

SIMPLE CHECK LIST TO **ENSURE AN ERROR FREE SALES ORDER**

Sales orders can be placed in NetSuite via 'load a quote' feature or manually.

To proceed please ensure customer received a proper order confirmation that complies with Flashbay standards.

- ✓ **DEADLINE** (lead times vary depending on model)
- ✓ **CUSTOMER CONTACT** Please specify billing email address to ensure the invoice for advance payment is automatically sent to the correct contact person.
- ✓ **PO NUMBER** and **FILE** (if applicable). Enter customers PO reference and upload PO file into folder 'Purchase Orders' in Netsuite.

ITEMS Tab

- ✓ **ITEM CODE, CAPACITY & COLOUR.** Make sure this agrees with VP. (any accessories, services)
- ✓ **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.

ADDRESS Tab

- ✓ **BILLING & SHIPPING ADDRESS.** Customer must confirm both in writing for every order.

SHIPPING Tab

- ✓ **SHIPPING CHARGE & TAX CODE**

SUMMARY Tab

- ✓ **SUBTOTAL, TAX, SHIPPING & TOTAL**

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.

Before pressing **SAVE** on a Sales Order, **double check** the above information with the final quote approved by the Customer on one screen and NetSuite on the other.

Tips to avoid Sales mistakes:

SERVICES, ACCESSORIES

1. For an existing customer's re-order, you must **always** check their previous order in NetSuite for services, accessories, shipping address and job notes **before quoting**.
2. If the customer is adding DP or DPUS, remember to explain how it works even if it's a repeat customer (please supply screenshot to customer).
3. For customers that ordered printed accessories, have you charged Print Plate (PL)?
4. Individual engraving: please make sure you obtain the file with all the individual names listed (please do a spot check for duplicates). Please remember we can only engrave in 4 font types.
5. Have you explained how the product and accessories will be packed on arrival?
6. Make sure that all items on the Sales order are placed according to line item convention (more info on wiki: Netsuite Scheduling a Sales Order).

ITEM TAB

7. Please pay attention to the interface chosen as it's easy to mix up USB 2.0 and USB 3.0, also OTG USB type (e.g. LYB and LYC).
8. If VP contains customer's contact details (website, address, phone number) please cross check with their signature or website.
9. Proofread the artwork supplied by customer and the VP approved by customer before placing the order.