19 Essential Steps to a Successfully Processed Order

General Tab

Correct account & invoice address
Check credit limit
Total gross weight does not exceed the maximum for vehicle/pallet
Order confirmation e-mail is populated correctly (unless it's an Arco order)
Populate Expected delivery date
Ensure External Document No. is populated exactly as it appears on the PO, removing any spaces
Populate shipping cost – use relevant report; parcel rates calculator, haulier costs or haulage inclusive.

Shipping Tab

Correct depot - use product info sheet or haulage inclusive report
Correct delivery address
Populate shipping agent code (see below for hold status's)
No. of pallets/packages populated
Tick relevant boxes i.e. TL req/Fork available/overnight delivery/am charge/book in req etc.
Any additional Comments/requirements
Contact name & number if provided
NOTE: anything 10+ pallets or bulk MUST have contact name & number with book in request.

Lines Tab

Correct product/quantity/price (check CRM, price groups or standard list price)
Item availability – if "Available Inventory" on the right-hand side shows a minus make sure stockout box is tic
If required add relevant pallet or box codes
Check Total excluding VAT matches customers order exactly.

Invoice Details Tab

Check payment terms on the order, if customer wishes to pay by card on an account set up for invoicing, pay
Extra Notes
Always save any e-mails in drop box and update comments if needed.
If UPL/GRADUPL/SHUPL, manually release the order, order confirmation to the customer, e-mail shipping n
HOLD STATUS OPTIONS
NWRATE/RATE - If order not to be shipped yet, or unsure what haulier to use and full or half loads. – PICKE
NWQUERY/QUERY/HTQUERY/SATQUERY - enter query details in order comments tab at top of page. Sel
NWPRICE/PRICE/HTPRICE/SATPRICE– if no active pricing on NAV/CRM, enter query details in order com

CREDITSTOP – If payment overdue or exceeding credit limit. – PICKED UP BY ACCOUNTS

BUY – if goods are coming direct from manufacturer. – PICKED UP BY STOCK TEAM

PROFORMA – If customer has requested a proforma invoice. – ACTIONED BY OP’S, FOLLOWED UP BY

STOCKOUT – if goods are out of stock. Make sure stockout box is ticked on lines and stockout date field fil

HOLD – hold for customer call-off, update to HOLD location.

ALLOCATE - for goods to be allocated. – PICKED UP BY STOCK & SALES TEAMS

If you’re not clicking “create delivery PO”, ARCHIVE your order.

If more info needed use P:\Customer Service\How to guides