Sales Order Processing

To process an order from the Capture Queue

Open up Document Journal (View) on Nav

Sales orders to be processed are imported to 'Documents to Register' in Capture Queue.

Highlight 'SALES' line and click on 'Edit Journal'.

A list of orders will show. These can be edited to show the correct account, to assign to priority queues if rec

If someone's name is assigned in the User ID field then that order is already owned and being processed by

Click on order to be processed and click 'Take Ownership'. Your name will be then assigned against that ord

Click on 'Document Card'. Some of the order information will display with copy of the pdf order. If the order i

Click on 'Incoming email' icon and the email attached to the order should open. Pull over to your other scree

**Make sure the 'Customer' is correct before you go any further. Some customers have more than one acco

Fields should be auto-populated with data from the pdf. If there are no fields shown, click on 'Recognise Fiel

Check fields are properly completed, remapping any which require change. To map; right click on order to hi
Check the order confirmation field has the email of the person who sent in the order.
If there is no apparent email address you can send the confirmation to click on Customer Card icon at the to

Manually input any missing information into the required fields on Document Card from the email. If there are
The customer's order may be attached to the email or it may just be the email itself.

In the lines field do not populate the ‘Translate to Type’ field manually. The customer’s item code is input un

Once all fields have been properly filled in with the available information click ‘Register’ and the information w
If a warning comes up ‘Document is not ready to register’, scroll down to the bottom and it will usually tell you

Once registered the information will all put over onto a new Sales Order.

In GENERAL Tab
CHECK ACCOUNT/ADDRESS CORRECT – this is invoice address NOT delivery address. Some customer

Order Confirmation Email – ensure the correct email address/addresses have been selected and the email is

Expected Delivery Date – 3 days standard delivery (don’t include weekends or Bank Holidays)

If placing order before 12 noon – the order will be shipped that day so expected delivery date will be 3 workin
e.g. order processed Monday 11th April @ 10.00am, expected delivery date will be Thursday 14th April.
If placing order after 12 noon – goods will be shipped the following day and delivered 3 working days after or
e.g. order processed Monday 11th April @ 2.00pm, expected delivery date   will be Friday 15th April.

Exceptions to this are:
When the customer has requested a particular delivery date. If customer wants delivery before our standard
For parcels going with Parcel Carriers (Fedex/DHL/Parcel Hub etc) delivery will be next day if shipped out be
For items going out second class postage, delivery will be the day after next if shipped out before 12 noon, o

Ensure there is an entry in External Doc No field. If no official PO number supplied, use Customer name/me
As a general rule, there shouldn’t be spaces in the document number field. Keeping this consistent reduces t
No order should be released until the External Document No field is populated.

(If the External Document No field is blank it is not possible to send an invoice or despatch from the system)

If a warning flashes up that the External Document No. has been used before, check the account in case the

No need to fill in ‘Shipping Cost’ unless the goods are being despatched with a Parcel Carrier or Bulk Tipper

‘Total Gross Weight’ will populate automatically once the product and quantity are added.

‘Query Handler’ – this will be populated by the person who is dealing with any query relating to the order sho

In SHIPPING Tab

Check location code is correct

If unsure check ‘Item Availability’ on RHS of Sales Order against locations.

For bulk loads – see excel spreadsheet P:/Haulage Rates/Haulage Inclusive.

If product being shipped direct from manufacturer type in DIRECT in Location Code and BUY in Shipping Ag

If delivery address has pulled through, make sure it is correct – otherwise:

Click CODE – drop down arrow

Select address from the list (make sure it matches correctly)

If it’s a new delivery address:

Click CODE – drop down arrow

Click ‘Advanced’

Click ‘NEW’

Complete new name and address details and any delivery information. Info re forklift or tail lift & pallet truck r

OK

Ensure new address has pulled through to Sales Order.

Enter Contact name and Phone No. fields where we have this information. For book ins and half or full loads

Enter no of pallets/loads/packages required

No of pallets required:

- <250kgs = 0.25

>250 – <500kgs = 0.5

>500 – 1225kgs = 1

For bulk loads use the number of loads

e.g 60T = 2 x 30T loads (or 3 x 20T if a rigid vehicle is required)

For small packages going by parcel carrier enter the number of individual packages.

If unsure, refer to how-to guide P:\Customer Service\How to guides\2. How to process an order (Continia & N

Add in all additional information required for delivery (ensure book in; am/pm delivery/overnight delivery boxe

Make sure either ‘Forklift Available Onsite’ box or ‘Tail Lift Reqd’ box are ticked (update shipping card with re

Add in any additional information for haulier and warehouse staff. (The warehouse do not see the “internal n

Shipping Agent code:

To select haulier for pallets (groupage):

Click on Haulier Costs at top margin

They are automatically sorted by price

Select cheapest one from depot required

Check haulier is suitable and has space to take order (using the Groupage Summary Jet spreadsheet in P:\T

Click check box to select haulier

Cost will populate in Shipping Cost field in GENERAL tab.

To select haulier for half or full loads:

The Haulage Manager will organise these so put on RATE for winter products or NWRATE for non-winter pr

To select haulier for bulk loads:

For de-icing salt all deliveries in England/Wales will be by Bulmans (BLM), and RATE for Scotland.

Product ex Ineos (DIRECT) or Compass Minerals (BSCOWIN) will be put on BUY

All other bulk products put on RATE/NWRATE

To select parcel carrier:

Check Excel spreadsheet P:\Transport\Groupage & Parcel Carriers\Parcel rates Calculator V6
Enter the number of parcels (not items), total weight and delivery postcode and select cheapest option.

