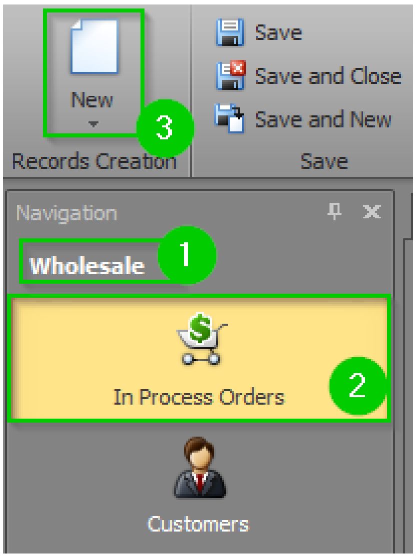
Create a Wholesale Order

Last Modified on 02/10/2020 11:33 am MST

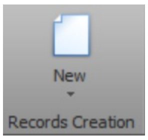
KLĒR allows multiple team members to interact with a single wholesale sales order. The steps for completing a wholesale order may include creating a new sales order, processing a customer payment, assembling an order for pickup or delivery, verifying order completion, and many others! This article will walk you through the steps for creating a new wholesale order.

To create a wholesale order, follow the steps below:

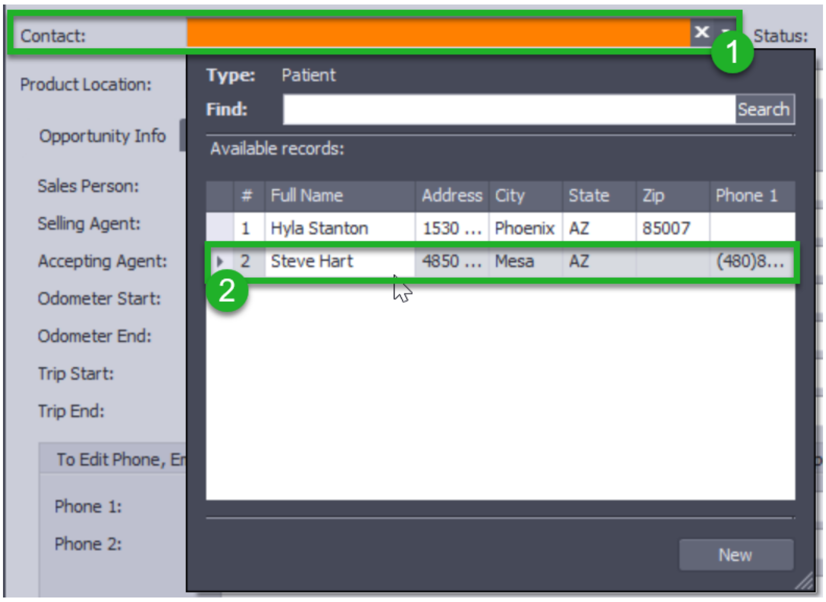
- Step 1 - Within the **Wholesale** Module, select the **In Process Orders** section.



- Step 2 - Click the **New** button in the top navigation menu.

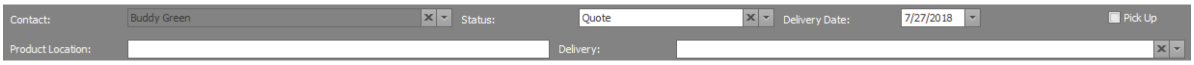


- Step 3 - Click on the **Contact** field drop-down to select the Customer's name. If creating a wholesale order for a new Customer, you must first click the **New** button at the bottom of the pop-up screen and create a new Customer record before you can select it.



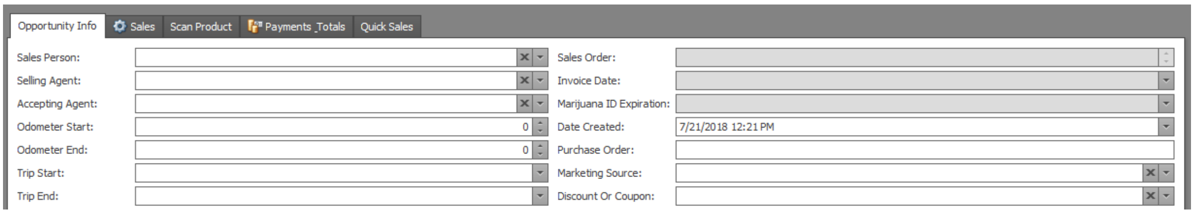
Once you select your Customer, make sure the**Status** field is set to "Quote" or to your specific needs.

