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:

- ✓ 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.

If some items are in the fulfill from location?

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

If the Ship Complete check box is checked?

Path: Sales Order / "2. Items" Tab

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.

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
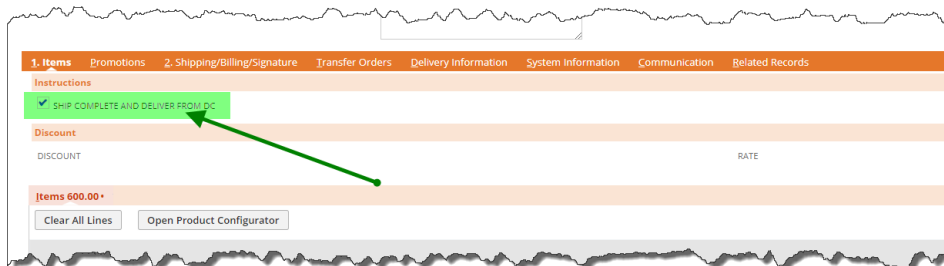
4. **Save** the Sales Order

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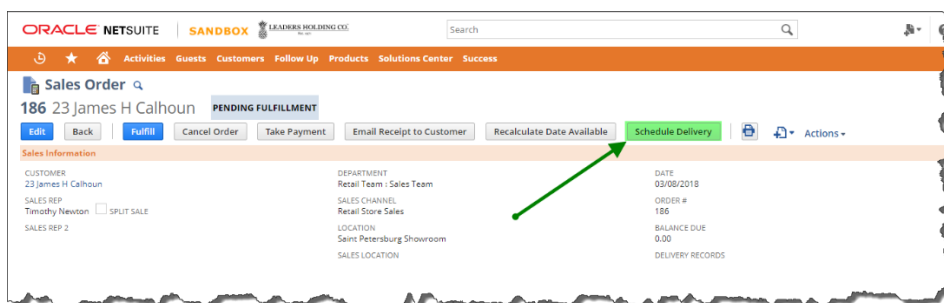
6. If the items are in your location and the customer is taking them you can use the **Fulfill** to Fulfill them from the store. If you need to schedule a delivery follow the prompts in the **Schedule Delivery** windows. For more detailed information see the Schedule Change Cancel Fulfilment Procedure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