

Sales Order Checklist

SIMPLE CHECK LIST TO ENSURE AN ERROR FREE SALES ORDER

Before pressing "SAVE" on a sales order, check the following at least once with your customer's written order confirmation open on one screen and Netsuite open on the other.

Items Tab

- ITEM CODE, MEMORY CAPACITY & COLOUR – ensure this matches the VP
- QUANTITY
- UNIT PRICE - are you using the correct CURRENCY?
- TAX CODE - did you validate customer's VAT NUMBER for an EU sale?
- VP - always check that it matches the VP confirmed by customer
- PO # and FILE - enter customer's PO reference and upload PO file into 'Purchase Orders' folder in Netsuite.

Address Tab

- BILLING & SHIPPING ADDRESS - customer must confirm both in writing for every order

Shipping Tab

- SHIPPING CHARGE & TAX CODE

Job Details Tab

- JOB NOTES - should be empty for the majority of sales orders. If required, they must be simple & concise:
e.g. *50 x PR123456; format as local disk; plain cover.*

The Deadline

- Remember to enter the correct DEADLINE (lead times vary depending on model)

Double checking against the PDF quote

- Check the proof image in the quote PDF against the image in the Netsuite proof as there may be multiple versions with the same proof number
- Check the total price in NS against the total price in the PDF generated by the quote tool