



**LEADERS HOLDING CO.<sup>TM</sup>**

Est. 1971

## **Writing a Manual Sale on Paper, taking a Deposit & Entering it in NetSuite**

While you are getting used to NetSuite or before we are fully on tablets in the retail stores you may feel more comfortable writing your sales on a manual invoice. If you do follow these steps to take a deposit.

1. Create an amazing space for the guest.
2. When the guest needs a quick moment gather their:
  - a. Name
  - b. Phone number
  - c. Email
    - i. To send receipt & Ownership packets
  - d. Shipping and billing address
3. Create their customer record in NetSuite
4. Open a Sales Order for the guest and put any item you would like on the Sales Order
5. Save the sales order
6. You will be able to take a deposit against this sales order in any amount you need
7. You can print a receipt from the credit card device or from the Take a Payment form
8. You can go back and edit the line items on the sales order to match your written copy when time permits.