICE	TOTAL (WITHOUT T...
2903L	1800 SILVER	5	-	\$30.16	\$150.80
1544B	CABO WABO ANEJO	7	-	\$38.69	\$270.83
4066B	HELLS HOT PEPPER	1	-	\$23.61	\$23.61

Below the table, there is a search bar containing 'grand macnish' and a numeric keypad. The keypad has a red box around the return key (↵). At the bottom, there is a summary section for 'BUCKEYE MEX LP' with a balance of \$700.59 and a credit limit of \$0.00. The total amount due is \$0.00. A blue button labeled 'Create / Update Sales Order' is visible.

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



14. Press  to add the item to the order.





## Change item quantity on order

15. Press **ACTIONS**.

The screenshot shows a 'CUSTOMER ORDER' screen with a table of items. The 'ACTIONS' button in the right-hand menu is highlighted with a red box.

ITEM NUMBER	ITEM	QUANTITY	AVAILABLE	ORIGINAL PRICE	TOTAL (WITHOUT T...
2903L	1800 SILVER	5	-	\$30.16	\$150.80
1544B	CABO WABO ANEJO	7	-	\$38.69	\$270.83
4066B	HELLS HOT PEPPER	1	-	\$23.61	\$23.61
6026B	GRAND MACNISH CINNAMON	1	-	\$9.01	\$9.01

Buttons: Set quantity, Qty on hand, Void transaction, Void product, Void payment, ACTIONS (highlighted), NUMPAD, OPERATIONS.

Summary: BUCKEYE MEX LP, A30702004, RQGQRET QERERWTHY... Total bottles: 14. LINES: 4, SUBTOTAL: \$454.25, TAX: \$0.00, AMOUNT DUE: \$0.00. BALANCE: \$700.59, CREDIT LIMIT: \$0.00. Create / Update Sales Order.

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

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

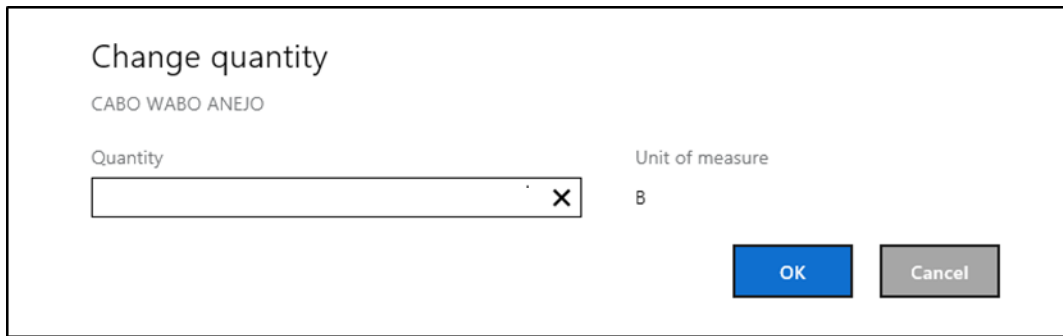
The screenshot shows the same 'CUSTOMER ORDER' screen. The 'Set quantity' button in the right-hand menu is now highlighted with a red box.

ITEM NUMBER	ITEM	QUANTITY	AVAILABLE	ORIGINAL PRICE	TOTAL (WITHOUT T...
2903L	1800 SILVER	5	-	\$30.16	\$150.80
1544B	CABO WABO ANEJO	7	-	\$38.69	\$270.83
4066B	HELLS HOT PEPPER	1	-	\$23.61	\$23.61
6026B	GRAND MACNISH CINNAMON	1	-	\$9.01	\$9.01

Buttons: Set quantity (highlighted), Qty on hand, Void transaction, Void product, Void payment, ACTIONS, NUMPAD, OPERATIONS.

Summary: BUCKEYE MEX LP, A30702004, RQGQRET QERERWTHY... Total bottles: 14. LINES: 4, SUBTOTAL: \$454.25, TAX: \$0.00, AMOUNT DUE: \$0.00. BALANCE: \$700.59, CREDIT LIMIT: \$0.00. Create / Update Sales Order.

