Initial Set-Up
Dallas Address: 10410 Finnell St. Dallas, TX 75220
Paso Robles Address: 3600 Dry Creek Road, Paso Robles, CA 93446
San Juan Ranch – Paso: PO Box 2, Shandon, CA 93461, Gate code: 6456
San Juan Ranch – Dallas: 613 FM 1885 W., Weatherford, TX 76088

Business Hours: Monday – Friday 5 am – 6 pm (PST), Saturday 8:30 – 5 pm (PST).
Pharmacy: Monday – Friday 8 am – 5 pm (PST)

Animal Health Contacts:

Dallas Sales: 491
Elissa*: 655
Kaycee: 665
Jason: 654
Victoria: 653
Lacy: 657

Amazon/Dallas Sales:
Ashley: 656

Paso Robles Sales: 491
Sarah: 427
Alie: 428
Josie: 493
Kathy: 494

Pharmacy: 490
Paul: 425
Krista: 404

Paso Robles Office:
Amanda*: 402
Alisha: 406

UltraCruz:
Casey: 426
Supplement: 483
Lani: 450
Sarah: 452
Ryan: 485
Ricky: 437

Purchasing - AH:
Samantha: 423
Renee: 220
Tanya/Jeff: 221
Andrea: 222

Shipping Warehouse – Dallas:
Shawn: 632
Robert: 631
Diem: 620
Zach: 621

Shipping Warehouse PR:
Lauren: 415
Tim: 432
Lorea: 431
Morgan: 424

Dallas: 491

CS Dallas: 6304/401

Accounting:
Ada: 139
Melinda: 137
Leo: 185
Thang: 134
Annie: 155
Yanghong: 640
Justin: 644
Hunter: 642
Krystle: 641
Rachel: 645
Claudia: 643

TS: 101

Graphic/Publications:

IT:
Emerson: 448
Kevin: 446
Eric: 445
# Commonly Used Animal Health SAP Transaction Codes

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>VA01</td>
<td>Create a new sales order</td>
</tr>
<tr>
<td>VA02</td>
<td>Change an existing sales order</td>
</tr>
<tr>
<td>VA03</td>
<td>Display an existing sales order</td>
</tr>
<tr>
<td>ZPOS</td>
<td>Walk-In orders</td>
</tr>
<tr>
<td>VA21</td>
<td>Create a quote</td>
</tr>
<tr>
<td>VA22</td>
<td>Change an existing quote</td>
</tr>
<tr>
<td>VA23</td>
<td>Display an existing quote</td>
</tr>
<tr>
<td>VL02N</td>
<td>Change outbound delivery</td>
</tr>
<tr>
<td>VF03</td>
<td>Print an invoice</td>
</tr>
<tr>
<td>VKM1</td>
<td>Blocked SD Documents</td>
</tr>
<tr>
<td>ZCUST</td>
<td>Create customer</td>
</tr>
<tr>
<td>XD01</td>
<td>Create customer</td>
</tr>
<tr>
<td>XD02</td>
<td>Change customer</td>
</tr>
<tr>
<td>XD03</td>
<td>Display customer</td>
</tr>
<tr>
<td>MMBE</td>
<td>Stock Overview</td>
</tr>
<tr>
<td>MD04</td>
<td>Stock/Requirements List</td>
</tr>
<tr>
<td>ZVA05R1</td>
<td>AH Sales Report</td>
</tr>
<tr>
<td>ZVA05R2</td>
<td>AH Daily Report</td>
</tr>
<tr>
<td>ZBKO</td>
<td>Backorder Report</td>
</tr>
<tr>
<td>ZVA05</td>
<td>Search by catalog number</td>
</tr>
<tr>
<td>FBL5N</td>
<td>Customer Line Items</td>
</tr>
<tr>
<td>ZWEB</td>
<td>Web Order Query</td>
</tr>
</tbody>
</table>
Organizing Your SAP Favorites:

SAP transaction codes on your “Favorites” list tend to be transactions that you use multiple times daily. Creating a “Favorites” list will save you time and keep your transaction codes organized.

Example SAP Favorites List:
Adding Transaction Codes to “Favorites”

To add a transaction code to your “Favorites” list, simply click on “Favorites” >> “Insert transaction” (you must know the SAP transaction code)

Type in the appropriate transaction code that you would like to add to your favorites. Click on the green check mark.
If you do not know the SAP transaction code, find the transaction you would like to add to your “Favorites” list (under “user menu”) and right click on the description. Select “Add to Favorites”

Drag the new favorite to your desired location.

To edit the name of the favorite, right click >> select, “Change Favorite”
Edit the text to your liking, and then click on the green check mark.
Shipping/Carrier Information
Santa Cruz Animal Health Shipping Fees:

**Room Temperature:**
Shipped FedEx Ground
**FREE SHIPPING** for orders over $50 (AH or RX)
Flat $7.95 for AH orders under $50
Flat $24.50 for RX orders under $50

**Blue Ice:**
Ships FedEx Overnight
**FREE SHIPPING** for orders over $250 (AH or RX)
Domestic Standard Blue $32.50 for AH orders under $250
Domestic Standard Blue $32.50 for RX orders under $250
Domestic Priority Blue $42.50 for orders under $250

For customers residing in Hawaii and Alaska:
Up to 5lbs = $37.00
10lbs = $50.00
15lbs = $61.00
20lbs = $75.00
25lbs = $86.00
30lbs = $99.00
40lbs = $123.00

For customer residing in Canada (CAN ONLY SHIP ULTRACRUZ PRODUCTS TO CANADA):
Up to 5lbs = $19.00
10lbs = $22.00
15lbs = $26.00
20lbs = $30.00
25lbs = $34.00
30lbs = $38.00
40lbs = $47.00

**Animal Health Shipping Cutoff Times:**
Room temperature/Ground: 4:00 p.m. (PST)
Blue Ice: 3:15 p.m. (PST)
**Contact Amanda Montanio (x402, montanioa@scbt.com) for exceptions**
Customer Request for Overnight Shipping

Because of large differences in weight, as well as shipping location, Fed-Ex overnight shipping prices vary greatly.

