

FSA Special Orders

Purpose:

To demonstrate how to process special orders

Guidelines:

Before processing, check the Notes tab in FSA for any requests or instructions. Then check the Payment cards tab for any authorization blocks or card declines. Status will be green saying, "Valid and open", and response will be "A (Checks successful)" if the card is good. If it has a block or shows any status in red, add notes and re-assign to the agent or to Exception team if it is an e-comm order.

| Status | Billing Status | Authorized Amount | ZIP Code Check | Address Check | Response | R |
|------------------|-------------------|-------------------|----------------|---------------|-----------------------|---|
| ◊ | Not yet processed | 0.00 | | | (Not Relevant) | |
| □ Valid and open | Not yet processed | 487.69 | | | A (Checks successful) | |

If there are no blocks, proceed with ordering.

Process:

| STEP | ACTION |
|------|--|
| 1 | Go to "Items" tab and click the "Edit" button in the top right corner |
| 2 | Check the location of the customer and determine which DC is closest |
| 3 | If product is available in a DC or via drop ship, it should auto-source. If there is a wheel & tire package and nothing auto-sources, click the article number to see if there is stock for each item, and note which ones need to be ordered  |

| | | Product Info Promotions | | | | | |
|--|---|-------------------------|-----------|-------------|--------------------|---|---|
| | | Availability | | | | | |
| | | WDOH01 | WDGA01 | WDTD01 | WDIL01 | WDCA01 | Vendor |
| | | 0 | 0 | 0 | 0 | 0 | 0 |
| | | Details | | | | | |
| 4 | Click the pencil to the right of the article you need to order | | | | | | |
| | Unit | Promotion Amount | Net Price | Item Number | Parent Item Number | | |
| 5 | .00 | 0.00 | 450.00 | 100 | |  |  |
| | If there is only 1 item on the order or if the items do not need mounting / balancing, studding, or heat cycling, determine if the product can be drop shipped to the customer. It can be drop shipped if: | | | | | | |
| 6 | <ol style="list-style-type: none"> When entering the article, zip code, and quantity in "Product Source Availability" it shows a drop ship vendor as an option The "API drop ships" section of the Auto send tab in the vendor sheet lists the | | | | | | |
| | <ol style="list-style-type: none"> Determine the closest location by searching in "Product source availability" or checking stock with the vendor Click the drop down for "DC override" in FSA and click "WDTX02" Enter the vendor number in the "Vendor override" space. Change the requested delivery date to 3 business days from the date you are placing the order | | | | | | |
| Click Submit and move onto step 8 | | | | | | | |
| 7 | If the product CANNOT be drop shipped: | | | | | | |
| | <ol style="list-style-type: none"> In a wheel and tire package, start with the wheel Click the drop-down arrow for "DC override" and select the closest DC to the customer Enter the vendor number in the "Vendor override" space Change the requested delivery date to 1 week from the date you are placing the order If the vendor is one that we order online from, via email, or via FSA, call or go online to check stock. Click submit If it is a wheel and tire package, repeat to source the rest of the order | | | | | | |
| Move on to step 8 | | | | | | | |

