LEADERS HOLDING CO.™
Est. 1971

Writing a Sale

A Sales Order Will Not Reserve or, Order Merchandise without a Deposit

Writing a sale is the exciting part of helping guests! NetSuite has multiple paths to get to write a sale.

1. You can convert a quote into a sale
2. You can write a sale from a customer record

Please note that exchange Orders must be written from the Invoice. See Exchanges, Credits and Returns in the Procedure Manual

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Convert A Quote

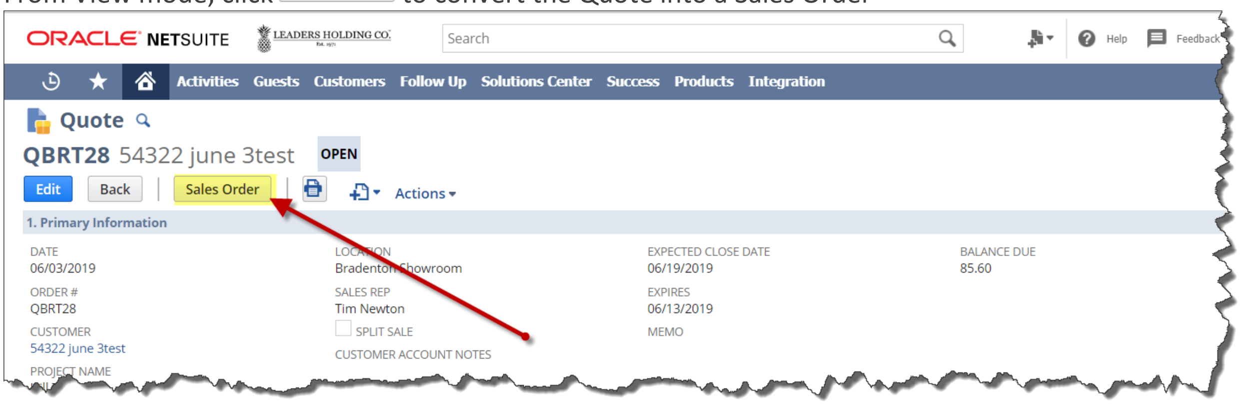
NetSuite has a robust CRM (customer relationship management) platform. Top-performing sales team members will use it to track the interactions and interests of their guests and previous customers to stay in touch and create more sales. This will include converting Quotes directly into Sales Orders.

Quick Path: Open Quote / Review and Adjust Items as Necessary in Edit Mode / Save to View Mode/ Click New Sales

1. Find the Quote
    a. You can look up an existing quote from the Customer Record
        i. Customer Record / Sales Tab/ Transactions Subtab

2. Review the Quote and make changes in Edit mode
    a. Save when complete

3. From View mode, click Sales Order to convert the Quote into a Sales Order



4. You will now only have to complete
    a. Tab "2. Items"
        i. Estimated Ready Date
    b. Tab "3. Shipping/Billing/Signature"
        i. Select Ship To
        ii. Select Bill To
        iii. Select Terms
        iv. Select Delivery Method

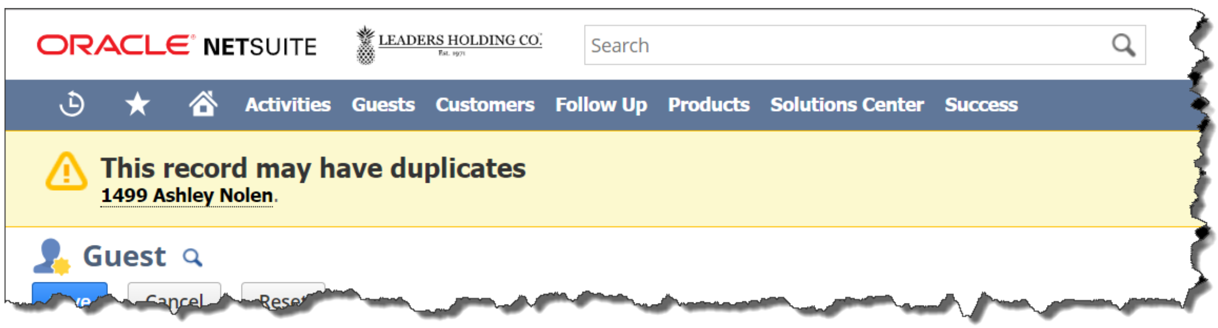
1. **Create a Customer Record**

   Writing a sale without a quote is quick and easy. When creating a customer record, pay attention to duplicate detection. A customer record that has duplicates will have a yellow warning bar a the top of the screen.

