



Invoice a Wholesale Order

Description

Use this task to invoice a wholesale order in the Wholesale Terminal.


Trigger

Perform this task when a wholesale order needs to be invoiced.

Prerequisites

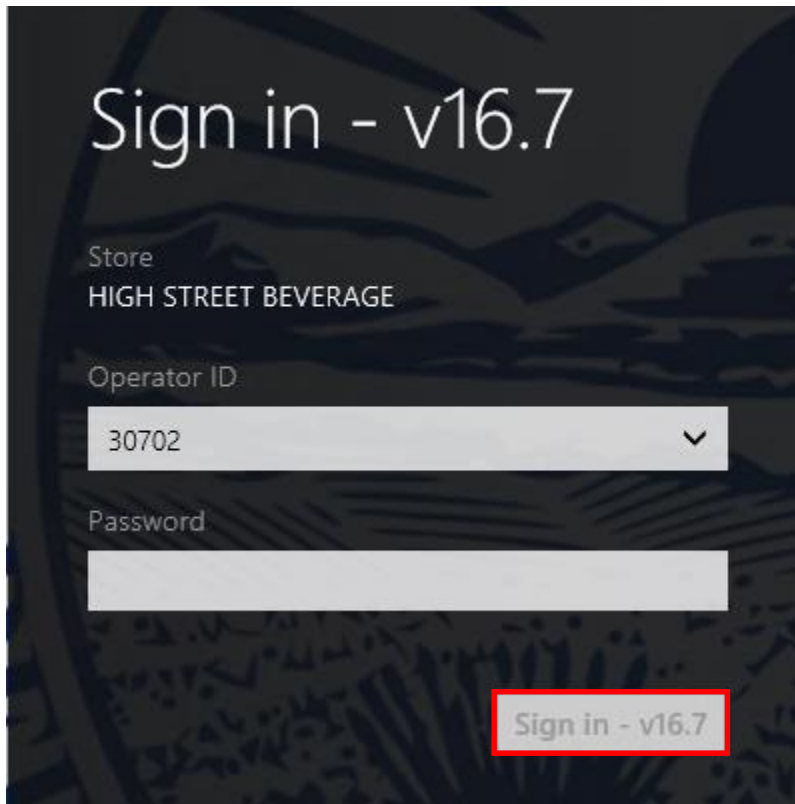
There are wholesale orders in the system.

Helpful Hints

- After order payment is collected, you must invoice (or Post) the order in the Wholesale Terminal.
- All actions performed in this job aid can be done using the keyboard and mouse
Example:
 - 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