18. Enter the quantity desired in the **Quantity** field. In this example, enter "11."



Change quantity

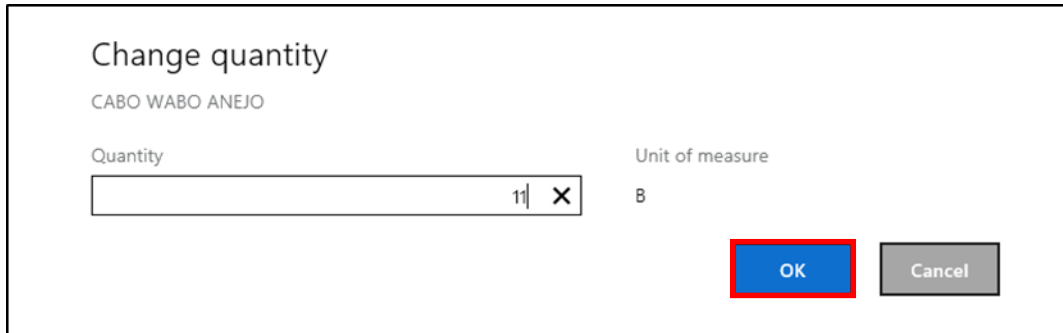
CABO WABO ANEJO

Quantity

Unit of measure  
B

OK Cancel

19. Press  .



Change quantity

CABO WABO ANEJO

Quantity

Unit of measure  
B

OK Cancel

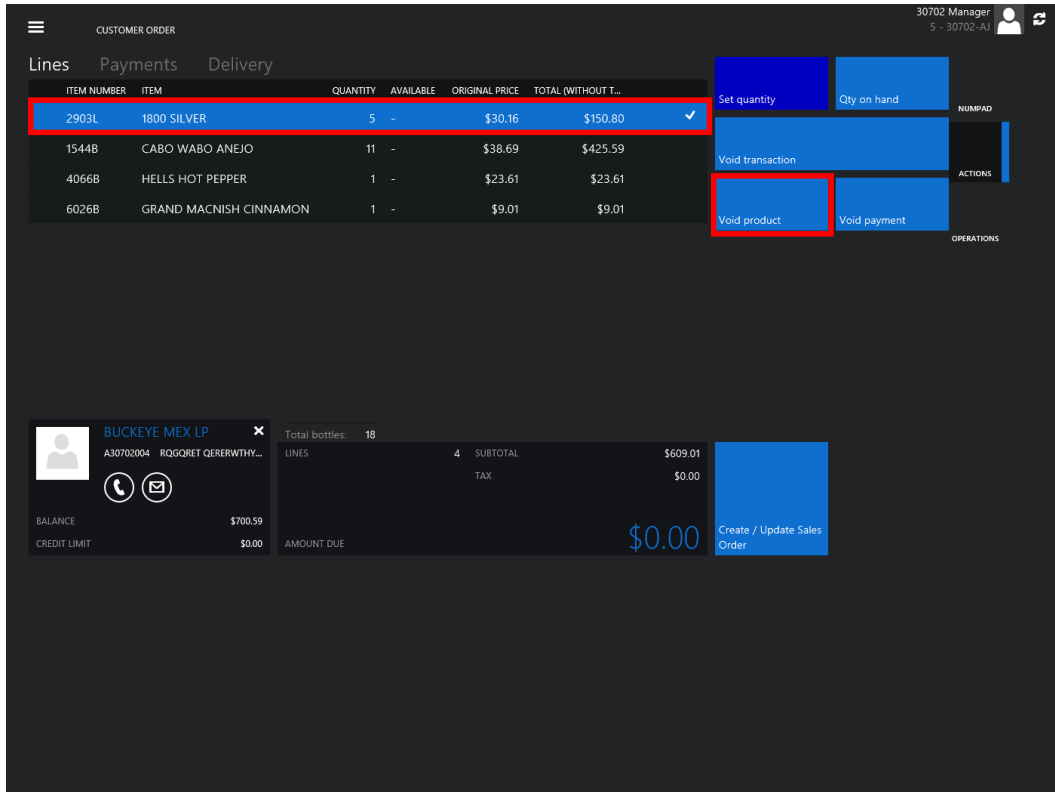
## Delete item from order

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

21. Press  to delete the item.



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



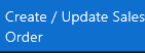
The screenshot displays a 'CUSTOMER ORDER' interface. At the top right, it shows '30702 Manager' and '5 - 30702-AJ'. The main area is divided into 'Lines', 'Payments', and 'Delivery' tabs. A table lists the order lines:

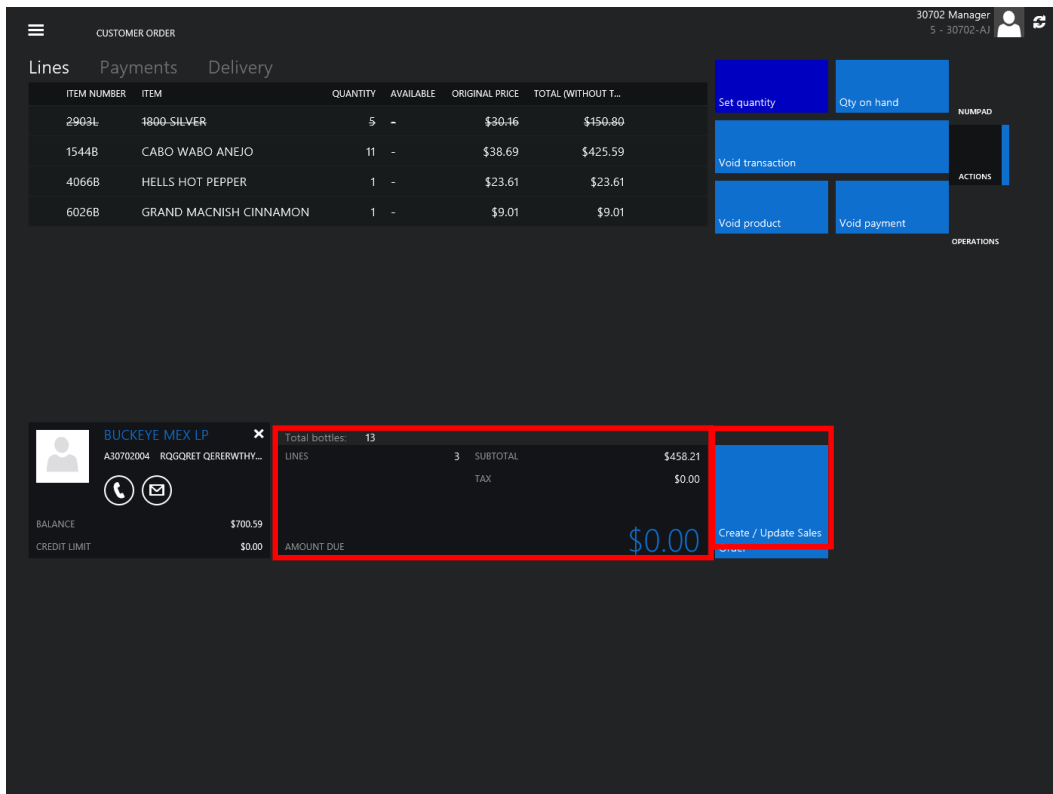
ITEM NUMBER	ITEM	QUANTITY	AVAILABLE	ORIGINAL PRICE	TOTAL (WITHOUT T...
2903L	1800 SILVER	5	-	\$30.16	\$150.80
1544B	CABO WABO ANEJO	11	-	\$38.69	\$425.59
4066B	HELLS HOT PEPPER	1	-	\$23.61	\$23.61
6026B	GRAND MACNISH CINNAMON	1	-	\$9.01	\$9.01

The '2903L' row is highlighted with a red border. To the right of the table is a sidebar with several blue buttons: 'Set quantity', 'Qty on hand', 'Void transaction', 'Void product', and 'Void payment'. The 'Void product' button is highlighted with a red border. Below the table, there is a summary section for 'BUCKEYE MEX LP' with a close button (X). It shows 'Total bottles: 18', 'LINES: 4', 'SUBTOTAL: \$609.01', and 'TAX: \$0.00'. The 'AMOUNT DUE' is displayed as '\$0.00'. A 'Create / Update Sales Order' button is located at the bottom right of the summary section.