   Quick Path: Home Screen / Create New Customer / Create new customer record and Save / New Sale

Duplicate Found

If a duplicate record is found, a yellow bar will appear at the top of your screen. This means that another customer record shares the same phone number as the record you are creating.

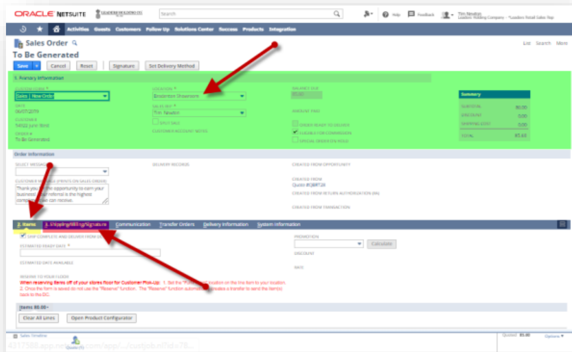


1. Confirm with your guest you entered their information correctly.
2. Verify if they know the duplicate entity
   a. If not, try and use another phone number
   b. If they know the other entity, then click on the name in the yellow duplicate detection bar and update the record.
3. Save
4. While in view mode, click New Sale

2. Writing the Sale

Writing a sale in NetSuite is easy. There are three areas you need to be concerned with.

1. Primary Information
2. Items
3. Signature/Billing/Delivery



1. Primary Information

- ✓ Location
  - ○ Location will already be set as a default for your customer record. If you are helping at another location, you will have to change this to the location you are helping at manually
- ✓ Sales Rep
  - ○ The Sales Rep name will default to the team member's session that is open. If you are writing a sale on another team member's log-in, you will have to change this manually.

2. Items

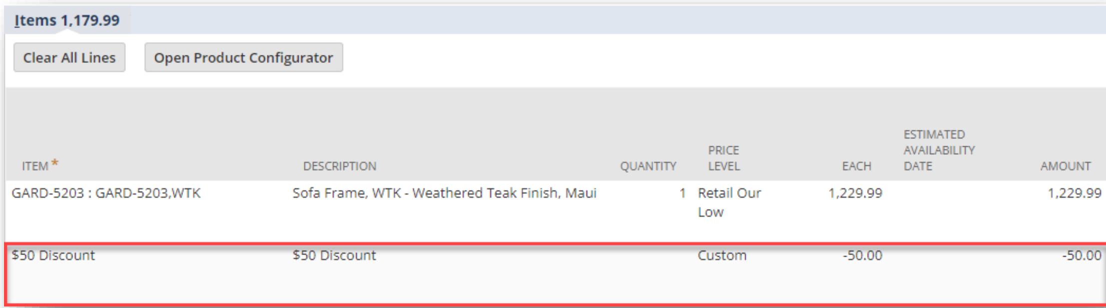
- ✓ Use the Open Product Configurator button to add new items to the sales order.
  - ○ Be patient, the configurator is sorting through many options only to show you the options currently available.
  - ○ Note that you can add items directly to the Sales Order by typing them in the line. Typing directly on the line is not recommended other than special circumstances outlined in further training.
- ✓ Estimated Ready Date
  - ○ Once you have entered the product, complete this field. The Estimated Ready Date field drives your customer follow-up reports and helps you manage open orders.

3. Shipping/Billing/Signature

- ✓ Ship To Select
  - ○ The Ship To address is the address product will be delivered to or picked up from
- ✓ Select the Payment Terms
- ✓ Click the Set Delivery Method button and follow the prompts

Promotions

Current promotions automatically populate on a sales order as you add items that apply to a current sale. Promotion discounts can be removed by deleting the line item before the sales order is saved, or by going back to a sales order in Edit mode and deleting the line.



