



Cancel Wholesale Order

Description

Use this task to cancel a wholesale order in the Wholesale Terminal. This job aids displays cancelling a created order that has not been invoiced and also cancelling an order during order entry.


Trigger

Perform this task when a need arises to cancel an order in the Order Status of "Created" and also cancel during order entry.

Prerequisites

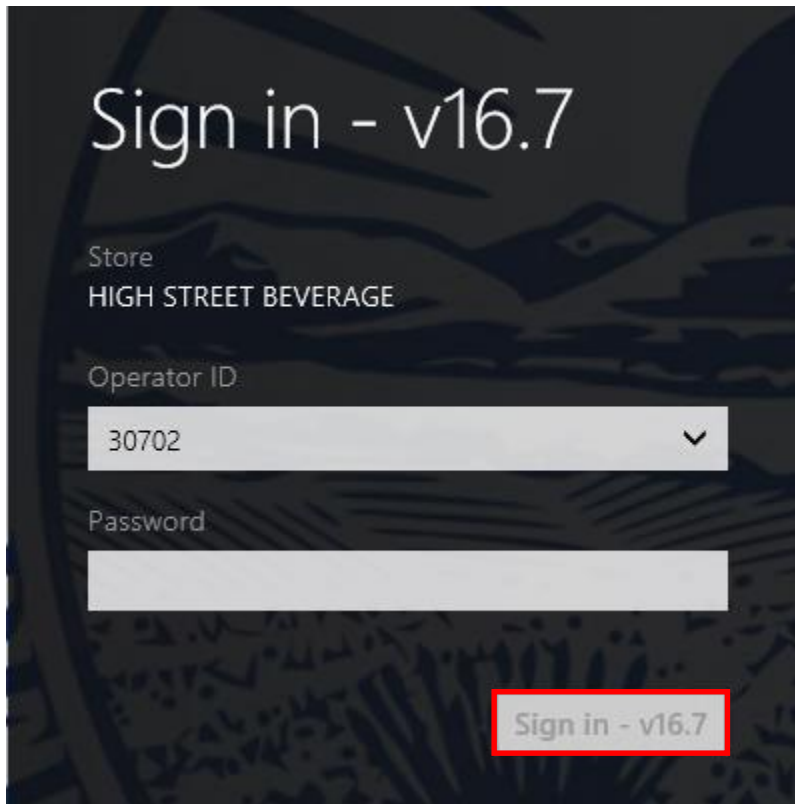
The system has orders in "Created" status.

Helpful Hints

- Orders in "Invoiced" or "Canceled" status cannot be canceled. Canceled orders remain in the system and can be viewed in the future
- 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.