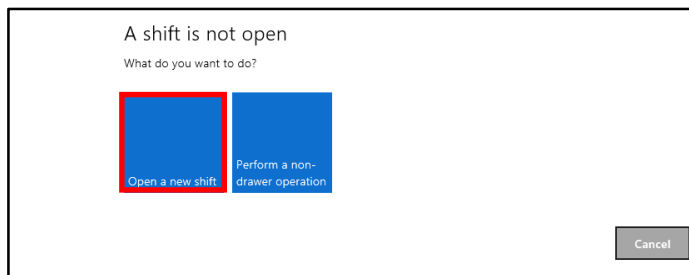
Password

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

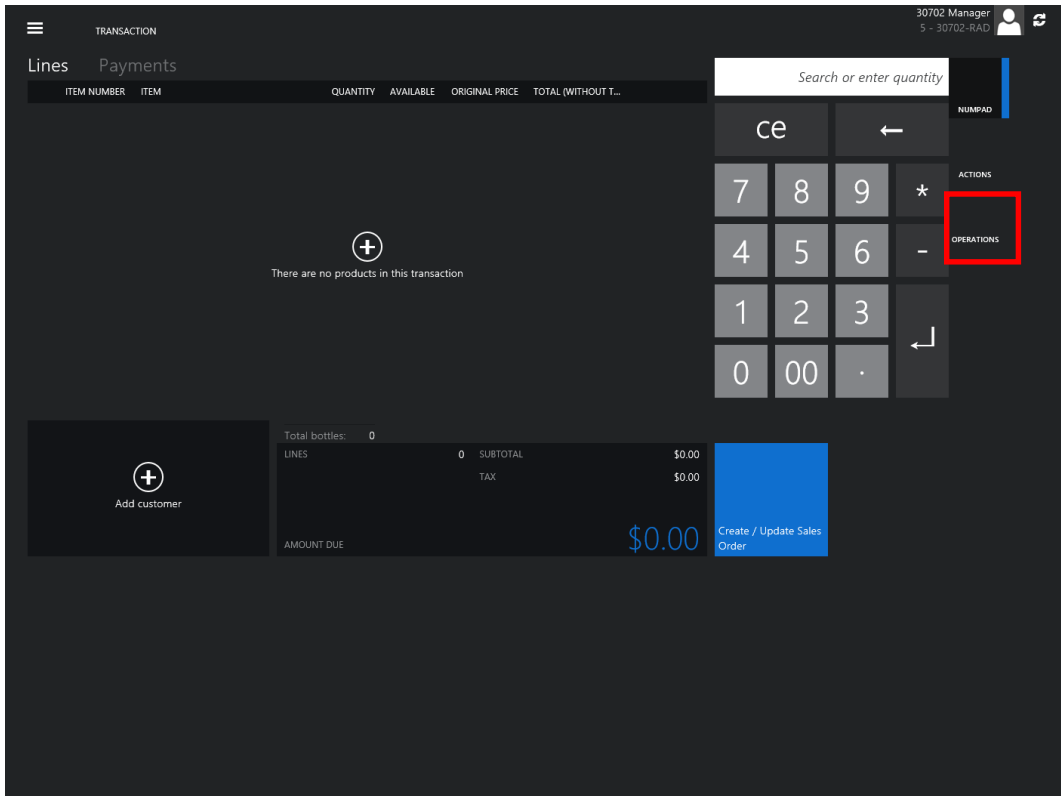
What do you want to do?