1. Input the order and verify the shipping address. Ask if the customer has a preference between priority overnight (delivered before 10 am) or standard overnight (delivered before 3 pm).

2. Let the customer know you will call them back within a certain time period (should not be much longer than 15 minutes). Put a block on the order.

3. Email Tim (smallt@scbt.com) if shipping from Paso, or Shawn (argandonas@scbt.com) if shipping from Dallas, with the following information: the SC #(s), shipping state or zip code, and type of overnight shipping (standard or priority). If you haven't heard from shipping within 5-10 minutes, call shipping, x433 in Paso, or x625 in Dallas to request a shipping quote.

4. Call the customer back to provide them with an accurate shipping charge for their order.

5. Once the customer has agreed to the overnight shipping charges, input the charge into the order:
   a. Delete all existing shipping charges
b. Click the down arrow and select “Ambient Freight”

c. Input the accurate shipping charge for that specific item(s)>>Enter
(You may have to switch tabs and go back to the conditions tab to get an accurate total)
d. Make accurate and detailed notes in both internal and shipping texts.

e. Remove the block, and release the order.
# Saturday Delivery Procedure

If you need a Saturday delivery, proceed to the following steps:

1. Call FedEx (1-800-GOFEDEx) to verify a Saturday shipment is possible (must provide the customer’s ship-to zip code). Notify our shipping department and discuss feasibility of this shipping method.

2. Adjust the incoterms in SAP to reflect Saturday shipping customer preference. The correct incoterm is FSA "Fed Ex Saturday".

<table>
<thead>
<tr>
<th>Item</th>
<th>Material</th>
<th>Order Quantity</th>
<th>Description</th>
<th>Amount</th>
<th>Item Packaging</th>
<th>Means Of Tra.</th>
<th>Domestic</th>
<th>Incot.</th>
<th>POItem</th>
</tr>
</thead>
<tbody>
<tr>
<td>1560-143167</td>
<td>3.44</td>
<td>UltraCruz Equine Wellness/Joint</td>
<td>107.40</td>
<td></td>
<td>Ground Ha..</td>
<td></td>
<td></td>
<td>FSA</td>
<td></td>
</tr>
</tbody>
</table>

**Exco**

- NIK  Per Bike
- DEA  DHL Dallas
- DNL  DHL
- PCD  FEDEX Collect
- PGR  FEDEX Ground
- PIP  FEDEX Intl.Priority
- PPR  FEDEX Priority
- FSA  FEDEX Saturday
- PST  FEDEX Standard
- GEX  Globalnet Express
- POE  Point-of-Sale
- STH  Saturday by Monday
- TPY  TNT Priority
- TPN  TNT Standard
- TNW  TNT Saturday
- UPP  UPS Priority
- UPS  UPS Standard
- UPS  UPS Saturday
3. Adjust shipping charges, if applicable (see overnight procedure).

4. Make sure the notes in the shipping text are up to date and specifically mention “Saturday Delivery.”
5. If the case is sensitive, go for overkill and compose an email in addition to all the above. Email subject line should contain the words "Special SATURDAY Delivery/ Order NUMBER". Email the shipping department responsible for the package (Paso vs. Dallas). Explain that a Saturday delivery is mandatory and your email is to alert everyone regarding the special delivery request. Ask for a response to the email confirming the Saturday delivery is completed.
Shipping Conditions – Dangerous Goods

Animal Health Sales Representatives need to verify that the Dangerous Goods fee ($40) is applied for US shipping addresses.

- Once a dangerous goods AH product has been entered into a SAP order, an internal message will pop up informing you that it is an dangerous goods product.

- Go to the conditions tab and check to ensure the associated $40.00 fee has been applied to the order.

- REMOVE THIS FEE FOR WALK-IN CUSTOMERS
• For gallon-sized products, there is one DG charge per quantity 4. (Example: sc-360308, Isopropyl Alcohol, 70%, gal, quantity 8 will be charged two DG charges, for a total shipping charge of $80)

• These items will be shipped within 3-5 business days and CANNOT be shipped overnight.

• For orders over a certain amount, there is a possibility that this ZGFC shipping cost can be waived, especially if the customer becomes dissatisfied. Contact Amanda Montanio (mantanioa@scbt.com) for case-by-case exemption clearance.

• Make sure to add appropriate notes into the Sales Order Text.
**Current List of DG Animal Health Products:**

- SC-360306 - Agri-Mectin® Pour-On for Cattle, 250 ml
- SC-360304 - Agri-Mectin® Pour-On for Cattle, 1 L
- SC-360305 - Agri-Mectin® Pour-On for Cattle, 2.5 L
- SC-360307 - Agri-Mectin® Pour-On for Cattle, 5 L
- SC-395467 - Bimectin® Pour-On, 1 L
- SC-395468 - Bimectin® Pour-On, 2.5 L
- SC-359309 - Bimectin® Pour-On, 5 L
- SC-360341 - Iodine Tincture, 2%, gal
- SC-360308 - Isopropyl Alcohol, 70%, gal
- SC-361622 - Isopropyl Alcohol, 99%, gal
- SC-359307 - Ivomec® 1% Injection for Cattle and Swine, 500 ml
FileMaker Databases
FileMaker Databases

Use the following username/password combination for these databases:

Username: AH
Password: customers

AH Supply Report - (fm9.pr.scbt - 192.168.2.19)
Fed-Ex Tracking – (fm9.pr.scbt - 192.168.2.19)
Equine Brand Progress – (192.168.11.8)
Master Contact List – (Shanghai Server – 172.24.2.11)
UltraCruz Animal Supplements – (fm9.pr.scbt - 192.168.2.19)
UltraCruz Critical Care - (fm9.pr.scbt - 192.168.2.19)
UltraCruz Grooming Products - (fm9.pr.scbt - 192.168.2.19)
UltraCruz Pest Control - (fm9.pr.scbt - 192.168.2.19)