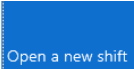
Sign in - v16.7

Store
HIGH STREET BEVERAGE

Operator ID
30702

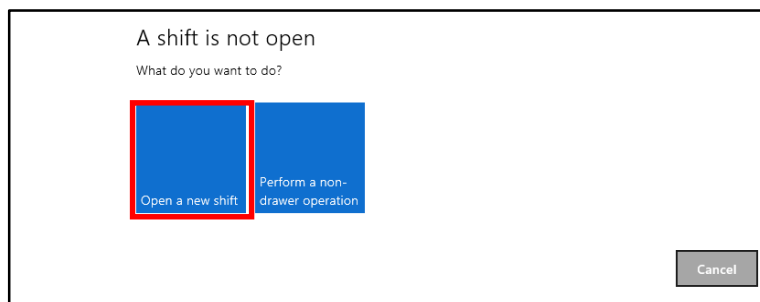
Password

Sign in - v16.7

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

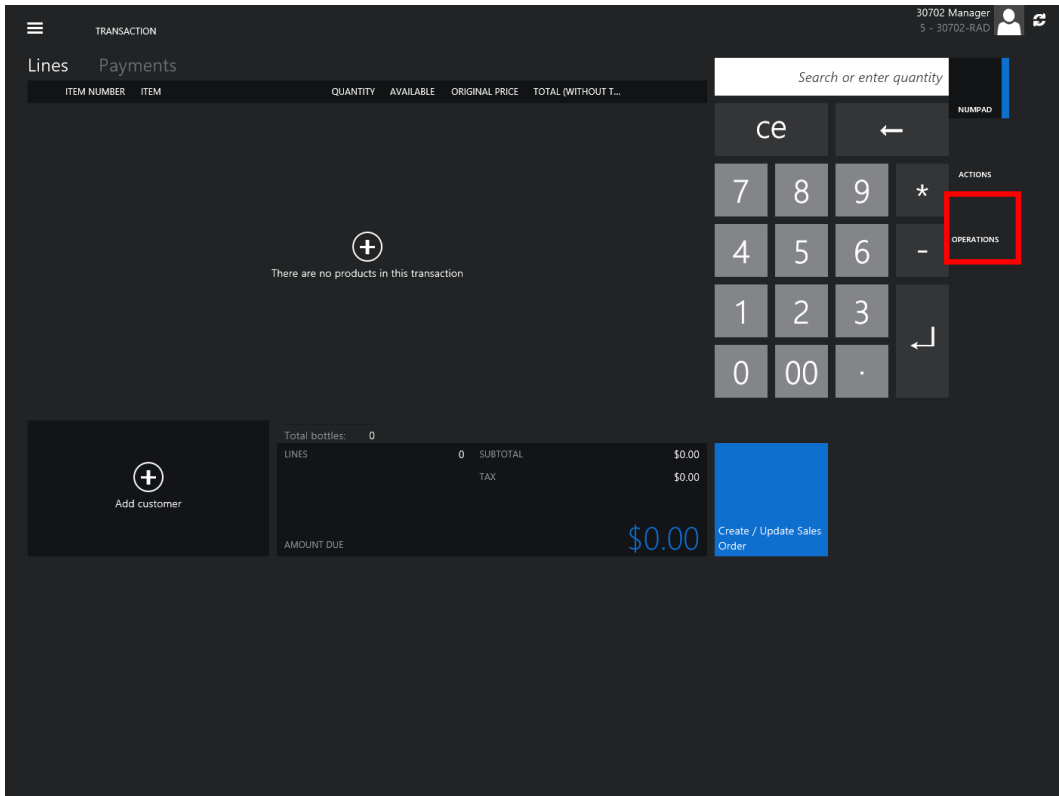
What do you want to do?