Open a new shift

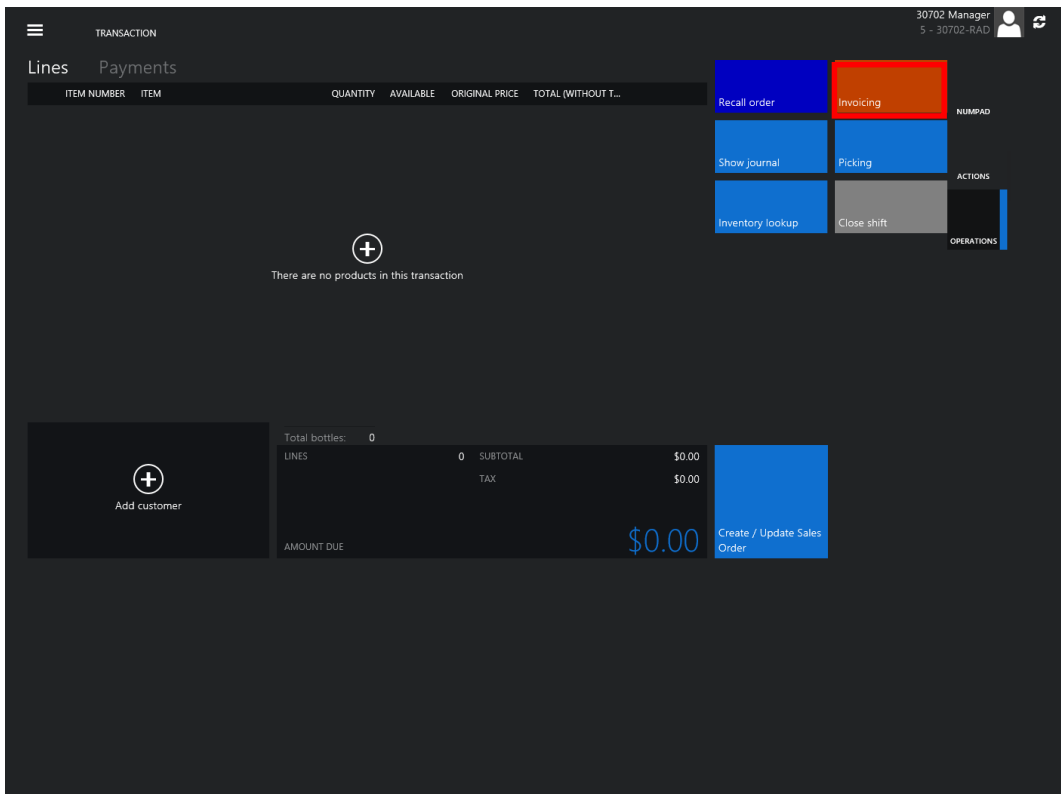
Perform a non-drawer operation

Cancel

3. Press



4. Press **Invoicing** to display the *Invoice Wholesale Orders* screen.



5. Select the appropriate order to invoice. In this example, select sales order number "DSO000000171."


INVOICE AUTOMATION 30702 Manager 5 - 30702-RAD

Invoice Wholesale Orders

CUSTOMER NAME	SALES ORDER	CREATED DATE	QUANTITY	ORDER TOTAL
BUCKEYE MEX LP	DSO000000172	3/10/2017	-1	-2.90
4275 LLC Transient	DSO000000171	3/9/2017	20	331.40 ✓
4275 LLC Transient	DSO000000169	3/9/2017	5	82.85
4275 LLC Transient	DSO000000168	3/9/2017	10	165.70
4275 LLC Transient	DSO000000162	3/3/2017	1	13.33
4275 LLC	DSO000000156	3/1/2017	4	66.28
4275 LLC	DSO000000155	3/1/2017	1	16.57
4275 LLC	DSO000000154	3/1/2017	2	33.14
4275 LLC	DSO000000153	3/1/2017	1	16.57
4275 LLC	DSO000000097	2/14/2017	2	22.78

Total open 45 \$745.72
Total selected 20 \$331.40
Total invoiced today 0 0

Process selected invoice

6. Press  to process the invoice.

INVOICE AUTOMATION 30702 Manager 5 - 30702-RAD

Invoice Wholesale Orders

CUSTOMER NAME	SALES ORDER	CREATED DATE	QUANTITY	ORDER TOTAL
BUCKEYE MEX LP	DSO000000172	3/10/2017	-1	-2.90
4275 LLC Transient	DSO000000171	3/9/2017	20	331.40 ✓
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4275 LLC Transient	DSO000000162	3/3/2017	1	13.33
4275 LLC	DSO000000156	3/1/2017	4	66.28
4275 LLC	DSO000000155	3/1/2017	1	16.57
4275 LLC	DSO000000154	3/1/2017	2	33.14
4275 LLC	DSO000000153	3/1/2017	1	16.57
4275 LLC	DSO000000097	2/14/2017	2	22.78