Use personal FileMaker username/password combination for the following:

AH Phone Log – (fm9.pr.scbt - 192.168.2.19)
AH Sales Contact – (fm9.pr.scbt - 192.168.2.19)
Fed-Ex Tracking Database

In order to track a package, first gather the following information:

- Order number
- Ship-to party name
- Ship-to party city/zip code
- Date the order was placed

Open Fed-Ex Tracking in FileMaker Server: 192.168.2.18
User: AH
Password: customers

- Execute a find (command + F)

- Enter 3 zeros before entering the order number >>> Enter.
• All tracking information for that order is presented. Each box has its own tracking number. Click on “Track Package.”
• A Safari window will open and provide you with the information for that package.
Requesting a Fed-Ex Return Label

Sales representatives may need to email (of fax) customers a Fed-Ex return label in the occurrence of a shipping error, return, etc. The following information needs to be gathered before a request is sent:

- Customer order number
- Fed-Ex tracking number
- Customer contact information

Use Fed-Ex Tracking in your FileMaker Database.

Take a screen shot of the “Shipment Facts” (below the tracking information)

Go back into the sales order and select the magnifying glass

Select the “Partners” tab and double click on the “Ship-To party” line item

Take a screen shot of the customer’s ship-to information
Make sure to put appropriate notes in the Sales Order Internal notes explaining why the customer is needing a return label.

Email your contact for creating the Fed-Ex return label (in Paso, Josie, Amanda, or Tim), providing them with both screen shots. Indicate whether a pick-up date needs to be scheduled or if the customer will be dropping the package off at a Fed-Ex location.

Once you have received the pdf copy of the return label, email the customer providing them with specific instructions on how to proceed with the return.
FileMaker Database - AH Supply Report

AH Supply Report is a quick way of looking up items while on the phone with a customer without inputting the item into an order. It is also helpful when the customer does not know a specific catalog number or product name. AH Supply Report can give you information on inventory, backorder status, price and manufacturer.

User: AH
Password: customers

Once AH Supply Report has been opened once on your computer, select File >> Open Recent >> AH Supply Report
To increase text size, select View >> Zoom In

Execute a find (command F). Type in the catalog (SC) number (SC-#######) you would like to search. Enter.

You can also execute a find by product name. If you are unsure of spelling or the complete name, simply type in the first couple letters. Enter. All options with that spelling will be provided.
You can also search for multiple items with similar names (inform customers of different options):
If an animal health item is currently on backorder, you can provide the customer with an ETA. You can also determine if the item is available at another warehouse (Dallas vs. Paso Robles)

The item below is available in Dallas, but not in Paso Robles.

**NOTE: For the most up-to-date inventory, use MMBE or MD04 in SAP**
Callbacks
Procedure & Dialogue For Customer Callback’s

It is Santa Cruz Animal Health procedure to follow up with customers after they have placed an order with us and received their items. These calls typically take place a day or two after the package has been delivered to the customer.

Before placing a callback call, sales rep’s need to follow these steps to ensure that the customer has received their package:

In FileMaker, open recent >> AH Sales Contact

Once in AH Sales Contact, Layout: Orders

Fill out the appropriate information (Shipping state, order date [**to search for a specific date range, separate the dates by 3 periods. EX: 2/10…2/14]. Search for a specific status, if applicable. Enter.


• Scroll down to the most recent sale date.
• Copy the sales order number.
• Paste the sales order number into VA02. Review the order.
• In FileMaker, open recent >> Fed-Ex Tracking

• Execute a find (command F), type three zeros and paste the sales order number, Enter.
• Track the package.
• If results show that the package has been delivered to a customer, than a callback call can be made.

• Go back into the sales order. Click on the magnifying glass >> “Partners” tab >> double click on the customer’s Sold-To party line item to access the customer’s contact information. Contact information can also be found in AH Sales contact next to the account number.
• Call the customer.
• After the callback has been made, include notes in Sales Order Internal text. Include notes that explain if you spoke with (SW) customer, left a message (LMOM), etc. Also include the date of the callback and your initials.

  2/17/14 - Ch done. $5

• Go back into AH Sales Contact, click on the “PP” button to also input notes. Input more detailed notes into this area (LMOM – Left message on machine, SW – spoke with customer, customer’s pet’s names, etc.). Sales reps can refer back to these detailed notes for future callbacks.
• Keep a tally of how many callbacks you execute each day and report them to your manager

**Callback Dialogue:**

“Hello/Good Morning/Good Afternoon, this is _______ with Santa Cruz Animal Health. Is _______ available?”

“How are you doing today?”

“I wanted to check in with you make sure you received your _______________ that we shipped out to you on the ___, on-time and safely.”

“Thank you so much for your order. Have a great day.”

**Leaving a voicemail:**

“Hello/Good Morning/Good Afternoon, this is _______ with Santa Cruz Animal Health. I am calling to check in with you to make sure that you received your _______________ (ex: “UltraCruz Equine Wellness/Joint Care”) that you order from us on ______________ (ex: the 2nd of February/Last Friday). I wanted to make sure that everything arrived safely and on-time. If you have any questions, please do not hesitate to call us at 800.457.3801 extension 491. Thank you so much for your order. Have a great day.”
Phone Orders
Phone Order Checklist

Before you get off the phone with a customer, run through this checklist to ensure that essential information is recorded.

☐ Review the order with the customer, verify that you have correct items and quantities and the customer is aware of cost per unit

☐ Verify the customer’s ship-to address (CANNOT BE PO BOX)

☐ Check to ensure appropriate contact information is available for the customer (telephone number and email address)

☐ Verify the customer’s payment terms

☐ Verify any shipping charges with the customer/order total

☐ Notify the customer if there is a backordered item. Provide ETA

☐ Notify the customer if items will be shipped from different Locations

☐ Give customer an ETA for package to be delivered (generally 3-5 business days)

☐ Provide the customer with an order confirmation number (sales order number) for reference

☐ Provide the customer with appropriate contact information for animal health (you may want to give the customer your direct extension)
Creating a Sales Order – Phone

After adequate training with a senior sales representative, phone orders can be taken by new representatives under supervision of their trainer. It is recommended that new sales reps use hard copy order forms in addition to using SAP.