Open a new shift

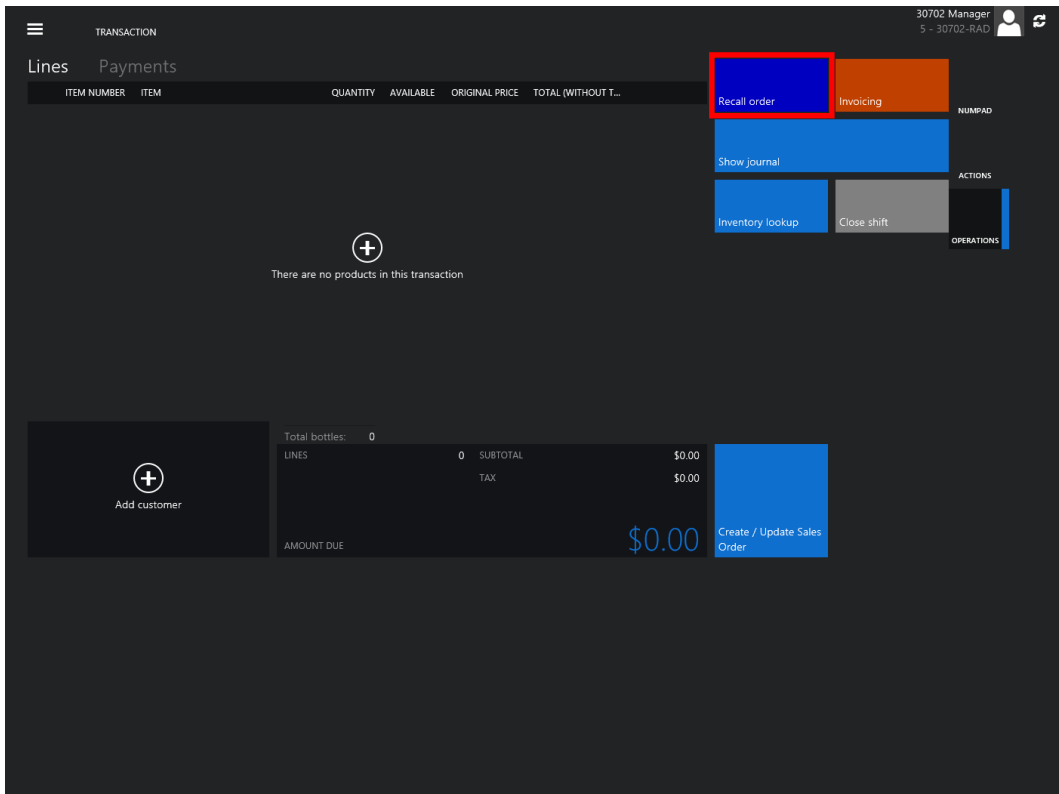
Perform a non-drawer operation

Cancel

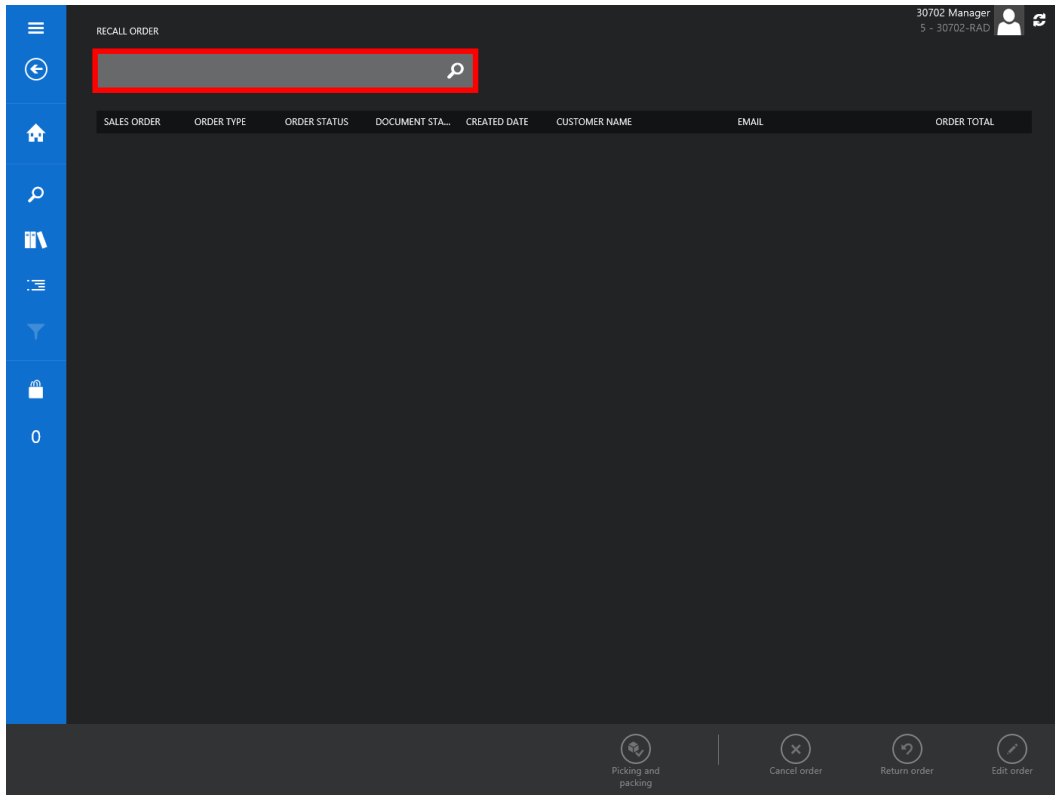
3. Press **OPERATIONS**.