3. Click Save

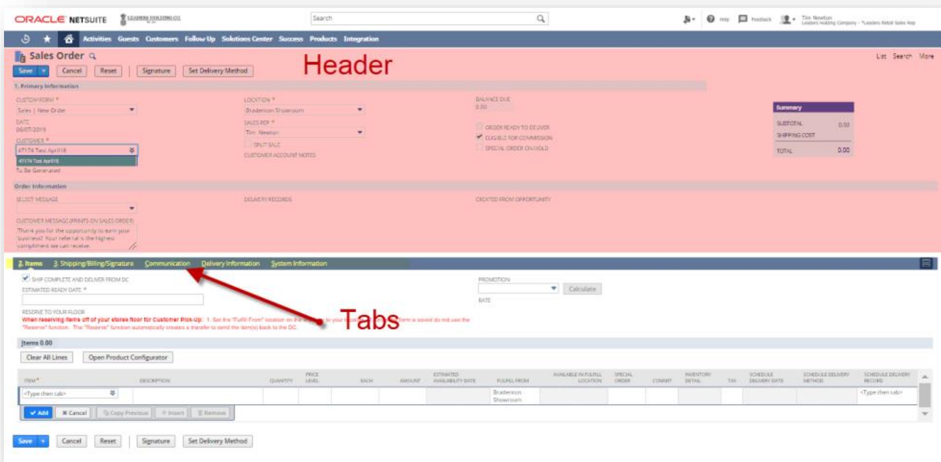
The Sale order is now **PENDING APPROVAL**. You must take a deposit for the order to approve.

4. Take Payment to approve the Sales Order

Note: If you are trying to write an exchange, credit, or return, please initiate it from the Invoice. Follow 5.10 Exchanges Returns Credits Restocking procedure for detailed instruction.

The Sales Order Form

The sales order form is made up of the Header and Tabs.



- ✓ Header
  - Customer Record
  - Location
  - Sales Representative
  - Total
- ✓ Tabs
  - Items by Line
  - Shipping & Billing
  - Promotions
  - Communication
  - Delivery Information
  - System Information

1. Primary Information

Field Name	What?	Why?
Date	Date the Sales Order was created	
Order#	Sales Order Number	To Identify the particular sales order
Customer	Customer name	To identify who the Sales Order was written for
Phone Number	Customer phone number	To be able to communicate with the guest
Location	Location the order was written from	To identify the store location where the sale was written and to track metrics and store success
Sales Rep	Sales Representative who wrote the order	To keep track of success and pay commission
Customer Account Notes	Notes associated with the customer's customer record	Note for a customer that will show on every transaction
Balance Due	The amount owed on a sales order	NOTE: THIS AMOUNT CAN BE INCORRECT IF THE SALES ORDER IS ALREADY INVOICE/BILLED
Item(s) Ready To Deliver	Denotes whether items are ready to be scheduled for fulfillment.	If Ship Complete Is Checked: All items must be ready to be fulfilled for the ready-to-deliver checkbox to check. If all items are scheduled on a delivery record, then the Ready to Deliver checkbox will not be checked. If Ship Complete is Not Checked and at least one item is ready to be fulfilled, the Ready to Deliver checkbox will be checked. If the items ready to be fulfilled are scheduled on a delivery record, the Ready to Deliver checkbox will not be checked until another item on the sales order becomes ready to be fulfilled.
Eligible for Commission	If not checked, it will not pay when fulfilled.	This box is used by leadership in instances where policy was disregarded and a sale has a negative financial impact on the organization.
Special Order On Hold	If checked, order will not be placed with the factory	This field is used by purchasing when they cannot confidently place an order with a manufacturer. While they are waiting for a clear response from the sales professional, they will use this box to stop the order from proceeding.
Summary	Summary of charges associated with the order	
Select Message/ Customer Message	Dropdown of prewritten messages	Prints on the sales order
Message Text	Are displaying the test of a message that will print on the sales order	You can free-form type in this box
Delivery Records	If items on a sales order are set for fulfillment, the record will show here	Click on the record to edit, change or delete it

2. Items Tab

The Items tab is a summary of the items the customer is buying when they will be ready and any promotions that apply. Click the field names for detailed descriptions. Let's take a detailed look at the line items. They will display a little differently in Edit vs View mode.

