

# Module 5: Completing Purchase Orders

Modern Selling How-To Guides

# Intro

This Guide begins having created a live Quote, directly following on from Module 4: Using the Quote Tool.

Note that for webstore customers that do not have Quote Tool switched on – who are picking up a Pending Sales Order, this is where the journey starts.

Please ensure that your Approval Process is set correctly, as covered in the Settings & Configuration Guide.

Finally, this Guide demonstrates the Manual process for placing Orders While Stock In The Channel offers EDI Automatic Ordering with over 20 of the largest IT distributors, setting this up is explained in Module 7: Connecting External Systems.



#### **SINCH How-To Guides**

Module 1: Getting Started with SINCH

Module 2: Creating Accounts & Contacts

Module 3: Working with Customer Groups

Module 4: Using the Quote Tool

Module 5: Completing Purchase Orders

Module 6: Working With Magento Modules

Settings & Configurations Guide



Module 5: Completing Purchase Orders

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If you have been following the steps from Module 4: Using the Quote Tool, please skip ahead to Step 2.

For webstore customers that do not have Quote Tool switched on who are looking pick up a Pending Sales Order, first log in to your Stock In The Channel account.

In the top left corner, click My Toolset and navigate to your Sales Orders Inbox.



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The Sales Order Inbox is a key area for managing all Pending, Processing and Completed **Sales Orders**.

Use the Advanced filtering at the top of the page to change your view.

Example: Select Pending Status to see all outstanding Sales Orders that need approval, or search by Account.

In this Guide we will go through the steps to complete an individual Sales Order.

- It is also possible to Consolidate multiple Sales Orders into one PO if they are for one customer.
- Find the Pending Sales Order you would like to work on.









This is the final opportunity to make changes before **approving and processing** the Sales Order.

Order details should be automaticallypopulated – please ensure these are all correct.

SINCH automatically works out the most cost-effective way to fulfill the order.

Anyone with the correct user permissions(i.e. the fulfilment team) can

 edit and change the Distributor, or change the Cost Price to a Custom Value.



#### **Extra: Approval Process Permissions**



If you have the Approval Process turned on in your settings, the Sales Order must be approved by someone with the correct User Permissions.

User Permissions are covered in detail in the Settings & Configurations Guide.

Custom approvals can be set by a wide range of parameters such as Account or Monetary Value.

Whoever Approves the Sales Order to Process will be noted in the History log.

Once the APPROVE button is clicked it will now read: PROCESS.





After clicking PROCESS, you'll see a summary of the Order before you commit.

If there are multiple items to be fulfilled by multiple distributors these will be shown as separate Purchase Orders.

You'll see whether the Purchase Order is

- Manual or if you have the Automatic EDI Ordering turned on for that supplier.
- There is also the final chance to Ship To Base (your address, rather than your customer) which is covered in the Settings & Configurations Guide.
- Click COMMIT to confirm the PO.







- You can now see the status of of the Order.
  - NB. If EDI Ordering is turned on, the PO will be sent automatically to the distributor(s).

If you are working with a Manual Order,

click on the PO-number to review the status.

Use our email client to send the PO to the supplier with the PDF attached.

Ensure the PO Status is always updated.

 Example: Move to SUBMITTED once you have emailed to the distributor.
 Mark as COMPLETE once you they have confirmed.



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We recommend inputting all details into each Order to keep your team and customers up to date, particularly

Delivery Information with Tracking and2 Serial Numbers.

NB. EDI Ordering automatically populates these fields as they become available.

Next, in the top left corner click **My Toolset** and navigate to your **Purchase Orders**.



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The Purchase Orders page provides an overview of POs and – most importantly – whether they have been responded to yet.

 Advanced filtering can help you search, organise and view POs.
 Naturally, Manual Orders require monitoring and should be updated following your correspondence with the supplier.

NB. Any EDI orders should automatically display as Completed because they are fulfilled electronically.

NB. If you are working with a separate system that is not integrated, you can

Download the raw data to plug in.





# Thank you

You're now ready to move onto Module 6: Working With Magento.

If you have any further questions, please email or call your Stock In The Channel Account Manager and they will be happy to provide any additional information.

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