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. Make sure this agrees with 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 it matches the VP confirmed by customer.
    - PO # and FILE. Enter customers PO reference and upload PO file into folder 'Purchase Orders' in Netsuite.
- ✓ **ADDRESS tab**
    - BILLING & SHIPPING ADDRESS. Customer must confirm both in writing every time.
- ✓ **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 concise & simple. e.g. 50 x PR123456; format as local disk; plain cover.

Finally, remember to enter the correct **DEADLINE** (lead times vary depending on model)

Version 3

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