Field Name	What?	Why?
Ship Complete	Ship Complete Checkbox	Check = Ship all items together Unchecked = Ship not all items together
Estimated Ready Date	Estimated Date all items on the sales order will be available for the customer	To meet customer expectations
PO Forecast	Forecast for the next available date for its SKU and the quantity you want	Provide clarity to customer on next available date of the item
Reserve To Your Floor Instructions	Special Instructions if you are trying to reserve from your floor and do a customer pick up in your store	Follow these instructions so product does not accidentally transfer to the DC
Items	Total of all the items on the sales order	
Item	This is where the SKU displays.	Notice that the Base SKU shows up before the configured SKU. NetSuite is saying, "You are ordering this product with these options."
Description	A detailed description of what is being ordered	You should rarely edit or change these fields. They should be populated from the configurator 99% of the time. Read customer-owned merchandise (COM) to learn about the 1%
Brand	An image of the brand logo for the item will show here	
Item & Options	This is a black-and-white thumbnail image of the item ordered and color thumbnails of the options	This is for a visual reference of what was ordered
Quantity	Number of items ordered	Click on the quantity to adjust
Committed (Ready in Fulfilment Location)	This will show the number of the line item that are in the location that they will deliver from.	This quantity should equal the total quantity of the line to show all are ready to deliver.
Fulfilled	Because you can partially deliver an invoice this column shows how many of an item have already been fulfilled	If the quantity = Fulfilled that line the customer has possession of all of the items on the line.
Invoiced	This is the number of the items on the line that have been finalized, billed/invoiced.	Fully Invoiced Sales Orders can no longer be adjusted.
Price Level	This is the level for the price of the items	This is set by the customer record and should not be adjusted.
Each	The cost of each item	
Amount	The number of an item time the cost of each	

…Items tab continued

	Field Name	What?	Why?
	Estimated Availability	The estimated date that the items will be available in the company.	This will be the date from when a fulfillment can be scheduled not the date they will be in a customer's home.
	Reserve From Another Location and Transfer	This is where the "Reserve" button will show up if there is not enough stock of an item in the Distribution Center. You will click on this button if you are permitted to reserve the items from another showroom.	DO NOT USE THE RESERVE BUTTON IF YOU ARE RESERVING TO YOUR FLOOR FOR CUSTOMER PICK UP. IT will transfer the item to the Distribution Center.
	Reserve From/ Current Item(s) Location	The location the item needs to be at to be fulfilled	This should say Distribution Center unless it is a customer pick up at your store.
	Available In Reserve From Location	This is the stock level of the item available at the location it will fulfill from.	If this quantity is higher than the quantity ordered it is in stock and ready to go.
	Inventory Detail		
	Scheduled Delivery Date	The date the line item is scheduled to be fulfilled	Because a Sales Order can be partially delivered, each line item will have a scheduled delivery date.
	Scheduled Delivery Method	The method the line item will be fulfilled	Because a Sales Order can be partially delivered, each line item will have the fulfillment method
	Scheduled Delivery Record	The record for the line item fulfillment	Because each Sales Order can be partially fulfilled, each line item that has been scheduled for fulfillment will have a Delivery Record.