“Good morning/afternoon/evening, Santa Cruz Animal Health, this is ________, how can I help you?”

“Have you previously ordered from us?”

**If customer answer is “YES,” proceed to VA01. If answer is “NO,” write all the information on a hard copy order form.**

Transaction Code: VA01

Order Type: OR
Sales Organization: 1000
Distribution Channel: 10
Division: 10

To look up a customers account:
• Click on the down arrow in “Sold-to Party”

![Create US Order: Overview](image)

• Enter either their billing zip code or their last name in the appropriate entry field. Entries need to begin and end with asterisks (*). Select “No Restriction” >> Enter.

![Search Customers](image)

OR:
Click on the “Name” column to sort customers alphabetically.

<table>
<thead>
<tr>
<th>Search Term</th>
<th>Postal Code</th>
<th>City</th>
<th>Name 1</th>
<th>Customer</th>
</tr>
</thead>
<tbody>
<tr>
<td>CAS02-002</td>
<td>93446</td>
<td>PASO ROBLES</td>
<td>A-SPEAR CATTLE (EXEMPT, WALK)</td>
<td>CAS02-002</td>
</tr>
<tr>
<td>CAS02-003</td>
<td>93446</td>
<td>PASO ROBLES</td>
<td>A-SPEAR CATTLE (TAX, WALK)</td>
<td>CAS02-003</td>
</tr>
<tr>
<td>TAD04</td>
<td>93446</td>
<td>PASO ROBLES</td>
<td>ADAM HENLEY</td>
<td>TAD04</td>
</tr>
<tr>
<td>TAD04</td>
<td>93446</td>
<td>PASO ROBLES</td>
<td>ADAM HENLEY</td>
<td>TAD04-001</td>
</tr>
<tr>
<td>QAD04</td>
<td>93446</td>
<td>PASO ROBLES</td>
<td>ADRIENNE SAVAGE (WALK-IN)</td>
<td>QAD04-002</td>
</tr>
<tr>
<td>QAG01</td>
<td>93446</td>
<td>PASO ROBLES</td>
<td>AGALOS CUTTING &amp; PERFORMA</td>
<td>QAG01</td>
</tr>
<tr>
<td>QAH01</td>
<td>93446</td>
<td>PASO ROBLES</td>
<td>ANNKA DOHERTY</td>
<td>QAH01</td>
</tr>
<tr>
<td>QAH01</td>
<td>93446</td>
<td>PASO ROBLES</td>
<td>ANNKA DOHERTY (WALK-IN)</td>
<td>QAH01-001</td>
</tr>
<tr>
<td>QAL05</td>
<td>93446</td>
<td>PASO ROBLES</td>
<td>ALE CASTILLO</td>
<td>QAL05</td>
</tr>
<tr>
<td>QAL04-001</td>
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<td>PASO ROBLES</td>
<td>ALICE PELTIER (WALK IN)</td>
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<tr>
<td>QAL03</td>
<td>93446</td>
<td>PASO ROBLES</td>
<td>ALIE MCKEE (WALK-IN)</td>
<td>QAL03-002</td>
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<tr>
<td>QAL09</td>
<td>93446</td>
<td>PASO ROBLES</td>
<td>ALLEY RANCH (WALK-IN)</td>
<td>QAL09-002</td>
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<tr>
<td>QAL08</td>
<td>93446</td>
<td>PASO ROBLES</td>
<td>ALTON ENERY (NON-TAX WALK)</td>
<td>QAL08-004</td>
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<tr>
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<td>PASO ROBLES</td>
<td>ALTON ENERY (TAX-WALK IN)</td>
<td>QAL08-002</td>
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<tr>
<td>QAM04</td>
<td>93446</td>
<td>PASO ROBLES</td>
<td>ANANDA NEAD (WALK-IN)</td>
<td>QAM04-002</td>
</tr>
<tr>
<td>QAM09</td>
<td>93446</td>
<td>PASO ROBLES</td>
<td>ANY NORRIS</td>
<td>QAM09</td>
</tr>
<tr>
<td>QAM09</td>
<td>93446</td>
<td>PASO ROBLES</td>
<td>ANY NORRIS</td>
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</tr>
<tr>
<td>QCL15</td>
<td>93446</td>
<td>PASO ROBLES</td>
<td>ANCHOR CATTLE CO (WALK, E)</td>
<td>QCL15-003</td>
</tr>
<tr>
<td>QCL15</td>
<td>93446</td>
<td>PASO ROBLES</td>
<td>ANCHOR CATTLE CO</td>
<td>QCL15-002</td>
</tr>
<tr>
<td>QAN09</td>
<td>93446</td>
<td>PASO ROBLES</td>
<td>ANDREA BAXTER</td>
<td>QAN09</td>
</tr>
<tr>
<td>QAN09</td>
<td>93446</td>
<td>PASO ROBLES</td>
<td>ANGIE HAGER (WALK-IN)</td>
<td>QAN09-002</td>
</tr>
<tr>
<td>QAG04</td>
<td>93446</td>
<td>PASO ROBLES</td>
<td>ANGIE MARQUES (WALK IN)</td>
<td>QAG04-001</td>
</tr>
<tr>
<td>CAN09</td>
<td>93446</td>
<td>PASO ROBLES</td>
<td>ANTELOPE RANCH (LE) (WALK)</td>
<td>CAN09-002</td>
</tr>
<tr>
<td>CAN09</td>
<td>93446</td>
<td>PASO ROBLES</td>
<td>ANTELOPE RANCH (LE) (WALK)</td>
<td>CAN09-003</td>
</tr>
<tr>
<td>QAR02-002</td>
<td>93446</td>
<td>PASO ROBLES</td>
<td>ARELETTE BALDWIN (WALK-IN)</td>
<td>QAR02-002</td>
</tr>
<tr>
<td>QAS01</td>
<td>93446</td>
<td>PASO ROBLES</td>
<td>ASHLEY MARSHALL (WALK-IN)</td>
<td>QAS01-002</td>
</tr>
<tr>
<td>CAT24</td>
<td>93446</td>
<td>PASO ROBLES</td>
<td>ATASCADERO HAY &amp; FEED (W)</td>
<td>CAT24-002</td>
</tr>
<tr>
<td>CBG02</td>
<td>93446</td>
<td>PASO ROBLES</td>
<td>B &amp; G CATTLE</td>
<td>CBG02</td>
</tr>
<tr>
<td>CBV001</td>
<td>93446</td>
<td>PASO ROBLES</td>
<td>B &amp; E VINEYARD</td>
<td>CBV001-003</td>
</tr>
</tbody>
</table>
• Double click on the appropriate sold-to party (XXX##)

