



LEADERS HOLDING CO.™

Est. 1971

Fulfill

Items taken by the customer from the store must be fulfilled from the store. Items can only be fulfilled by a store team member if the items are physically in your location. Your location is set on your team member record. If you cover at another store for a day you will not be able to fulfill items for that location unless your team member record is changed.

Fulfilled invoices will be automatically Billed/Invoiced every 6 hours. A Sales Order must be Billed/Invoiced in order to:

- ✓ Take an additional payment
- ✓ Initiate an exchange, credit or return

Table of Contents

Conditions to be able to delivery update:	1
Where do I look to see....?	2
If all items are in the fulfill from location?	2
If some items are in the fulfill from location?	2
If the Ship Complete check box is checked?	2
Fulfill	3

Conditions to be able to delivery update:

- ✓ Item is in my location
- ✓ All items on the sales order are in the Fulfill from location or some items are in the fulfill location and the Ship Complete box is not checked.

Where do I look to see....?

If all items are in the fulfill from location?

There is a check box that will give you a quick view if all items are in the fulfill from location and the Sales Order is ready to deliver. It is the “Order Ready to Deliver” check box on the “1. Primary Information” section. You will also see the **Fulfill** button and the **Schedule Delivery** at the top of the Sales Order.

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Activities Guests Customers Follow Up Solutions Center Success Products Integration

Sales Order **SOBRT164** 54021 Bruce Test **PENDING FULFILLMENT**

Edit **Back** **Fulfill** **Cancel Order** **Take Payment** **Recalculate Date Available** **Email Receipt to Customer** **Schedule Delivery** **Actions**

1. Primary Information

DATE: 05/01/2019
CUSTOMER: 54021 Bruce Test
ORDER #: SOBRT164

LOCATION: Bradenton Showroom
SALES REP: Tim Newton
☐ SPLIT SALE
SALES REP 2:

CUSTOMER ACCOUNT NOTES:

BALANCE DUE: 45.60
AMOUNT PAID: 40.00
☒ **ORDER READY TO DELIVER**
☒ ELIGIBLE FOR COMMISSION
☐ SPECIAL ORDER ON HOLD

Order Information

CUSTOMER MESSAGE (PRINTS ON SALES ORDER): Thank you for the opportunity to earn your business! Your referral is the highest compliment we can receive.

DELIVERY RECORDS

CREATED FROM OPPORTUNITY
CREATED FROM RETURN AUTHORIZATION (RA)

If some items are in the fulfill from location?

Path: Sales Order / “2. Items” Tab / Each line item

2. Items **3. Shipping/Billing/Signature** **Communication** **Related Records** **Transfer Orders** **Delivery Information** **System Information**

☒ **SHIP COMPLETE** **DELIVER FROM DC**
ESTIMATED READY DATE: 05/01/2019
ESTIMATED DATE AVAILABLE:

PROMOTION
DISCOUNT
RATE

RESERVE TO YOUR FLOOR
When reserving items off of your stores floor for Customer Pick-Up: 1. Set the "Fulfill From" location on the line item to your location. 2. Once the form is saved do not use the "Reserve" function. The "Reserve" function automatically creates a transfer to send the item(s) back to the DC.

Items 80.00

ITEM	DESCRIPTION	BRAND	ITEM	OPTIONS	QUANTITY	COMMITTED TO DELIVER IN FULFILLMENT LOCATIONS	FULFILLED	INVOICED	PRICE LEVEL	EACH	AMOUNT	ESTIMATED AVAILABILITY DATE	RESERVE FROM ANOTHER STORE & CREATE TRANSFER FROM	FULFILL FROM	AVAILABLE IN FULFILL LOCATION	INVENTORY DETAIL	SCHEDULE DELIVERY DATE	SCHED DELIV METH
GARD-3211	Armless Dining Chair, Stackable, B - Black Finish & CRK - Cork Weave Color, Empire				1	1	0	0	Retail Our Low	80.00	80.00	05/01/2019		-	294			
GARD-3211.B.CRK																		

If the Ship Complete check box is checked?