Total open 45 \$745.72
Total selected 20 \$331.40
Total invoiced today 0 0

Process selected invoice

7. Press  to invoice the item.

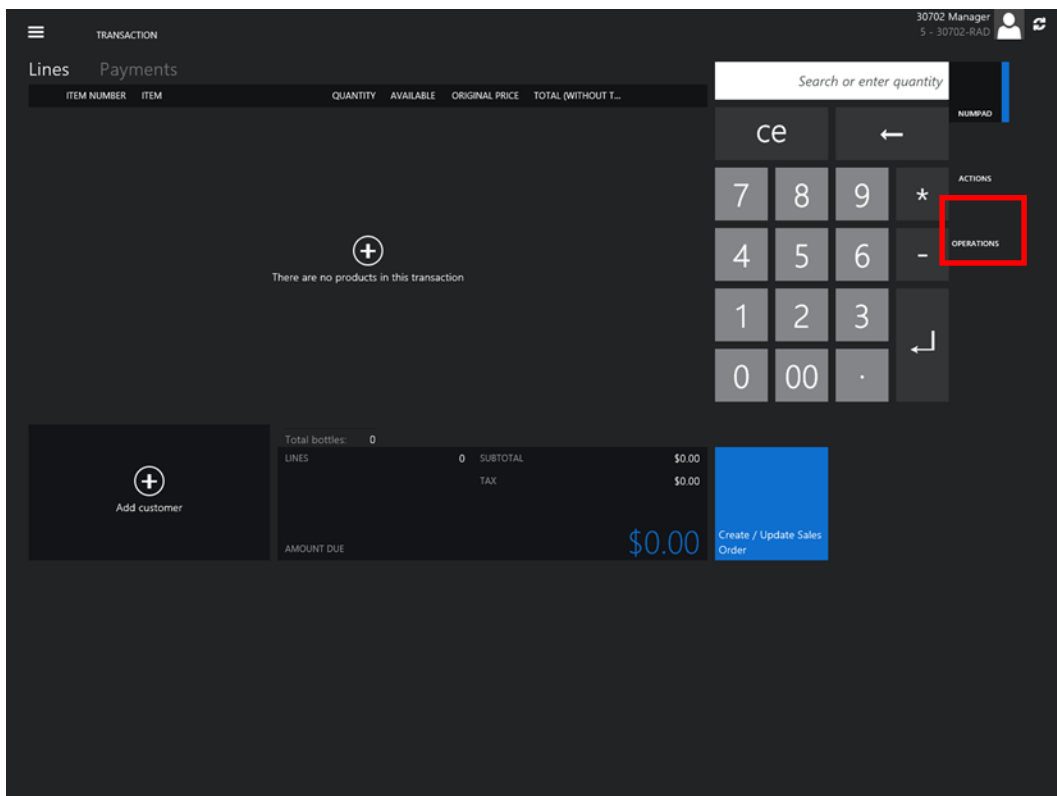
Customer order picked up

Transaction 30702-D30000013	Date 3/10/2017
Register 30702-RAD	Time 11:47:49 AM
Sales person 30702 Manager	Line items 1