| QME16 | 93446 | PASO ROBLES | RICK & MARGIE MEEKS (WALK-OUT) | QME16-001 |
| CRIC001 | 93446 | PASO ROBLES | RICK MACHADO (WALK-IN, EX) | CRIC001-03 |
| QRI04 | 93446 | PASO ROBLES | RICKY MONTANIO | QRI04 |
| QRO49 | 93446 | PASO ROBLES | ROBERT & NOREEN GOODWIN | QRO49 |
| QRO49 | 93446 | PASO ROBLES | ROBERT & NOREEN GOODWIN | QRO49-002 |
| QRB21 | 93446 | PASO ROBLES | ROBERT HOPKINS | QRB21 |
| QRB21 | 93446 | PASO ROBLES | ROBERT HOPKINS | QRB21-001 |
| QRO55 | 93446 | PASO ROBLES | ROBERT JAUREGUI | QRO55 |
| QRO55 | 93446 | PASO ROBLES | ROBERT JAUREGUI (WALK-IN) | QRO55-003 |
| QRO55 | 93446 | PASO ROBLES | ROBERT JAUREGUI | QRO55-002 |

• Enter appropriate PO Number (Customers first name in all CAPS. If PO already exists for that first name, use first and last) >>Enter:

**Create US Order: Overview**

<table>
<thead>
<tr>
<th>US Order</th>
<th>Net Value</th>
<th>0.00 USD</th>
</tr>
</thead>
<tbody>
<tr>
<td>QRO55</td>
<td>RICKY MONTANIO</td>
<td>0.00 USD</td>
</tr>
<tr>
<td>QRO55-001</td>
<td>Ricky Montanio / 5845 Blacktail Pl / Paso Robles CA 93446</td>
<td></td>
</tr>
</tbody>
</table>

• The Ship-To Party (XXX##-00#) will automatically be inputted if the customer only has one ship-to account:

<table>
<thead>
<tr>
<th>US Order</th>
<th>Net Value</th>
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<td>Ricky Montanio / 5845 Blacktail Pl / Paso Robles CA 93446</td>
<td></td>
</tr>
</tbody>
</table>

• If the customer has multiple ship-to accounts, double click on the appropriate account:
**NOTE:** Items that receive EXEMPT status must be: medicated substances that are put on or in the animal. The customer MUST have a tax-exempt form on file in order to have a tax-exempt account created.

**Leaders Edge (LE) status** – select group of cattle ranchers that, due to their numbers, receive special discounted pricing on Zoetis products. These prices are automatically inputted into their account.

- Verify the customer’s ship-to address: (“Will we be shipping this order to 5845 Blacktail Place in Paso Robles, California?”)
- CANNOT SHIP TO PO BOXES

- Mark Delivery block as “AH - New Empl Review”
• Select appropriate payment terms (NT30 – due in 30 days/CC/CHK) and select order reason as “phone order” or “phone hard copy”

![Image of order interface]

• Click on “Material” and input the appropriate catalog number (SC-#####), enter quantity >>> Enter

![Table of order items]

• Repeat these steps for every item. You can verify quantity and price with the customer as you go.
  o AH Supply Report is a useful tool during this process to look up specific items and availability.
• Once all items have been inputted, proceed to check out. Click on the magnifying glass.

• Click on the “Conditions” tab. If customer qualifies for free shipping, highlight the “Ground Flat Fee” line item and click delete. Report to the customer their total.

**SEE SHIPPING TERMS SECTION FOR OUR SHIPPING POLICIES**
“Your total today, Mr./Ms. ______, is $115.57. How would you like to pay for that today: Visa, Master Card, or American Express?” (or billed – NT30)

- Click on the “Payment Cards” tab. Enter appropriate information.

Type: Visa, MC, or AMEX

Card number, Valid to, CVV, and Cardholder fields must be complete

**SANTA CRUZ ANIMAL HEALTH DOES NOT KEEP ANY CREDIT CARD INFORMATION ON FILE. THE CUSTOMER MUST PROVIDE CREDIT CARD INFORMATION EACH TIME THEY ORDER**
• Click on “Partners” tab. Double click on ship-to party line item. Enter appropriate ship-to address as verified by the customer.

At this point, if you choose to end the phone conversation with the customer, refer to, “Phone Order Checklist” to make sure you have key information for the order.

• Copy and paste email and phone information from Sold-To into Ship-To information. If email is provided, standard communication method should be switched to email. Enter.
• If there are any necessary notes to put in the order, click on the “Text” tab. “Sales Order Internal” is for sales rep notes, not to be seen by customers. “Shipping Instruction” is for notes to the pickers and shipping personnel. Internal notes should NOT go under “Form Header.”

• Once you have gone back through and reviewed the order, click save. Inform a senior sales representative of the sales order number. A senior rep will then review the order and release it.
If you need to go back into the order once you have saved it, select VA02 – Change Sales Order. The last order you were in will show in the order field >> Enter.
Phone: Hold For Pick Up Orders

Local customer's frequently call in ahead of time and place their orders with a representative over the phone with the intentions of coming in at a later time to pick up the order from the retail store in Paso Robles.