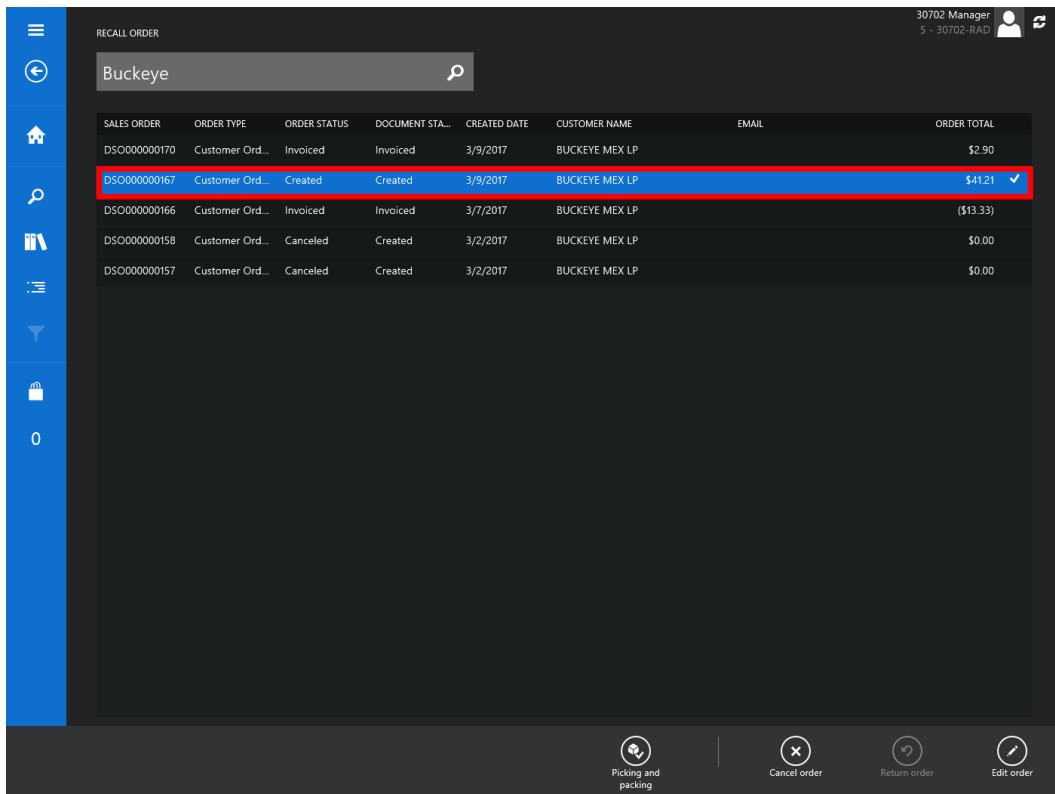
4. Press **Recall order** to recall the previous order.



5. Enter the appropriate customer name in the **Search** field. In this example, enter "Buckeye."



6. Select the appropriate order to cancel. In this example, select "DSO000000167."



7. Press  to cancel the order.



The sales order must be in “Created” status in order to cancel the order.

SALES ORDER	ORDER TYPE	ORDER STATUS	DOCUMENT STA...	CREATED DATE	CUSTOMER NAME	EMAIL	ORDER TOTAL
DSO000000170	Customer Ord...	Invoiced	Invoiced	3/9/2017	BUCKEYE MEX LP		\$2.90
DSO000000167	Customer Ord...	Created	Created	3/9/2017	BUCKEYE MEX LP		\$41.21 ✓
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


