

Standard Operating Procedure

SAMPLE ORDER ENTRY

Dole & Bailey, Inc.

Implementation Date: 10/26/2023

- **PURPOSE:** For sales to be able to ship samples at \$0 to customers, while the value of the sample can still be accounted for on the Samples GL account

1. In Sales Order Entry – choose your sample account. Fill out the header of your order indicating that this item is a sample (the PO line, and the Comment line print on the invoice). Change your ship to, to your customer receiving the invoice.

Sales Order: 136344 Type: C

Customer: 18684 HOUSE SAMPLE ACCOUNT

1. Name and Address	2. Header	3. Lines	4. Instructions	5. Totals
<p>—Customer— <input type="button" value="Q"/></p> <p>Name: HOUSE SAMPLE ACCOUNT</p> <p>Address1: C/O DOLE & BAILEY, INC.</p> <p>Address2: 16 CONN STREET</p> <p>—International (3&4)—</p> <p>Address 3:</p> <p>Address 4:</p> <p>City: WOBURN State: MA</p> <p>Country: USA <input type="button" value="Q"/></p> <p>Zip Code: 01801 Phone: (781) 935-1234</p> <p>Attn To:</p> <p>Comment: THANK YOU FOR YOUR BUSINESS</p> <p>PO Number: SAMPLE Ship Via: OT <input type="button" value="Q"/></p> <p>Ship Day: Friday Ship Time:</p> <p>Phone No:</p> <p>Price Class: 1M <input type="button" value="Q"/></p>	<p><input type="button" value="Delivery Window"/></p> <p>Entered By:</p> <p>User: ABUT</p> <p>Date: 10/26/23</p> <p>Time: 12:07PM</p>	<p><input type="button" value="Ship from: S"/> <input type="button" value="Q"/></p> <p>Ship-to: <input type="button" value="Q"/> Same Enter</p> <p>Name: 123 MAIN STREET - NE HARBOR</p> <p>Address1: 123 MAIN STREET</p> <p>Address2: P.O. BOX #1075</p> <p>City: N.EAST HARBOR State: ME</p> <p>Zip Code: 04662 <input type="button" value="Customer"/></p> <p>Ship Date: 10/27/23 <input type="button" value="1M"/></p> <p>Date Code: OS <input type="button" value="Q"/></p> <p>Cancel Date: 00/00/00 <input type="button" value="1M"/></p> <p>Due Date: 00/00/00 <input type="button" value="1M"/></p> <p>Route: 05 <input type="button" value="Q"/></p> <p>Carrier Code: <input type="button" value="Q"/></p> <p>Carrier Sched: <input type="button" value="Q"/></p>	<p>Price Before Shipment <input type="checkbox"/></p> <p>Suspend Invoice Update <input type="checkbox"/></p> <p>Flight Code: <input type="button" value="Q"/></p>	

2. In the Lines tab, enter the product you are sampling. Enter the sell price at \$0. (You will get a warning that the price is below cost on the line, this is ok to say YES to continue).

Item Number: UGH1190B08 Prices Price: 0.00 Market Cost: 25.3375

Description 1: BEEF TNDRLIN STK CC 8Z UG AA

Description 2: BRZ 1190B 20/CS

of Pieces: Qty. Order: 1.00 U/M: EA

On Hand: 11.50 Avail: 7.50 Loc Res

Location: 010749D08 Weight: 0.5000 Dept: B Size:

Brand: Gross Weight: 0.0000

—C.O.O.L. Compliance— Contract:

Market GP%: -2533.75

—Discounts—

Base: .00

Add 1: .00

Add 2: .00

—Line Totals—

Extension: .00

Margin: %

Options

- Use the Remark button on the item to Remark that this item is a sample. If you would like to enter the sample value for the customer to see on the invoice, you may do so here.

Remark Information

Okay

Standard...

Remark Code:

Remark 1:

Remark 2:

Remark 3:

Remark 4:

Remark 5:

- Your sample order will now ship at \$0.

Dole and Bailey
 16 CONN ST.
 WOBURN, MA 01801
 Phone: 781-935-1234
 Fax: 781/935/1234



Sales Order 136344

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HOUSE SAMPLE ACCOUNT

C/O DOLE & BAILEY, INC.
 16 CONN STREET
 WOBURN, MA 01801

Ship To:
 123 MAIN STREET - NE HARBOR
 123 MAIN STREET
 P.O. BOX #1075
 N.EAST HARBOR, ME 04662

Order Date		Sched. Ship Date		Ship Via	FOB
10/26/23		10/27/23		OUR TRUCK	DLVD
Our Order Number		Purchase Order Number		Terms	Salesperson
136344		SAMPLE		COD	90
Quantity		Item Number	Description	Unit Price	Amount
Required	Shipped				
1		UGH1190B08	BEEF TNRLOIN STK CC 8Z UG BRZ 1190B SAMPLE FOR 123 MAIN SAMPLE VALUE \$29.80	0.00	0.00