## Verify quantity, number of bottles, extended price and Sales Tax

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

23. Press  to save the updates made to the order.



The screenshot shows a POS system interface for a customer order. At the top, it says 'CUSTOMER ORDER' and '30702 Manager 5 - 30702-AJ'. Below this are tabs for 'Lines', 'Payments', and 'Delivery'. A table lists items with columns for 'ITEM NUMBER', 'ITEM', 'QUANTITY', 'AVAILABLE', 'ORIGINAL PRICE', and 'TOTAL (WITHOUT T...'. The items are:

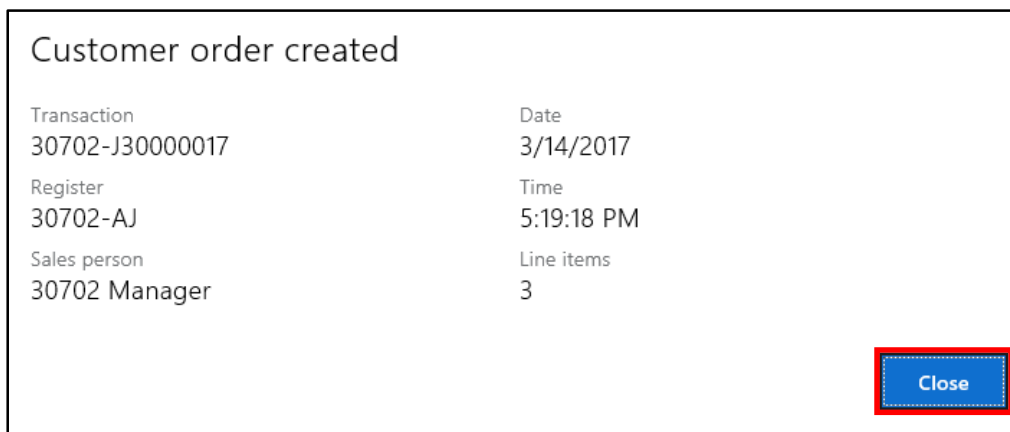
ITEM NUMBER	ITEM	QUANTITY	AVAILABLE	ORIGINAL PRICE	TOTAL (WITHOUT T...
2909L	1800-SILVER	5	-	\$30.16	\$150.80
1544B	CABO WABO ANEJO	11	-	\$38.69	\$425.59
4066B	HELLS HOT PEPPER	1	-	\$23.61	\$23.61
6026B	GRAND MACNISH CINNAMON	1	-	\$9.01	\$9.01

On the right side, there are buttons for 'Set quantity', 'Qty on hand', 'Void transaction', 'Void product', and 'Void payment'. Below the table, there is a summary section for 'BUCKEYE MEX LP' with a 'Total bottles: 13' highlighted in red. The summary includes:

BUCKEYE MEX LP	Total bottles: 13
A30702004 RQGRRET QERERWTHY...	LINES 3 SUBTOTAL \$458.21
	TAX \$0.00
BALANCE \$700.59	AMOUNT DUE \$0.00
CREDIT LIMIT \$0.00	

A 'Create / Update Sales' button is highlighted in red next to the amount due.

24. Press  to close and complete this task.



The screenshot shows a confirmation dialog box titled 'Customer order created'. It contains the following information:

Transaction	30702-J30000017	Date	3/14/2017
Register	30702-AJ	Time	5:19:18 PM
Sales person	30702 Manager	Line items	3

A 'Close' button is highlighted in red at the bottom right of the dialog box.

## Results

You have updated a wholesale order.