8. Press  to complete this task.

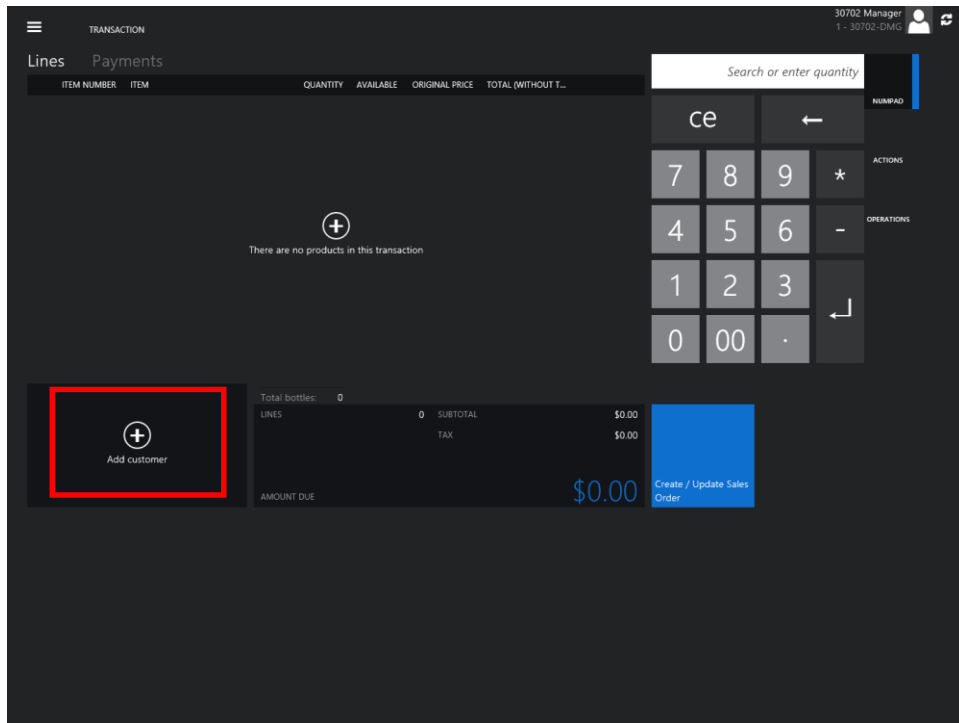
Customer order cancelled

Transaction	Date
30702-D30000011	3/10/2017
Register	Time
30702-RAD	10:03:14 AM
Sales person	Line items
30702 Manager	1

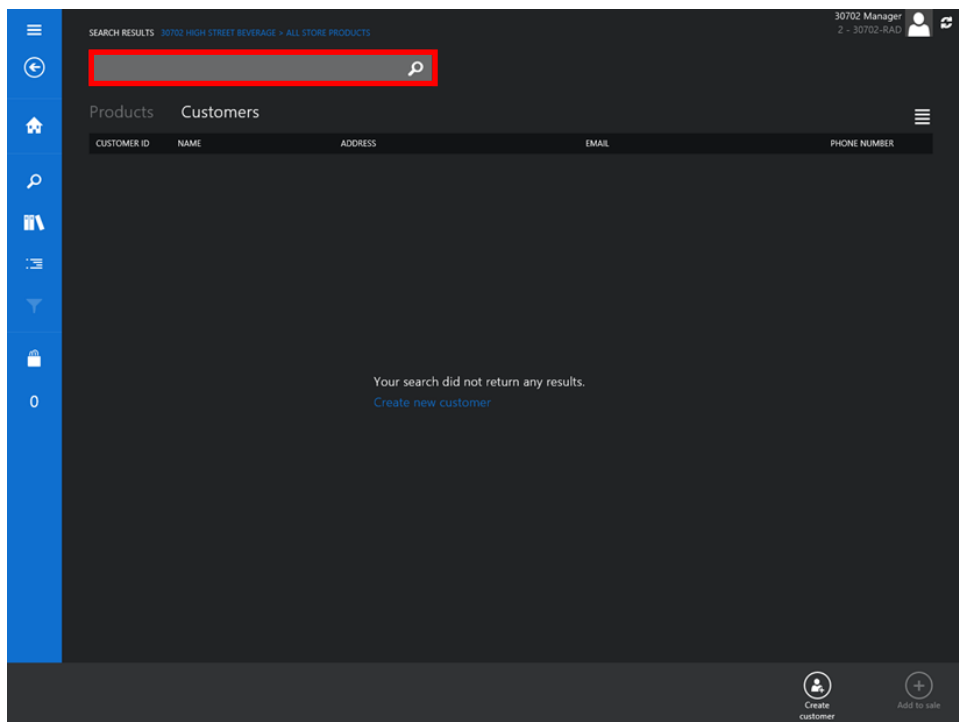
Close

Canceling the order during order entry.