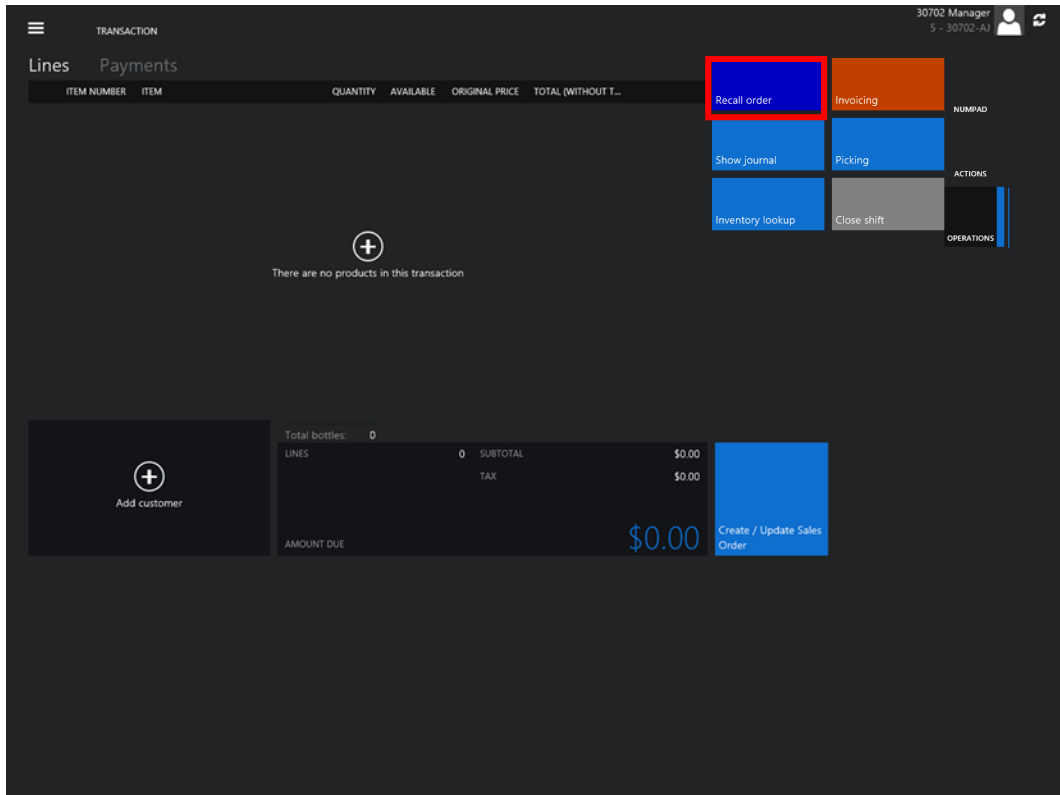
To Verify a wholesale order is invoiced

8. Press  .



The screenshot shows a POS system interface for a transaction. At the top, it displays 'TRANSACTION' and '30702 Manager 5 - 30702-RAD'. Below this, there are tabs for 'Lines' and 'Payments'. A search bar contains 'ce'. A keypad is visible on the right side, with the 'OPERATIONS' button highlighted in a red box. The main area shows 'There are no products in this transaction' with a plus icon. At the bottom, there is a summary section with 'Total bottles: 0', 'LINES 0', 'SUBTOTAL \$0.00', 'TAX \$0.00', and 'AMOUNT DUE \$0.00'. A blue button labeled 'Create / Update Sales Order' is also present.

9. Press **Recall order** to display a list of orders.

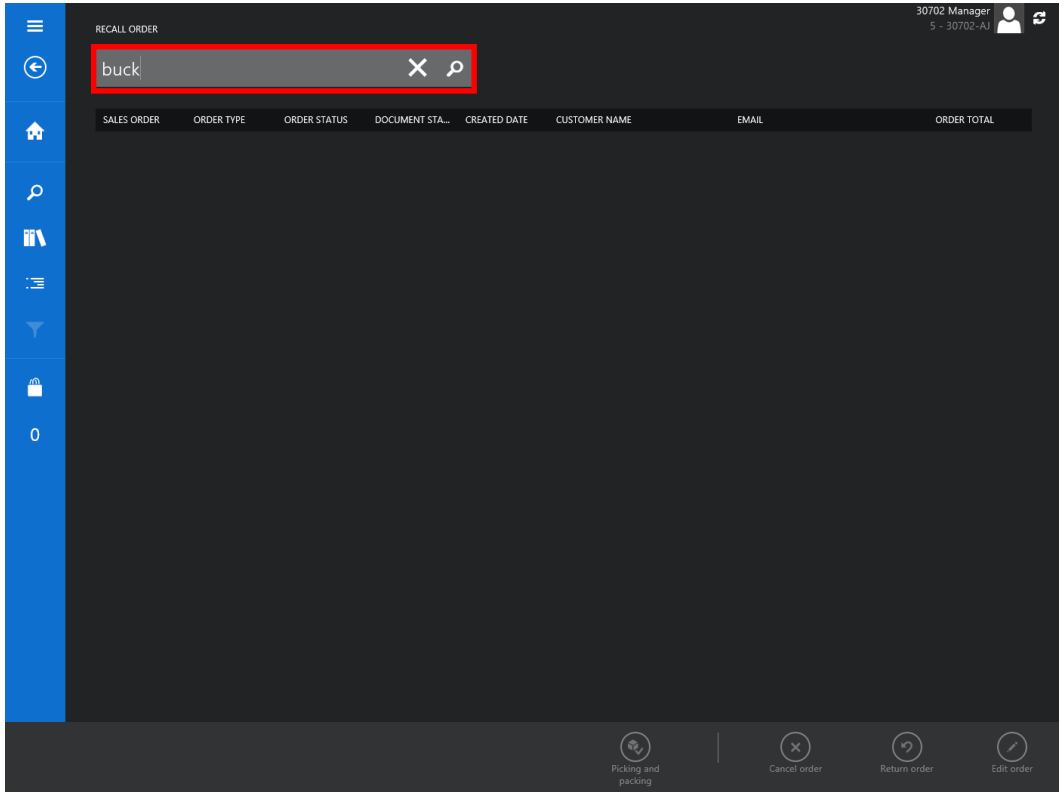


10. Enter the appropriate customer's name in the **search** field. In this example enter "buck."

11. Press **Enter** on the keyboard.



This will list all orders with the term "buck" in the customer name.



12. Verify the relevant order status.

30702 Manager
5 - 30702-AJ

RECALL ORDER

buck

SALES ORDER	ORDER TYPE	ORDER STATUS	DOCUMENT STA...	CREATED DATE	CUSTOMER NAME	EMAIL	ORDER TOTAL
DSO000000184	Customer Ord...	Created	Created	3/15/2017	BUCKEYE MEX LP		\$35.79
DSO000000181	Customer Ord...	Created	Created	3/14/2017	BUCKEYE MEX LP		\$458.21
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

Results

You have invoiced a wholesale order.