When taking these orders over the phone, please account for the following:

- **The Ship-To** account must be a walk-in account (address is 3600 Dry Creek Road, Paso Robles, CA 93446).
  - You can also use the generic walk in ship-to account:
    - ZWALK-001 (taxable) or ZCASH-002 (Exempt)*
      - *Customer must have signed CA exemption or resale form on file to qualify
      - Also note exempt vs. taxable items on order

- **Delivery Block:** A delivery block MUST be placed on the order when it is saved. **“Hold For Pick-Up”** is the most relevant block in this case. The block is then removed once the customer has picked up their order.

- **Payment Terms:** Customer's do NOT have to pay over the phone. Their payment information can be taken at the register. It is best that terms are left as NT30 if you are unsure of payment.
• **Order Reason:** If it is a phone order for pick up, order reason should be “Phone Order-Hold for pick-up”

Enter the material information as a regular sales order.

• Check inventory on items for plant 1000, execute an availability check.
• Change shipping conditions so they are all the same (Blue Express vs. Ground)
  o Customers who are NT30 will only receive one invoice per order.
  o Prevents the order from printing in the shipping department multiple times.

• **All items must be plant 1000**

• **All shipping must be removed**
• Ship-To address must be the retail store address

• Appropriate notes need to be made on the order
  o Internal Sales Notes:
    ▪ Provide the name of the caller, their contact information
    ▪ Indicate when the customer is coming in to pick up the items
    ▪ Indicate payment terms
    ▪ Notify an AH sales representative in Paso to collect the materials to have them ready for pick up. Provide them with the blocked sales order number. The Paso rep will then leave notes on the order indicating where the items are left.
Shipping Notes:

- “Walk In” notifies shipping that these items are NOT to be shipped.

Once you have completed the order, save with a block. Call a Paso Robles representative (Josie – 493, Sarah – 427, Alie – 428 or Kathy 494) to provide them with the sales order number. They will then get the items ready for pick up in the store.

Please note:

**Retail Store hours:**
Monday-Friday 7am – 6 pm PST
Saturday 8:30 am – 5 pm PST

**Directions to the store:**

Heading East on Hwy 46, turn left on “Airport Road” (you will see a water park right on the corner). Stay on Airport for about 1.5 miles. Turn right on “Dry Creek Road.” The store is about a mile down on the right. There is a white sign “Santa Cruz Animal Health.”

**Please do not hesitate to transfer local customers to Paso sales reps. Sometimes it is easier for them to provide information to customers regarding specific store items/events/locations**
Changing Locations on Orders
Changing Warehouse Locations on a Sales Order

For items that are at zero stock in one location, but are available in the other location, a manual location change in an SAP order is necessary for delivery.

If, after inputting a catalog (SC) number and quantity, the screen featured in the picture below appears, confirming that there is zero stock in that specific location for that specific product. Click “Continue.”

**US Order: Availability Control**

- Use the arrows to scroll over to Plant. Change plant to reflect the alternative location (1000 or 1020)
Once the plant is changed, highlight the line item. Execute an availability check.

Mark the check next to the item quantity. The product is available at this location and is now allocated to this specific sales order.

**Note:** When inputting the ship-to address on the order, SAP will automatically revert all locations back to the location for which the account was set when it was first created. Make sure appropriate locations are verified before you save the order.
Auto Ship
Creating “Auto-Ship” Orders

Auto-Ship is used for customers who routinely order the same product (ex: supplements) over the course of the same time period.

SAP Transaction Code: VA01

- Enter the date in which you would like the product to ship. The date needs to be entered in two locations (PO date & Req. deliv date). Do not press enter until you have input both dates.

- Once you have entered the appropriate date in which you would like the item to ship, enter the customer’s account information and PO number. SAP will alert you that the dates are set in the future >> Enter.
  - Remove the block
o Enter appropriate payment terms
o Select the appropriate order reason

Create US Order: Overview

- Enter the product(s) you would like to be auto-shipped
- Enter payment information
- In the shipping text, notes should state, “AUTO SHIPMENT SETUP FOR CUSTOMER – ORDER SET TO BE RELEASED ##/##/#### (date) – PLEASE CALL AMANDA WITH QUESTIONS”

- Add any internal sales notes if necessary
- Save the order
- Create subsequent Auto-Ship orders in this same manner

*NOTE: TO CHANGE A FUTURE DATE THAT HAS ALREADY BEEN SET TO AUTO-SHIP:
  - The line item must first be removed
  - Change the dates in both locations (PO date and Req deliv date)
  - Add the product back into the material area
  - Check to make sure shipping fees are removed, add necessary notes, check ship-to address, and save.
Order Confirmations
Emailing or Printing an Order Confirmation

If there is ever a need to print or email an order confirmation to a customer or a fellow AH sales representative, proceed to the following steps:

• SAP Transaction Code: VA02

• Enter the Sales Order Number associated with the order you would like to email. In the left-hand corner, “Sales Document” >> “Issue Output To”
• Highlight “Order Confirmation” line >> Click on the Print Preview Icon

• To print an order confirmation, select the 📑 icon.

• To email an order confirmation, highlight “E-mail Order Confirm”
  >> Click on the Print Preview Icon >> Select the 📑 icon

You may save the order confirmation to your desktop to include in your email. Rename the pdf file appropriately. To include it in your email, simply drag the attachment from you desktop to the content of your email.
Invoices
NT30 Customers: Looking up Amount Due OR Looking up Balance on Cruz Credit Accounts

SAP Transaction Code: FBL5N

- Enter the customer’s account number >> Execute

- The customer’s invoices and total amount due will be listed. Invoice numbers are under the column “Document No.”
• To print a particular invoice (VF03), see procedure “Printing an Invoice”

To look up a balance on a Cruz Credit Account, use the same SAP transaction code (FBL5N).