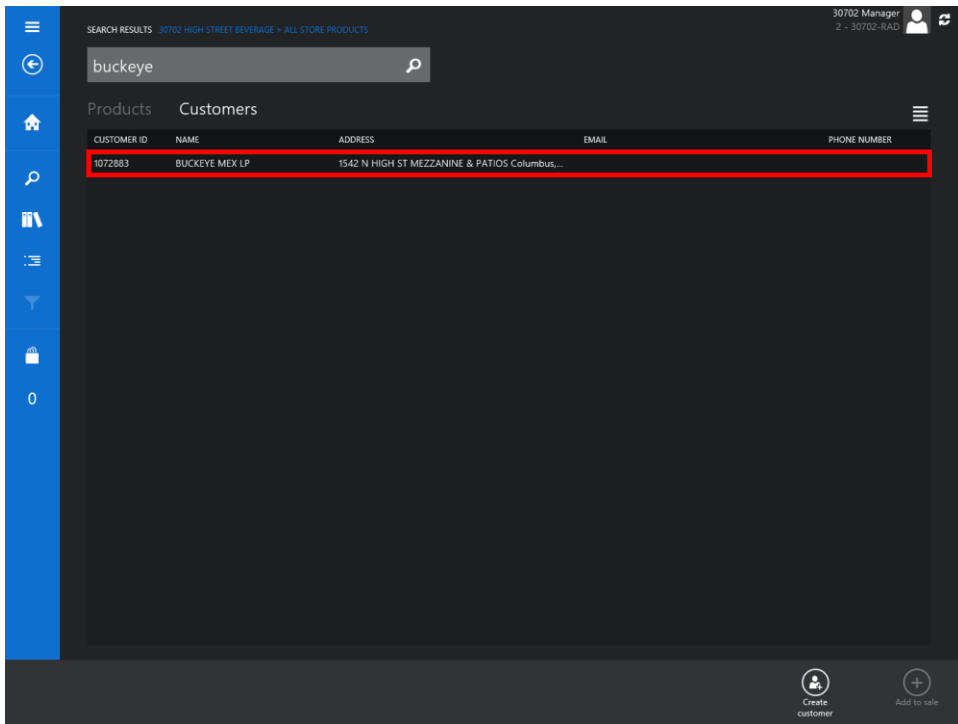
1. Press  to add a customer to the order.




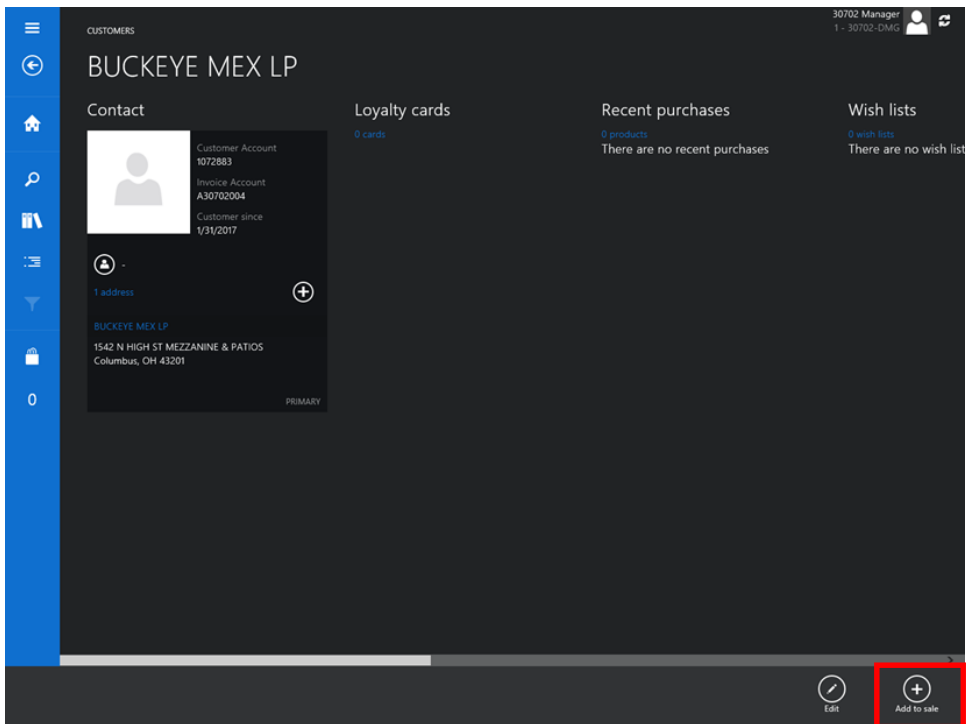
2. Enter the appropriate customer name in the **Search** field. In this example, enter "buckeye."