| 8 | <p>Once all product is sourced, these two columns will be full</p> <table border="1" data-bbox="458 291 894 561"> <thead> <tr> <th>S</th><th>Sourced From</th><th>Shipped From</th></tr> </thead> <tbody> <tr> <td></td><td>VISION WHEEL</td><td>WDIL01</td></tr> <tr> <td></td><td>WDIL01</td><td>WDIL01</td></tr> <tr> <td></td><td></td><td></td></tr> <tr> <td></td><td></td><td></td></tr> </tbody> </table> | S | Sourced From | Shipped From | | VISION WHEEL | WDIL01 | | WDIL01 | WDIL01 | | | | | | |
|---|---|------------------|-----------------|---|--|--------------|--------|------|--------|--------|--|--|--|--|--|--|
| S | Sourced From | Shipped From | | | | | | | | | | | | | | |
| | VISION WHEEL | WDIL01 | | | | | | | | | | | | | | |
| | WDIL01 | WDIL01 | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | |
| 9 | <p>Click Go to Checkout</p> <div style="border: 1px solid #ccc; padding: 5px; text-align: center;"> Go to Checkout Cancel </div> | | | | | | | | | | | | | | | |
| 10 | <p>Click Next until you get to the “Order Summary” screen</p> <p>4. Order Summary</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">Shipping Address</td> <td style="width: 50%;">Billing Address</td> </tr> <tr> <td>Ship To: Customer Name: Andrew Bernaba</td> <td>Bill To: Andrew Bernaba Address Line 1: 93 Congers Rd</td> </tr> </table> | Shipping Address | Billing Address | Ship To: Customer Name: Andrew Bernaba | Bill To: Andrew Bernaba Address Line 1: 93 Congers Rd | | | | | | | | | | | |
| Shipping Address | Billing Address | | | | | | | | | | | | | | | |
| Ship To: Customer Name: Andrew Bernaba | Bill To: Andrew Bernaba Address Line 1: 93 Congers Rd | | | | | | | | | | | | | | | |
| 11 | <p>If the vendor requires orders to be placed over the phone, call them once you get to this screen. If not, double check the DC and the vendor for each product</p> | | | | | | | | | | | | | | | |
| 12 | <p>Click Make payment once stock has been confirmed and/or the information has been double-checked</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 25%; text-align: center;">Amount</td> <td style="width: 25%; text-align: center;">Tax</td> <td style="width: 25%; text-align: center;">Sub Total</td> <td style="width: 25%; text-align: center;">Total</td> </tr> <tr> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>450.00</td> </tr> </table> <div style="border: 1px solid #ccc; padding: 5px; text-align: center;"> View Cart Previous Make Payment Cancel </div> | Amount | Tax | Sub Total | Total | 0.00 | 0.00 | 0.00 | 450.00 | | | | | | | |
| Amount | Tax | Sub Total | Total | | | | | | | | | | | | | |
| 0.00 | 0.00 | 0.00 | 450.00 | | | | | | | | | | | | | |
| 13 | <p>Click Update order</p> <div style="border: 1px solid #ccc; padding: 5px; text-align: center;"> Back to Checkout Update Order Cancel </div> | | | | | | | | | | | | | | | |

| | |
|--------------|---|
| 14 | <p>Click the order number on the pop-up, DO NOT CLICK "OK"</p> <p><input checked="" type="checkbox"/> Success</p> <p>Order updated successfully: 5001656587</p> |
| 15 | <p>Go to "Related orders" and use PO to place the order over the phone or online. If you need to send an email, click the PO number and click the "Items" Segment. Use this to screenshot to send the order to the vendor</p> |
| 16 | <p>After placing the order, or in the case of a drop ship / auto-send order - check to make sure the PO was created, leave notes on the order with the <i>date, time, first initial, last name, and SS</i> along with information on how the order was placed as well as any confirmation number:</p> <p><i>9/29/2022 2:41pm JSherrell SS- Wheel drop shipped to DC, everything else was in stock</i></p> |
| 17 | <p>Exit the order by clicking the back arrow or the SAP/Discount tire logo</p> |
| Note: | <p>IF:</p> <ul style="list-style-type: none"> • The order does not create a PO, but the sourcing remains the same, check to see if there is a "Special Instructions" delivery block and click Remove Delivery Block. Once removed, refresh to see the PO. • Order is from MUL2ECCPRD and starts with "5000-", check stock and order if possible. <ul style="list-style-type: none"> ○ If it is in stock and you can order, send the "Special order" email template to the customer from esales@discounttire.com and remove your signature. ○ If it is not in stock and cannot be ordered send the customer the no stock email template from esales@discounttire.com and remove your signature. ○ Make sure to leave notes that state that you emailed the customer |

Contact:

Juliette Sherrill - julie.sherrill@discounttire.com
James Gelowitz - james.gelowitz@discounttire.com