3. Shipping/Billing/Signatures

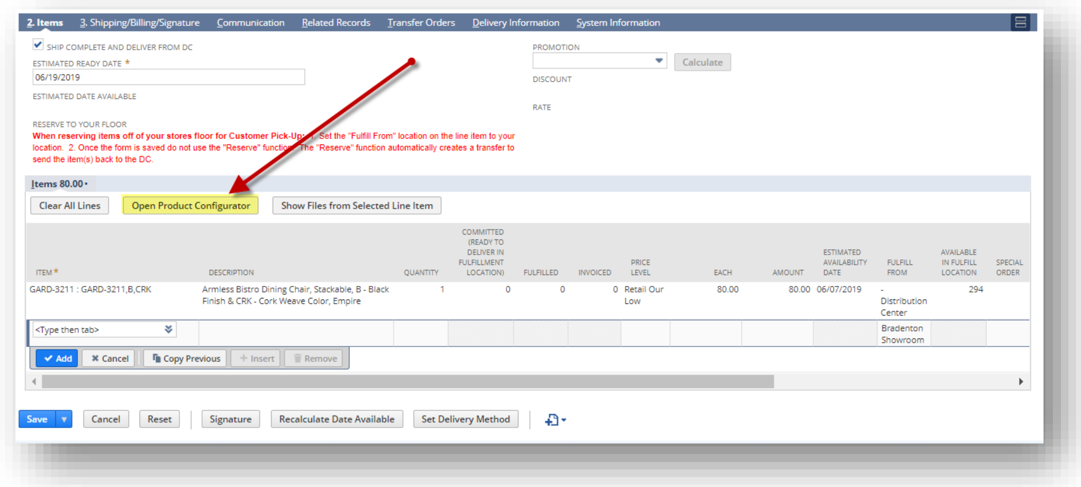
	Field Name	What?	Why?
	Customer Pick Up Instructions	Special Instructions to follow for the Ship To Select if it is a customer pick up	Follow these instructions to ensure the customer will be charged the correct sales tax
	Ship To Select	The location the product will be fulfilled to	
	Delivery Method	The way the transaction will be fulfilled	This is set by the Set Delivery Method at the top or bottom of the screen.
	Shipping Cost	The cost for the fulfillment method	This field will automatically populate. You can override the field based on the Play to Win guidelines.
	Bill To Select	The billing address for the transaction	
	Wells Fargo Approval Code	This is where the Wells Fargo Approval Code will be stored for the transaction	
	Delivery Notes	Specific notes for the delivery of all the items on the transaction.	
	Terms	How the customer will pay their balance	
	Tax	The county the sales order is taxed at	This is controlled by the Ship To Select Address.
	Tax%	The percent of the tax rate for the Sales Order	
	Set Delivery Method	Use this button to set the delivery method	This button will only show up if the sales order is ready to deliver. This function will only allow you to set fulfillment methods available in the Ship to area and automatically set the Shipping Cost.

The Product Configurator

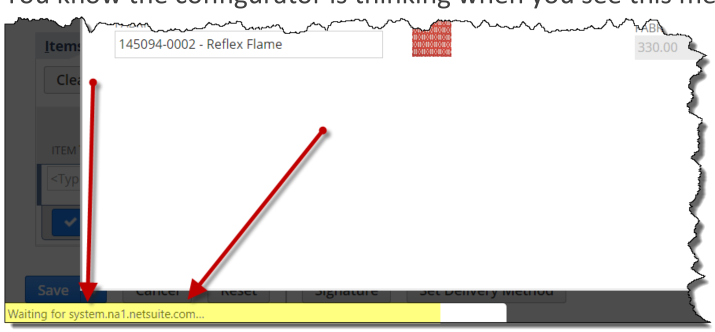
The Product Configurator is a powerful tool and should be used to enter items you are ordering on a Sales Order. It contains 95% of all items we can order. The real magic happens because the configurator will only let you configure options on items that are available. Throughout the configuration process, the configurator creates the correct SKU and correct pricing without the user having to look up or reference any pricelist. Be patient while the Product Configurator sorts through ordering options. The time savings and accuracy create synergies throughout Leaders and increases our customer experience