• Enter in the Cruz Credit account number under “Customer Account”
• Company Code = 1000
• Open Items = Checked
• Open at key date = Current date
• Normal Items = Checked
• Execute

The balance is the number at the bottom highlighted in yellow. **Note**: The balance must be negative for Cruz Credit accounts.
Emailing or Printing an Invoice

This transaction is used when a customer requests an invoice to be emailed or mailed to them.

SAP Transaction Code: VF03

In order to email or print an invoice, you need the invoice number. This can be found in the sales order by clicking on the Document Flow on the upper left hand corner.
In this case, the invoice number is 90801697. Some orders have more than one invoice due to multiple deliveries. Make sure to notate all invoice numbers.

• Go into VF03 and input the invoice number. Do NOT press enter.

![VF03 screen](image)

• Select “Billing document” >> “Issue Output to”

![Billing document screen](image)

• Select “Invoice Email” if emailing the invoice or printing the invoice on regular paper. Print or save the document to your desktop. Drag the document into your email to send.

![Output screen](image)
Notes on Orders
Leaving Notes On Orders

Where to note orders:

- Click on the Header (magnifying glass)
- Click on the texts tab

Types of notes: Double click on these to enter text

- **Form Header** –
  - These notes print on all the customer’s documents. DO NOT USE THIS TYPE OF NOTES UNLESS AUTHORIZED BY A SENIOR SALES REPRESENTATIVE.
• **Sales Order Internal** –
  
  o Use to communicate changes to orders, problems regarding the order, delivery issues, backorder items, notifications to the customer, etc. **If the note is regarding a change to the order or problem with the order you MUST include DETAILED notes. In addition, also note the customer’s name, contact information.**
  
  o ALWAYS BEGIN YOUR NOTES WITH THE DATE.
  o ALWAYS END THE NOTES WITH YOUR INITIALS.

• **Shipping Instruction** –
  
  o Use to communicate with the shipping department. These notes may include lot number requirements, shipping with another order, overnight order, etc.
  o ALWAYS END THE NOTES WITH YOUR INITIALS.
Leaving Permanent Notes on Orders

It is sometimes important to leave semi-permanent or permanent notes on orders to inform Sales Representatives of pertinent information regarding a specific customer’s account. This information may include:

- Cruz Credit Payment/Account Balance
- Certain items that the customer orders
- Accounting information
- Specific instructions for the customer

Transaction Code: **XD02**

1. Enter in the appropriate SOLD-TO account number (XXX##) >> Enter.
2. Click on “Sales Area Data”

3. Click on “Extras,” then “Texts”
4. Double click on Sales Order Internal Notes

5. Leave a complete and detailed note. Save the notes.
6. Save again

7. The next time the account is used to place an order, the note will appear once you enter the account information. NOTE: these messages can be deleted by following the same steps and saving changes.
Comp’s & Promotions
Coding Complimentary or Promotional Items in SAP

For reporting purposes, ALL comp/promo items MUST be coded correctly.

If a customer qualifies for a current promo, or is receiving a complimentary item, first enter in the appropriate catalog number (SC-######) or description.

- Double click on the line item. Select the “Conditions” tab.

- Click on the arrow under CnTy column. Double click on ZDSC – Customer Discount
• Under the amount column, type 100, to discount the product by 100% >> Enter. SAP will then reflect 100% discount.
• Click on “Order Data” Tab

• Purchase order type: Select the down arrow.
  o Sort alphabetically by clicking on the “Description” header
  o The two most common codes for promotional or comp items are MPRO (Promotional Item) or MCUS (Customer Satisfaction)
  o Select the code that best fits the reason you are comp’ing the item.
• Your Reference: Input your initials

- Go back into the main sales order menu. Go to “Conditions” tab to remove any shipping that may have been added (if customer qualifies for free shipping)
Common promotional items include:

- Re-usable shopping bag – horse: sc-364977
- Re-usable shopping bag – cow print: sc-364976
- Re-usable shopping bag – SCAH logo: sc-364978
- Santa Cruz Animal Health tumbler, purple: sc-395248
- San Juan Ranch tumbler, red: sc-395249
- UltraCruz Equine Wellness/Joint Sample: UCEQWJ
Canceling Orders
Cancelling Items on a Sales Order/Cancelling a Sales Order

If a customer calls to request a backordered item be removed from their order, or wants to cancel a specific item (or all items on a sales order) consider the following:

1. Check the sales order to be sure the item(s) has not already been shipped (if the item has been delivered, it will be shaded grey)

2. If the item is already in delivery, you must call the warehouse (Dallas or Paso) to see if the delivery can be reversed and the item caught before Fed-Ex leaves the facility.

3. Once you have confirmed that the item has not left the facility, continue to the following:
   a. Click next to the line item the customer is requesting to cancel. The item should be highlighted yellow to indicate your selection. You may highlight multiple line items at once.
   b. In the upper left hand corner, select “Edit” >> “Fast Change Of” >> “Reason For Rejection”
c. Provide a reason for the cancellation >> Execute.

d. Your screen will change to a grey color indicating that the reason for rejection has been changed.

e. Click on the magnifying glass >> Select the text tab >> Double click on sales order internal. You must leave notes indicating that the order (or item) has been cancelled, the date cancelled, the customer's name requesting the cancellation, along with their contact information and your initials.
f. Save the sales order.
Inventory
Using SAP Transaction Code MMBE (Stock Overview)

MMBE is our most accurate tool in SAP for determining inventory for a specific item. In addition, it informs of all lot/batch numbers available, their expiration and the quantity of each. It also provides store/warehouse locations for individual products.

You cannot execute a MMBE search without an appropriate catalog/SC number. If you do not have the SC number on hand, use AH Supply Report or the Santa Cruz Animal Health website (http://www.scbt.com/animal_health.html) to search for the product and get an accurate SC number. Copy and paste this SC number into MMBE to get inventory results.