Path: Sales Order / “2. Items” Tab

2. Items **3. Shipping/Billing/Signature** **Communication** **Related Records** **Transfer Orders** **Delivery Information** **System Information**

☒ **SHIP COMPLETE**
ESTIMATED READY DATE: 05/01/2019
ESTIMATED DATE AVAILABLE:

PROMOTION
DISCOUNT
RATE

Fulfill

Path: Sales Order / Fulfill Button on header

When a sale order meets the criteria outlined earlier in this section you will see the **Fulfill** at the top of the Sales Order.

1. Click the **Fulfill** button
2. Take notice if money is owed on the Sales Order
 - a. If money is owed you can go back and take a payment from the Sales Order by clicking the **Take Payment** button.
 - b. If you miss the opportunity to take a payment from the Sales Order you will be able to take a payment on the Invoice once the Sales Order is billed.

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Item Fulfillment To Be Generated

Save Reset Cancel

Primary Information

DATE
06/08/2019

CUSTOMER
54021 Bruce Test

CREATED FROM
Sales Order #SOBRT164

SALES ORDER BALANCE DUE
45.60

Classification

SALES LOCATION
Bradenton Showroom

REF. NO.
To Be Generated

FULLFILL INSTRUCTIONS
A Sales Order can be partially fulfilled. In Edit mode, edit the line items to only show what is being given to the customer right now. You can remove a full line by clicking the corresponding Fulfill check box off or you can edit the quantity of line item by clicking on the quantity and typing in the new value. Save when done to fulfill the items.

3. Read any **Red** instructions on the form.
4. Review the items you are going to fulfill. Remove any item the customer is not physically taking with them.
5. Click **Save** to complete the fulfillment

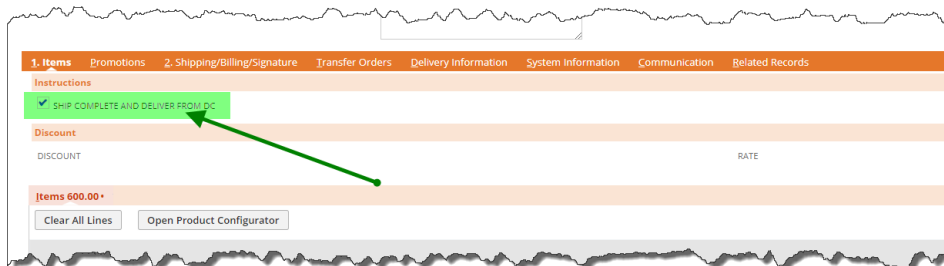
Partially Fulfill

It may be necessary to only deliver part of a Sales Order. Remember that it costs \$100 or more every time we go to a customers home. Please have the guest pick up at the store if you are going to partially fulfill.

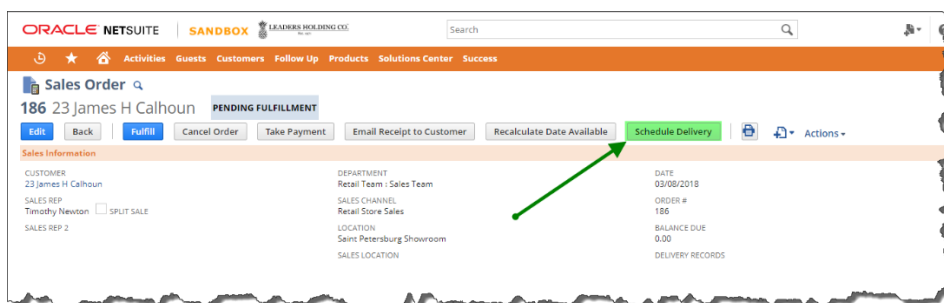
1. Look the Sales Order up using “Guest Lookup” on the NetSuite home screen



2. Once the Sales Order has been located open it in Edit mode.
3. On the “Items” subtab uncheck the ship complete button



4. **Save** the Sales Order
5. If there is a deposit on the invoice and items are in the organization and available to be fulfilled the **Schedule Delivery** button and **Fulfill** will appear on the Sales Order in View mode.



6. If the items are in your location and the customer is taking them you can use the **Fulfill** to Fulfill them from the store. If you need to schedule a delivery follow the prompts in the **Schedule Delivery** windows. For more detailed information see the Schedule Change Cancel Fulfilment Procedure in the Procedure Manual