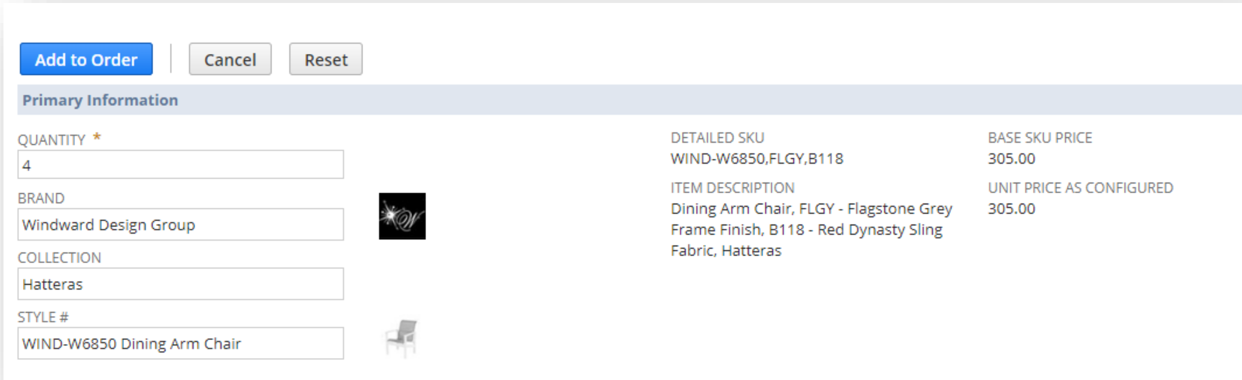
From the “2. Items” tab on a sales order click Open Product Configurator

a. Please note that the Product Configurator must sort a massive amount of data and may have load times of up to 10seconds between choices. Be patient. It is worth the wait to get complex orders right the first time.



You know the configurator is thinking when you see this message in the lower right.

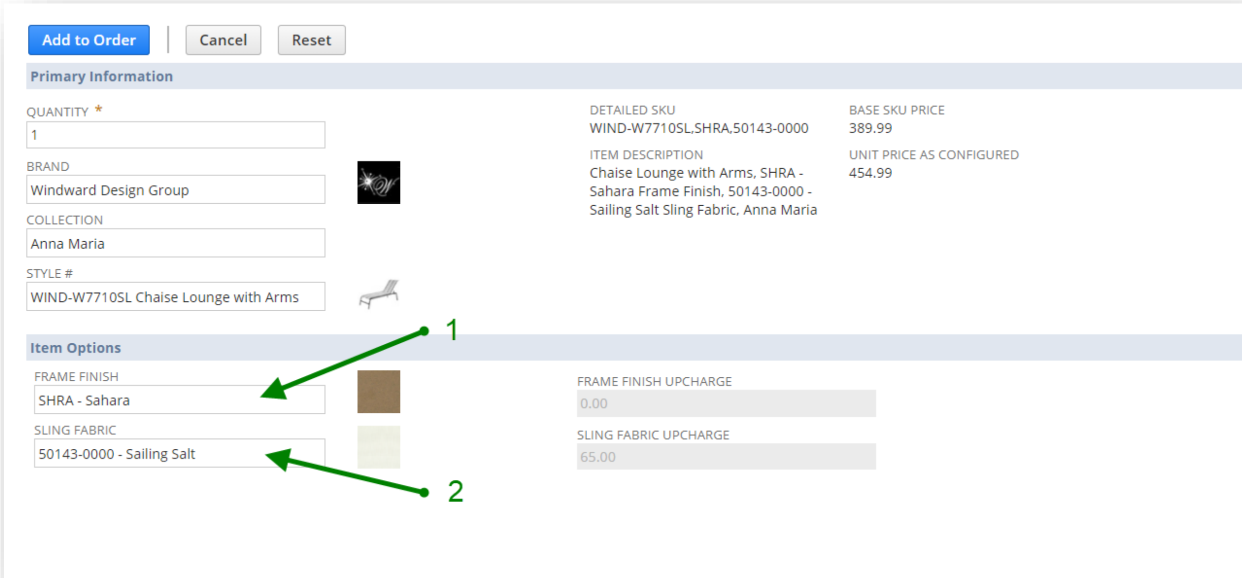




2. Quantity
    a. Enter the quantity of the item
3. Brand
    a. Enter the Brand of the item
        i. Note that you can scroll through the list or you can start typing and NetSuite will show you matches.
4. Collection
    a. Once the Brand is selected the "Collection" field will populate. Choose the collections
        i. If you skip collection and go straight to style it will show all of the styles for the Brand.
        ii. If you select a Collection, the Style window will only show you the styles available in the collection
        iii. Note that you can scroll through the list or you can start typing and NetSuite will show you matches
5. Style
    a. Choose Your Style
        i. Note that you can scroll through the list or you can start typing and NetSuite will show you matches