3. Select the appropriate customer record.




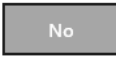
4. Press  to add the customer to the sale.




4. Press  to verify the customer's age.

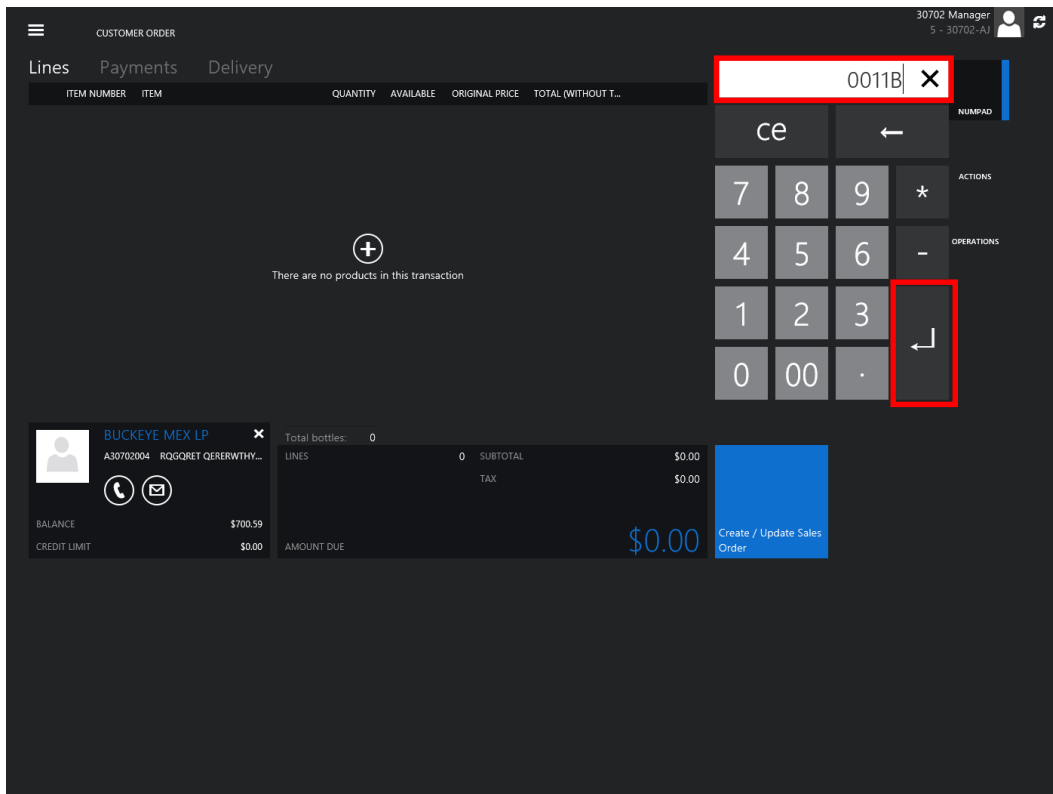
Verify Customer Date of Birth

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

5. Enter the product number in the Numpad. In this example, enter "0011B."

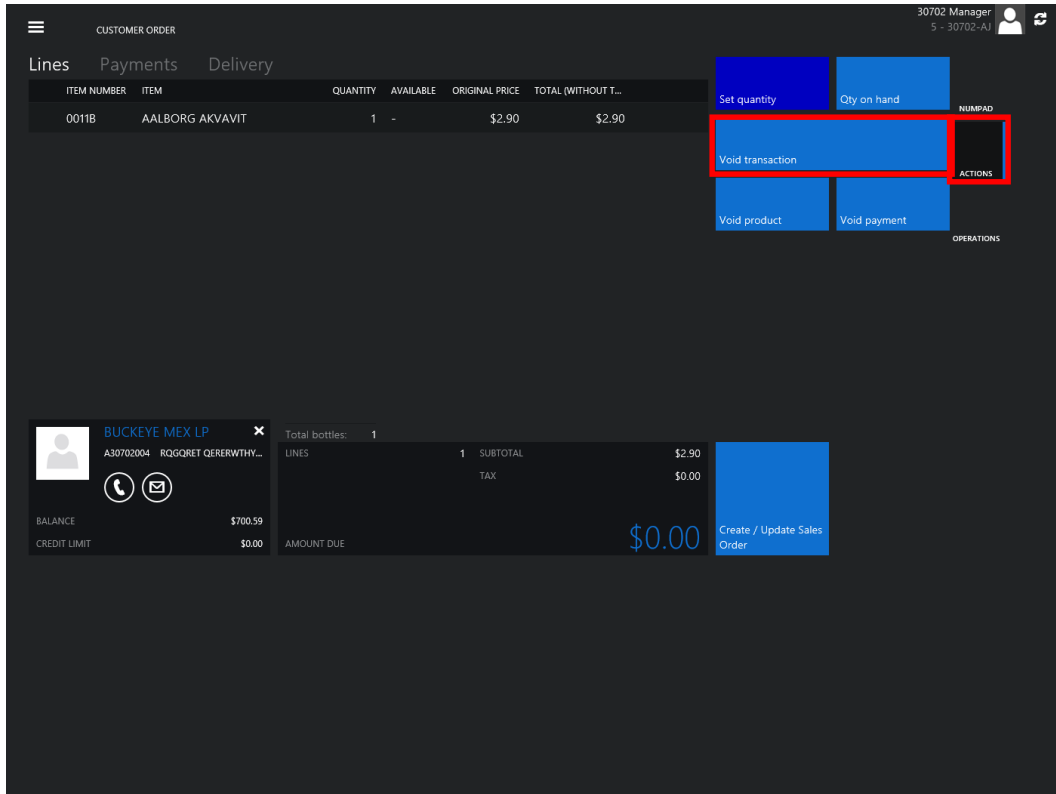
6. Press  to add the product to the order.



The screenshot shows a POS system interface. At the top, it says "CUSTOMER ORDER" and "30702 Manager". Below that, there are tabs for "Lines", "Payments", and "Delivery". A table with columns "ITEM NUMBER", "ITEM", "QUANTITY", "AVAILABLE", "ORIGINAL PRICE", and "TOTAL (WITHOUT T..." is visible. A red box highlights the input field containing "0011B" and a close button "X". Below the input field is a numpad with numbers 0-9, a decimal point, and a back arrow. A red box highlights the enter key (a key with a right arrow and a down arrow) on the numpad. The main area of the screen shows a plus sign icon and the text "There are no products in this transaction". At the bottom, there is a customer profile for "BUCKEYE MEX LP" with contact icons. To the right, there is a summary section with "Total bottles: 0", "LINES 0", "SUBTOTAL \$0.00", "TAX \$0.00", "BALANCE \$700.59", "CREDIT LIMIT \$0.00", and "AMOUNT DUE \$0.00". A blue button labeled "Create / Update Sales Order" is also present.

7. Press **ACTIONS** tab to access the Actions menu.

8. Press **Void transaction** to cancel the order entry.



9. Press **Yes** to cancel the transaction.



Results

You have canceled an order in an Order Status of “Created” and also canceled a wholesale order during order entry.