# TROUBLESHOOTER: CASH SALE OF KITS

## Introduction

A conflict exist between kit functionality which requires all components to be shipped before invoicing and Cash Sale functionality which will not allow a packing slip to be produced and requires a sales order to be invoiced with the cash payment recorded.

This process is a temporary workaround whilst changes are made to overcome this conflict.

# Cash sale work around for sale of Kits

You need to get Shared Services to set up a temporary Credit limit on the Cash Sale Account so that you can do the following and then when you have finished the Sales order you need to get them to remove the credit limit

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## 

## STEPS

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| --- | --- |
| CASH SALE FOR SALE OF KITS | |
| *Request Share Services to set up a temporary Credit Limit on the Cash Sale Account* | |
|  | Click Area Page node: Sales and marketing -> Common -> Sales orders -> All sales orders. |
|  | Double-click or press Enter on the selected record in form Sales orders.  C:\Users\wendyb\AppData\Local\Temp\SNAGHTML61d588.PNG |
|  | Open up the Sales order form. – highlight each line and then go to Inventory drop down box – Transactions  C:\Users\wendyb\AppData\Local\Temp\SNAGHTML5f8660.PNG |

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|  | You need to make sure that the status of each item line is Reserved Physical, if not then contact the help desk.  C:\Users\wendyb\AppData\Local\Temp\SNAGHTML6558fa.PNG |
|  | Click the Close toolbar button. |
|  | Close the Inventory transactions form. |
|  | Click the Pick and pack -> WMS -> Picking journal button. |
|  | Switch to the Picking journal lines tab on the Picking journal form.  C:\Users\wendyb\AppData\Local\Temp\SNAGHTML6a430a.PNG |
|  | Click the Pick button. |

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|  | Click the Pick all button  C:\Users\wendyb\AppData\Local\Temp\SNAGHTML6dc9e5.PNG |
|  | Click the Apply button. |
|  | Click the Close toolbar button. |
|  | Close the Pick form. |
|  | Click the Picking journal -> Status -> Picked button. |
|  | Click Ok in the Change of status form.  Update to status Picked?  Do you want to print packing slip? NO |
|  | Click the Close toolbar button. |
|  | Close the Picking journal form. |
|  | Invoice this out as per normal for a Cash Sale |