You will notice that on the right side of the window, the Detailed SKU, Price, and Description begins to build automatically. The configurator will now only show you options that will go with the piece you have selected Organizing and displaying the options can sometimes take up to 10 seconds.

6. Choose your options



7. If images are loaded, they will show to the right of the options you have selected. Double-check the images and the description. If everything is correct, click **Add to Order**

8. To add another item, click **Open Product Configurator** again.

Take a Payment / Deposit

A Sales Order Will Not Reserve or Order Merchandise without a Deposit

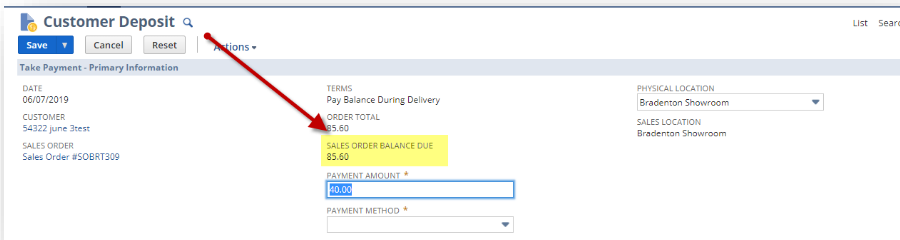
Once the Sales Order is saved it will take you to View Mode of the Sales Order. In View Mode you will be able to review images of the items and options selected to make sure everything is correct.

If you need to make a change on the Sales Order simply Click the Edit button to go back to Edit mode.

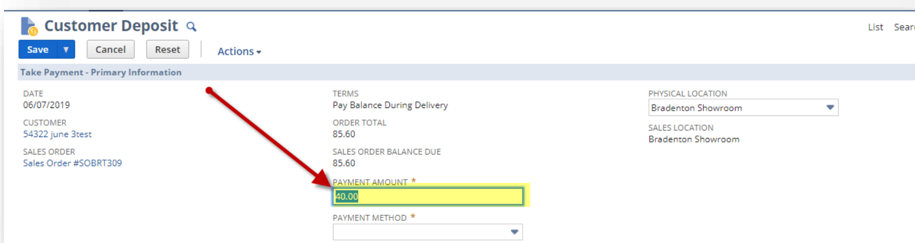
If everything is correct click the Take Payment button.

Credit Card Present

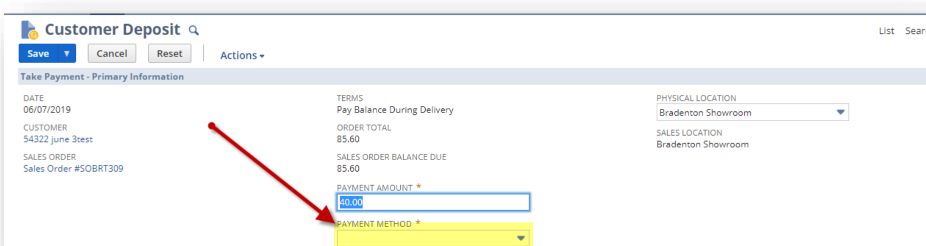
1. The Sales Order balance can be seen directly above the payment field.



2. The minimum deposit will automatically populate.
   a. You can take more money than the minimum standard if the customer wishes to pay in full.
   b. If you take less than the amount populated in the window the event will go on a report sent to the Sales Leadership team.



