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## Editing a Sales Order On Dealer Services

You must have previously received access to the **Edit Open Sales Order** link located under the **Process Customer Sales Order** menu to make changes to orders.

You should contact [Helpdesk@sprich.com](mailto:Helpdesk@sprich.com) to request access to all functions within this application.

### Navigation

- Log into Dealer Services
- Select **Order Processing and Returns** ( a new tab in the Browser will open)
- Using the new window on the browser, navigate from left to right on the main menu bar to **Processing Customer Sales Order**
- Click on **Process Customer Sales Order** to expand the view of your available options.
- Move down the menu list and click on **Edit Open Sales Order**

### Searching

Retrieve the sales order you want to edit by entering the Sales Order # or PickTicket # in the highlighted box and click the **Search** button on the right of the page. If the order status prohibits the order from edits, the application will provide a related message.



One user is allowed to edit an order at a any particular time. You will not be allowed to edit a sales order undergoing a pending change by another user.

## Why edit a sales order?

When changes to the information on a sales order are required prior to shipping, you must interact with a live order by using the Edit Open Sales Order function. The changes could be related to text found in a field shown in the **Header Details**, **Lines Details**, or changes related to the shipping method found in the **PickTicket / Release Details** of the order.

- Header Detail changes include updates to information located on the header of a sales order. These fields are listed below:

Placed By, Attention, Route, Reference, Customer PO, Order Comments, Ship Label Comments, Ship To Address, and Ship From Address

- Line Detail changes include updates to the following:

Quantity ordered, Line Reference 1, and Line Reference 2, and Comments. Changes can also include deletion of any line of an order.



Line Comments are only editable on the prime line of an order, each sub-line is linked to the prime line and will display the comment from the prime line

- Release changes are modifications to the shipping method for the product on an order.

Please contact a Customer Service Representative to modify the shipping method for your order.

## Address Issues

Proper address information is important for all orders, however some order types will fail to flow through the order life-cycle when critical address information is missing or not validated on the order. When this occurs a status of HOLD will be created on the order. The on HOLD status will remain until the address issue is resolved.

***How do you resolve the address hold on an order?***

When an address hold occurs, the HOLD can be resolved by contacting an SP Richards Customer Service Representative. ( Processes exist to alert internal personnel of order issues so a call is not required)

Only orders with HOLD as the status appear on the Sales Order Hold Release Page for CSR.

***Why is the address information critical on specific order types?***

The order type has a direct relationship to how the address is used by our internal systems for shipment of an order. Drop Ship and Wrap & Label orders use address information provided on the order to produce the shipping label information. The printed label displaying the Name, Address, City, State, and Zip Code will be attached to packaging and used during delivery.

***What other things should be considered when editing an address?***

- Drop Ship orders are typically shipped using a non-SPR/non-SPR contracted common carrier so the address information is validated when the order is received.
- Additional validations may take place prior to shipping from SPR locations which require address edits to remove HOLDS from the order.
- Address edits are made to correct bad delivery addresses and assist with expedient delivery of products.
- Edits are also made to add information required by a carrier and prevent additional charges from carriers for failed delivery attempts.



The Dealer's Bill To Address is available for viewing on the Header details of the order but is not editable. This information is owned by our accounting systems, and requested changes should be referred to that department.

**Stock Order** - provided address information on a stock order is shown as the Dealer Address in the *Ship To* and the *Ship From* address on the order.

**Wrap & Label** - provided address information on a W&L order is a participating

Dealers Address in the *Ship From* and the *Ship To* is marked for the end consumer.

**Drop Ship** - provided address information is shipped to and marked for the end consumer. The *Ship From* address may also represent the Dealers address or use a SP Richards distribution center address on a consumer direct order. This option is provided in the application and these records may also be transmitted electronically by a Dealers' system.

## Using The Page

The basic steps to use the Sales Order Edit page are shown in this section. The steps are organized to match the layout of the page.

## Functional Buttons

Located at the top left of the page moving from Left to Right

- **Commit Changes**  
Click *Commit Changes* to save edit made to the page and release the order to the system for further processing
- **Cancel Order**  
Click *Cancel Order* to remove the entire order from the system.
- **Discard Changes**  
Click *Discard Changes* to cancel edits and release the sales order for further processing

## Header Edits

- Enter the Sales Order Number or Pick ticket and click *Search*

Click the [+] or [-] to expand or to collapse Header Details, Ship To Address, Ship From Address, or Bill To Address areas on the page

- **Header Detail**
  - Identify and click into the field to be changed.
  - Click X to clear all existing information from the field or click anywhere in the highlighted box and enter your changes
- **Ship To Address**
  - Identify and click into the field to be changed
  - Click X to clear the information from the field or click anywhere in the highlighted box and enter your changes

- **Commercial Address** is defaulted to *Yes*, click the drop down list and select *No* to change the value
- Ship From Address
  - **Use DC Address** is defaulted to *No*, click the drop down list and select *Yes* to change the value
  - Identify and click into the field to be changed.
  - Click *X* to clear the information from the field or click anywhere in the highlighted box and enter your changes
- Bill To Address
  - This data is read only. No changes are allow from the Sales Order Edit Page

## Line Edits

Editing a line allows you to completely *Cancel* the Item ordered or *Edit* the quantity ordered. Editing quantities to a lower number may cancel releases or pick tickets related to the line. This will only occur when a part of the order is being sourced by multiple distribution centers. Reference 1 and Reference 2 on any line is attached to the line on any associated release or picking ticket and will be updated with changes made to the line.

- Canceling a Line
  - Click on *Cancel* located on the end of the line (right side of the page)
  - A confirmation request will be displayed requiring a response, Are you sure you want to cancel the line?
  - Click *Yes* to cancel the line, or Click *No* to discard your request.
- Editing a Line
  - Click the + or - on to the left of the line number to expand the line to view more details. Click *Edit* to right of the screen to change the quantity ordered on the line. The application will make adjustments to the totals if multiple distribution centers are involved in sourcing the items ordered.
  - A smaller page will appear and the previous page will be shown in the background. Click in the Qty Ordered field and enter your new quantity.

- Click *Save & Close* located at the bottom of the page to keep your changes or Click *Discard Changes* to exit the pop up page without saving your changes.
- Editing References and Comments
  - Click on *Edit* to the left of the page
  - Click into the Reference field and enter your changes.
  - Click into the Comments field and enter your changes.
  - Click *Save & Close* to save your changes, Click *Discard Changes* to exit the page with saving your changes.
    - Click *Commit Changes* located at the top of the page to save your changes.

- **Browser Window**



CLOSING THE BROWSER WINDOW WILL LOCK THE SALES ORDER AND PREVENT OTHER USERS FROM ACCESSING THE RECORD. THE SALES ORDER WILL REMAIN LOCKED TO THE LAST USER ID ACCESSING THE SALES ORDER FOR EDITS FOR 60 MINUTES. UNSAVED CHANGES WILL BE DISCARDED WHEN THE RECORD IS RELEASED.

**Remember to commit your Sales Order edits before exiting the application.**