



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

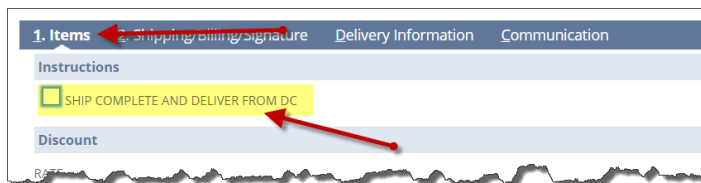
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## Schedule, Change, or Cancel Fulfillment

Fulfillment is the term used to deliver an order. This can be done by a Leaders delivery truck, customer pick up, or freight carrier. NetSuite is programmed to only show you the valid choices for your customers address.

Orders can only be scheduled for fulfillment when they have a deposit and all items are in possession of Leaders at the distribution center or a store location.

**Note:** Sales Orders can be partially fulfilled if the Ship Complete box is unchecked. Ship Complete is found on the Sales Order on the "1. Items tab."



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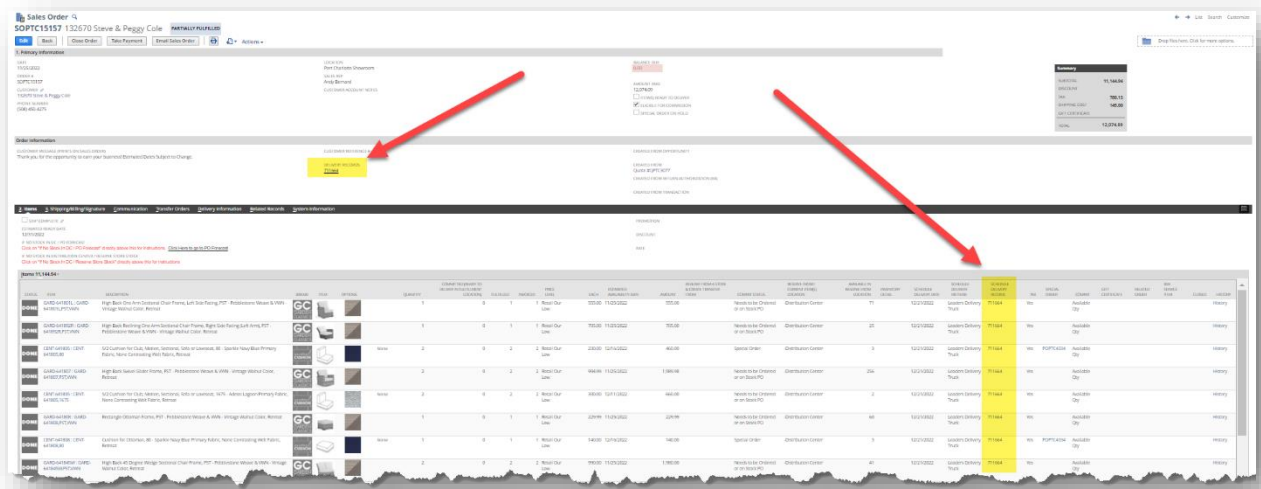
## Schedule a Delivery

**Path:** From the Sales Order – Set Delivery Method – Follow Prompts

### Conditions

Ship Complete	Conditions
Is Checked <input checked="" type="checkbox"/>	<ul style="list-style-type: none"> <li>✓ Must have a deposit</li> <li>✓ All items must be in the organization</li> </ul>
Is Not Checked <input type="checkbox"/>	<ul style="list-style-type: none"> <li>✓ Must have a deposit</li> <li>✓ Items in the organization will be able to be scheduled. Items not in the organization will not be able to be scheduled. This will partially fulfill the sales order leaving the other items to be fulfilled when they arrive.</li> </ul>

- Find the Sales Order you would like to schedule. Open it in View Mode
  - If you open the Sales Order in Edit mode you will have to click **Save** to get to View mode
- Click the **Schedule Delivery** button
  - If you need to change your delivery method go to the Sales Order in Edit mode, click the **Set Delivery Method** and follow the prompt
- Select the Shipping Method and follow the steps.
  - Review the order to make sure it is correct then click **Next >**
  - Add any delivery notes then click **Next >**
  - Click on the white space for the date you want to select.
    - Acknowledge the date you selected then click **Next >**
  - Confirm the email that the delivery confirmation will be sent to
  - Click **Finish**
- The Delivery Record field and the Delivery Record on the line item will update with the Delivery Record number.



## Cancel or Reschedule Fulfillment

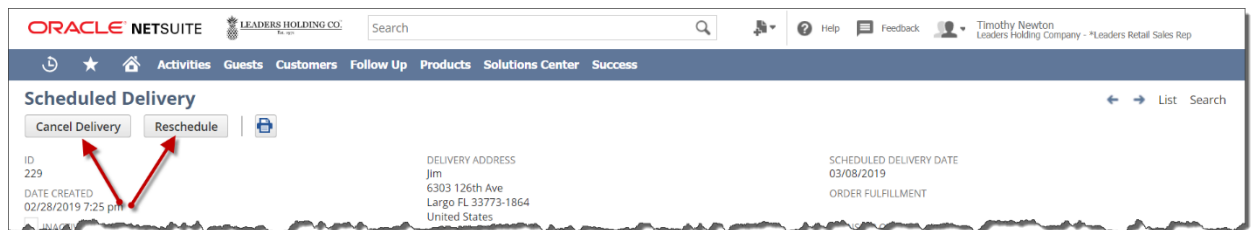
### Can be changed or canceled if:

- ✓ No items are on a transfer
- ✓ It is more than 48 hours before fulfillment

### Cannot be changed or canceled if

- ✓ Items are on a transfer from a store to the distribution center. You must allow the transfer to complete or ask the Distribution Center office to cancel the transfer before changing or canceling fulfillment.
- ✓ Within 48 hours of fulfillment

1. Look up the Sales Order you would like to change or cancel fulfillment on
2. Find the Delivery Record on the line item or in the Delivery Record Field.
3. Choose to  or



4. Follow the prompts