3. Select the Method of Payment



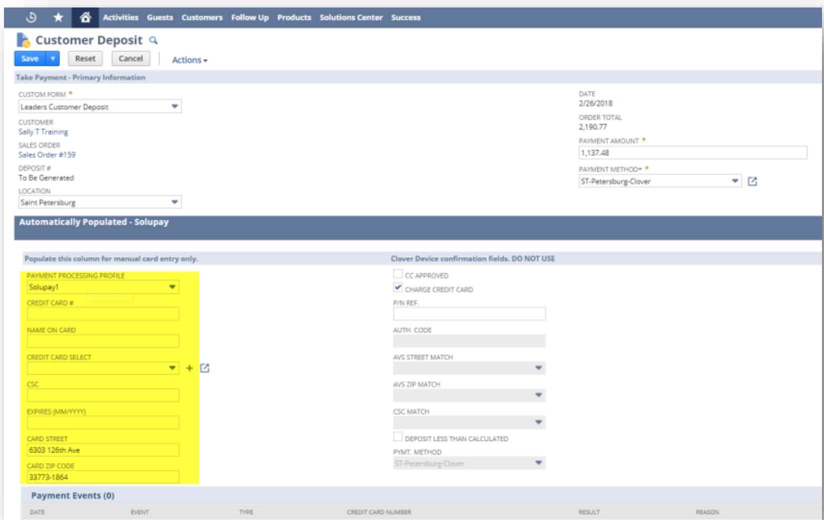
4. Click Save
5. Follow the prompts on the Pax device
6. Please note this will not save the guest's credit card information. If a guest wishes to have a credit card on file they will need to follow the Card Not Present instructions on the next page.

Card Not Present

If the credit card is not present or the guest wishes to put a credit card on file with Leaders, then follow the steps below. A card on file is "tokenized" so that the card information is encrypted and cannot be accessed by anyone. Having a method of payment on file with Leaders follows all Red Flag and PCI compliance rules set forth by the United States Government. Having a card on file with Leaders makes all future orders easier for the guest.

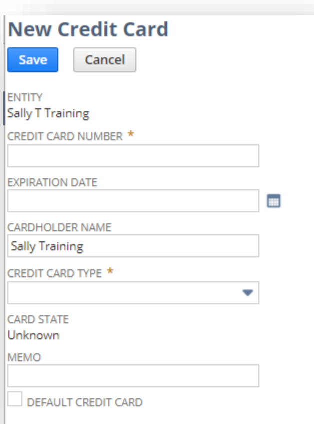
Running a charge and not saving it

1. Fill out the fields in the Manual Entry column and click Save



Saving a credit card on file

1. Click the + button to pop out the new card window and fill out each field.



2. Click Save when complete

3. Finish filling out the fields and click Save to execute the transaction.

A Sales Order Will Not Reserve or Order Merchandise without a Deposit

FAQ

- ✓ How do I know if the product I have ordered is in stock?
  - You can look it up in the Item Look-Up Screen
    - Home Screen / Item Look Up / Inventory Detail Tab
  - The Available in Fulfill Location on the line item has a quantity greater than the quantity you are reserving
- ✓ How do I know if my order is ready to deliver?
  - The order ready to deliver check box in the 1. Primary information section is checked
  - The Schedule Delivery button is visible
  - The order shows up on your Orders Ready To Deliver report.
- ✓ What delivery date is the Sales Order set for?
  - A Sales Order will normally have a single date that the entire order will fulfill. Because Sales Orders can partially fulfill the delivery date is shown on each line item.
- ✓ I noticed I made a mistake after I saved the order. Can I fix it without rewriting the sale?
  - You can edit a Sales Order anytime from the Edit mode. Keep in mind if you add or take away product you will affect the total value of the Invoice and could affect the date the order will be ready to be fulfilled.
- ✓ How do I set the order for fulfillment?
  - Set the way the order will be fulfilled in Edit mode by clicking the Set Delivery Method button and following the prompts
  - Set the date by clicking the Set Delivery Method in view mode and follow the prompts
- ✓ How do I change the fulfillment date?
  - To change a transfer date you must reach out to your sales leadership team. You cannot cancel the transfer record once it is created
  - To change a Delivery date
    - Click on the delivery record in the timeline at the bottom of the Sales Order screen. Click on the delivery record and then choose to reschedule or cancel.