

# Source.ca Online Order Process

This document will outline the online order process for Source **Sales Representatives** and store **Champions**.

1. When an order is received, it will be displayed on the Champion's dashboard. Additionally, a back-up outlook email notification will automatically be sent out.
2. Within one hour, the **champion** must:
  - a. Check in Syspro for New/Exiting client status. If an existing customer, check the 'existing customer' box.
  - b. Check that the 'Reason for request' (on all form requests) matches the request.

Reason for Request:

Admin / Warranty / Repair

Customer Message (editable in 'Request a Quote Order Settings' below):

Looking to replace the draw lock on my desk as the key is missing.

- c. Update account info as needed and assign order to the appropriate **Sales Rep** by inserting email address into the '**Assigned to**' field and hitting the 'Update' tab.
- d. If the customer's assigned **Sales Rep** is away, the order is to be assigned to the first available **Sales Rep**. who will be responsible to update and maintain the order.
- e. All **Non-Sale** related requests (service, warranty, flyer requests) are to be maintained by the **Champion** and updated on the Dashboard as applicable.

3. Within 1-hour the **Sales Rep**:
  - a. Receives order notification and updates the order status to "**In Process**".

Status:

In-process

- b. Contacts the customer.

- c. Updates whatever is relevant:
  - i. Status
  - ii. Syspro order number
  - iii. Existing customer field
  - iv. Order notes and details
    - Examples: Quote Sent, Pending Approval, Asked for Clarification, Order Scheduled for Delivery
  - v. If a quote request order is in progress, change the status to **Quoted** and when the quote is complete, insert the estimated \$ value in the **Quoted Amount** field. (This must be done even if a quote order is cancelled.)

#### 4. Sales Rep

- a. Update orders weekly.
- b. Update statuses and notes as they change.
- c. Zero value orders such as Space Planning, quote requests should be updated at minimum *WEEKLY* and comments added.
  - Comment examples: Working on drawings, waiting on MFG quote, on-site scheduled for March 1, waiting for approvals, etc.

#### Completing an Order

- a. Once the order is booked for delivery, note the delivery date in the **Order Notes** field.
- b. Insert the SYSPRO # into the SYSPRO ORDER ID field and insert the \$ amount of the order into the NET MERCHANDISE (SYSPRO) field.
- c. Ensure Account Information & Syspro Order number are accurate.
- d. Change order status to **Completed Offline**.

#### Cancelling an Order

- a. Change the Status to **Cancelled**.
- b. Select the drop-down reason for the cancellation and add specific info/details as needed in the **Cancelled Order Note** field. Three of these statuses have a star beside of them, indicating that a cancelled order note is **mandatory**. These three statuses are: Product not available/backordered, purchased elsewhere, and other.

<p><b>Status:</b></p> <p>Cancelled</p> <hr/> <p><b>Handling Store:</b></p> <p>Burnaby</p> <p><small>Use this field to change the store handling this order.</small></p> <p><b>Order has no value?</b></p> <p><input checked="" type="checkbox"/> Yes (ie.: For service or flyer requests)</p>	<p><b>Cancelled Order Reason (* Cancelled Order Note is required):</b></p> <ul style="list-style-type: none"> <li>✓ - Select -</li> <li>No response from customer</li> <li>Price – Too expensive</li> <li>Product not available/backordered (note required)*</li> <li>Delivery charges</li> <li>Not purchasing at this time</li> <li>Inquiry/wanted a quote only</li> <li>Purchased elsewhere (note required)*</li> <li>Service request</li> <li>Admin, zero value, SPAM, duplicates</li> <li>Other (note required)*</li> </ul>
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**Note: An order cannot be cancelled without a drop-down reason being chosen, and further explanation must be given for the mandatory starred fields.**

**Champion - EVERY Thursday**

Follow up on Orders > One week old

If necessary, send update requests to **Sales Rep**. Record request in **Order Notes** field. **Sales Rep** must respond within 24 hours.

**Champion** to follow up in Dashboard on Friday to see that note has been added

**Online Supervisor - EVERY Tuesday**

Follow up on orders that have not been recently updated by the **Sales Rep**.

Resend follow-up requests to **Sales Rep**, if no response or updates made.

Do not include the **Champion** in this step. **Sales Rep** must respond within 24 hours.