- Step 4 - Add data to the following fields, if known:



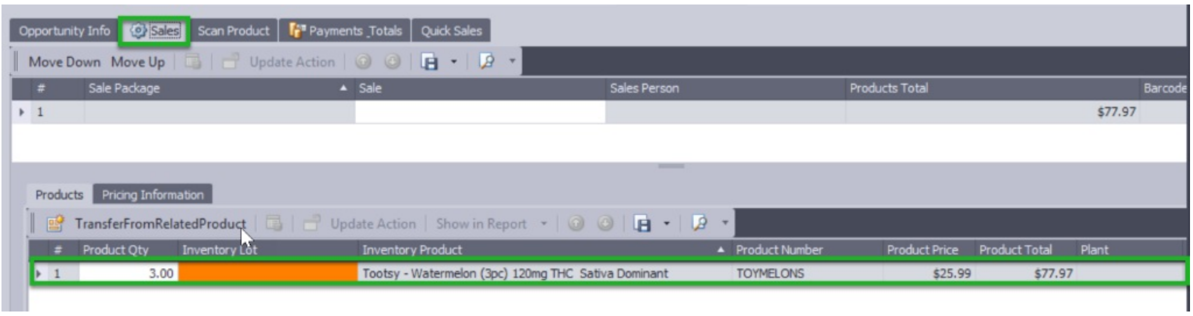
  - **Delivery Date** - The date the products are to be delivered to the customer.
  - **Pick Up** - Check this box if the customer will be picking up their order.
  - **Product Location** - Add useful information to delivery staff about where to find the product they'll need to deliver.
  - **Delivery** - If the wholesale order is link to a specific delivery, choose or create the delivery in the Delivery field.

- Step 5 - Add data to the following fields in the Opportunity Info tab, if known:

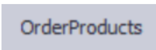


- **Sales Person** - Choose the employee responsible for creating the wholesale order with the customer.
- **Sales Order** - This will be automatically assigned to the wholesale order once you have saved.
- **Selling Agent** - Choose the employee responsible for distributing (physically giving) the product to the customer.
- **Invoice Date** - Once the order has been set to "Invoice", an invoice date will be auto-assigned.
- **Accepting Agent** - Choose from the list of agents who will be accepting the order. If the agent is new, add them as a new customer.
- **Marijuana ID Expiration** - If an accepting agent is set, their Agent ID will automatically show. Make sure to check that it is current.
- **Odometer Star and Odometer End** - If the order is being delivered, you can track the car mileage in these fields.
- **Data Created** - This date will automatically fill when the wholesale order is created, but can be changed.
- **Purchase Order** - If the customer has a purchase order number, use this field as a record.
- T**rip Start and Trip End** - If the order is being delivered, a start and end date of the trip can be recorded.
- **Marketing Source** - If you would like to record how customers hear about your, you can keep track with this drop down menu by choosing or adding a new Marketing Source.
- **Discount or Coupon** - If the customer has a discount or coupon for the order, select it from the drop-down menu.

- Step 6 - From the **Sales** sub-tab, you will select the products to be added to the wholesale order and enter the quantities. To do this, adjust the value in the **Product Qty** field for the desired products to match the desired quantities. You can also use the **Scan Products** tab if you have a scanner available.

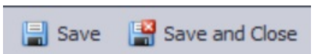


- Step 7 -Continue adding additional Inventory Products until you have all of your desired Inventory Products and Product Qtys added.
- Step 8 - Click the **OrderProducts** button in the top navigation bar.



This will change your order status to" Assemble Order".

- Step 9 - Click the **Save** or **Save and Close** button in the ribbon.



You've created a brand-new sales order! You're now ready toadd payments and assemble the order!