To send by post:
Check current franked postal rates (see Janice or check chart on wall at reception)
Use codes FIRST for 1st Class & SECOND for 2nd Class

For Salthouse or Blackthorn orders that are being delivered locally:
Use codes SHDEL / GRADDEL
E-mail SHWarehouse@peacocksalt.co.uk to let them know order is ready to be delivered. Click "Talon Ager

If Customer is arranging collection of goods:
Make sure the depot where the goods are being uplifted is selected in the 'Shipping Address' field
Shipping Agent = UPL (for Blackthorn orders use GRADUPL; for Salthouse orders use SHUPL)
No delivery line is required.

If order not ready to be shipped use other appropriate code:
NWRATE/RATE - If order not to be shipped yet, or unsure what haulier to use and full or half loads.
NWQUERY/QUERY - enter query details in order comments tab at top of page. Select your user name in the
NWPRICE/PRICE – if no active pricing on NAV/CRM, enter query details in order comments tab at top of pa
CREDITSTOP – If payment overdue or exceeding credit limit.
BUY – if goods are coming direct from manufacturer.
PROFORMA – If customer has requested a proforma invoice. See guide re how to send these.
STOCKOUT – if goods are out of stock. Make sure stockout box is ticked on lines and stockout date field fill
HOLD – hold for customer call-off
ALLOCATE - for goods to be allocated.

Click on Customer Details – Actions on RHS
Click on Comments and check if there is anything relevant that needs to be added to order details.

In INVOICE DETAILS Tab

Check Customer Payment Terms is filled and correct: if VSA or PP Terms Code then goods are not to be sh

In LINES Tab

The product lines should already be autopopulated. Ensure they are correct and populate any missing fields

Click under TYPE and enter “Item”

Click under No. and enter our Product Code

If unsure what is usually ordered click on Posted Sales Invoices on RHS. This gives list of everything this pa

Click under Quantity and enter no of bags/items etc.

CHECK PRICES match order. If prices are different then check prices on CRM. If our price is lower then go

The correct price should automatically populate but check under the customer account on CRM.

CRM prices should also push through to Nav: click on product line and then Sales   Prices on RHS

Some customers belong to price groups, which take priority. Within the “Invoice Details” tab, the “Customer I

Or..

Click Customer No on RHS of screen

Then Prices in HOME Tab at top of page

If Customer has no price for the required product on CRM, put on PRICE/NWPRICE for Account Managers’

If warning flashes up there is not enough stock, make sure the stockout box is ticked and the stock out date

Add delivery line:

A delivery line will be added automatically when you complete the order by clicking “Create delivery PO”. Ho

If the amount of bags is less than ½ a pallet remember to add a pallet (WP) to the lines section. (add this lin

If individual bags then they will be sent in boxbags. Add BOXBAG to lines above delivery line

If customer paying for express, timed delivery or am/pm delivery, add cost to customer in delivery line.

For 1T bags: if going through the pallet network then these will need to be on pallets. Add WP above deliver

There’s a function to auto-add any additional items such as pallets, boxbags, etc. In the ribbon of the “Lines”

No delivery line required if customer is arranging uplift.

TO COMPLETE ORDER

Click ‘Create Delivery PO’

This will automatically generate a delivery line, raise and attach a PO for the haulage, send the order to the I

Check ‘Printed’ box and ‘Confirmation Printed’ box are ticked on the order, except for parcel carrier deliverie

The customers order will attach to the Sales Order.

For orders that are being collected by customer:
Archive Document
Manually select ‘Email Order Confirmation’ icon on top bar (one with orange belt) and make sure the order c
Click ‘TalonLocationDoc’ which will send the order to the depot to release once the customer comes in to co
For collection from AYR print out the order so it can be kept in the tray in the office until the customer comes
Click ‘Release’ on top bar to finish the order.

IF ORDER NOT READY TO BE SHIPPED

If order is not ready to be shipped, please remember to click ‘Archive Document’ before clicking OK out of th

If order not to be despatched until a future date put on RATE or NWRATE (Non-winter) and the transport tea
If order showing Customer has an overdue balance, click on ‘Available Credit’ on RHS

Then click on Overdue Amounts

Look at due dates in red.

■

If invoices are 2 months or older the order goes on CREDITSTOP

If the Customer’s credit limit has been exceeded the order goes on CREDITSTOP■

If there is any discrepancies or queries regarding the order it must be put on QUERY/NWQUERY with a note

If there is no price for any item on the order it must be placed on PRICE/NWPRICE after checking the accou

If a warning flashes up that there is not enough stock available, the order must be placed on STOCKOUT (m

To process an order that is not in the Capture Queue

In Nav, open up the Sales Order list page.

Click on ‘New’ icon in top header (usually under HOME tab). A blank order will appear and once completed

Fill in the order information as described above, starting at ‘In the General Tab’.

To process orders for ROI, NI or other countries outside the UK

These orders usually incur an extra delivery charge payable by the customer. Process the order as normal l

Customs Declarations now require to be done for every country outside the UK, including Northern Ireland.

This may apply even if the delivery is going to within the UK but for onward delivery elsewhere.

To process a Free of Charge order

Refer to the ‘How to process FREE OF CHARGE SHIPMENTS’ file. P:\Customer Service\How to guides\2. H

Signed……………………………………………………………………. ■■■Date……………………………………