- When checking inventory on an item, double click on MMBE.
• Material: enter the specific catalog number (SC-#####) on which you would like to check inventory or location. You may also choose to enter the plant (1000 for Paso, 1020 for Dallas). By leaving “Plant” blank, you will receive information for both the Paso and Dallas Warehouses. Execute.
• As seen below, sales representatives can now determine inventory for each warehouse (Paso Robles - 1000 or Dallas - 1020). Under each warehouse, available batch/lot numbers are listed, as is the amount of each batch/lot. MMBE also notifies of on-order stock, as seen to the right of the screen.

• To check the expiration date of a specific lot/batch number, right click on the batch
• Select “Display Batch”

• “Shelf Life Exp. Date” provides you with the expiration date of that particular lot/batch number associated with the product.
Order Searches
Executing Searches by PO Number

Can be used to look up an existing sales order by Purchase Order Number.

SAP Transaction Code: VA02

- Erase anything in the “Order” field. Enter the PO number provided by the customer in the “Purchase Order No.” field.

- Arrange results by date, double click on the appropriate order to enter it.
Executing Searches for Web Orders

SAP transaction code: ZWEB

After customers have placed an order on the website, they are provided with a web order confirmation number. This is different from the sales order number. Web order numbers begin with “6” and can be looked up in ZWEB.

• Input the web order number >> Execute

• The results show a sales order number, as well as the items on the order.
  o To go into the order in display mode, double click on the line item. Otherwise, open a new SAP screen and use VA02 to enter the appropriate sales order number.
• If the customer does not have a web order number and did not receive an email confirmation, it is possible the order did not get processed.
• If you are having trouble locating the web order, Amanda (x402) or Alisha (x406) have access to the web order database, and they might be able to provide you with a little more information regarding the order.
Creating New Accounts
Creating New Accounts

When a customer calls in and has never ordered from us before, a new account must be created.

First, ensure that the customer does not already have an account created by searching their last name/zip code, or possible ranch/hospital name.

If your search results come back negative, proceed to the following steps:

**SAP Transaction Code:** ZCUST – SCBT Customer Creation

Each account must have 3 components:

1. **SAP Umbrella Account:** begins with “ZUZQ” for individuals, or “ZUZC” for hospitals, ranches, companies, etc.
2. **SAP Sold-To Account:** Begins with “Q--“ for individuals, and “C--“ for hospitals, ranches, companies, etc.
3. **SAP Ship-To Account:** Same as sold-to, but ending in -001
   a. Customers can have multiple ship-to accounts for each sold-to account (ex: QXX-001, QXX-002, etc.)

To search for an open umbrella account, click the down arrow. Type the appropriate umbrella account (zuzq or zuzc) followed by two numbers (numbers depend on the progress of the umbrella accounts).
Select “No Restriction” >> Click on green check mark

Sort umbrella accounts chronologically (lowest to highest). The new umbrella account will be the next highest number in the set of numbers searched. (In this case, the new umbrella account will be ZUZQ4944)

Fill in the SAP Umbrella with the next consecutive umbrella available. The same number is entered in the Search Term. Fill in the customer’s name in the space provided.
Next, search for an available Sold-To account by clicking the arrow next to the “SAP sold to” field.

The sold-to account needs to begin with a “Q” (if individual) or “C” (if anything else), followed by the first two letters of the individual’s name (or ranch name, etc.)

If all sold-to accounts have been created (1-99) using that specific sold-to combination, use the next letter in line. (Example, as seen below, all QSA sold-to accounts are used. The next search term to be used then is “QSR”)

Search the new term in the same way, sort it in chronological order.
According to this search, the next account to be created is “QSR35”

All fields that are highlighted blue MUST be complete. The “Search Term” is the same as the “SAP sold to.”

Once you have filled in the address info, press **enter**. The system will automatically transfer information over to the ship-to.

Fields that need to be completed:

- Recon Acct = 121000
- HIT ENTER
- Acct Clerk = 50
- Sales District = 100000
- Sales Office = DL
- Delivery Plant: For CA, OR, WA, NV, HI, AK customers = 1000 (Paso Robles). For all other states = 1020
- Customer Group = 08 (or select most appropriate group. i.e. – feed store, livestock, etc.)
- Currency = USD
- Ship Conditions = SS
- Billing Pmt Term = NT30
- Account Group = 01
- ENTER
  - SAP will automatically fill in fields for the shipping information after you press enter.

For Ship-To information:
- SAP Ship-To will be the sold-to account number -001
- Search Term = Sold-To account number
- Name = If the customer will have multiple ship-to accounts, describe the type (Ex: Sarah Senff (walk-in) or John Doe (Taxable))
- Incoterm = FST
- Enter telephone number under “Additional Ship-To for Germany”
- Review information and save
Creating & Adding an Additional Ship-To Account

Additional ship-to accounts can be created for a variety of reasons. The most common occurrences for creating additional ship-to accounts include:

- Customer has filled out appropriate paperwork to qualify for tax-exempt status (CA, TX, ID)
- Customer has multiple destinations (different cities and/or states) in which they would like their products shipped to
- Walk in customers

SAP Transaction Code: XD01

Note: A sold-to and primary ship-to account must have already been created for a customer (via ZCUST or XD01) before adding an additional ship-to account.

- Select the type of account you would like to create: SCBT Ship-to
- Use the customer’s sold-to account number -### (In most cases, if this is the first additional ship-to account created, the ship-to account will end in -002). Click on the green check mark to proceed.
• Enter ship-to information
  o The name should in some way reflect why an additional ship-to account was created (ex: exempt, taxable, trainer, walk-in, etc.)
  o Search term should be customers SOLD TO account number
  o If it is a walk-in customer, the address should be 3600 Dry Creek Road, Paso Robles, CA 93446
  o Transportation Zone = 1
  o Click the expand button (see arrow below) to get appropriate Tax Jurisdiction
  o Enter phone and email information
  o Select appropriate Standard Communication Method
• Select Sales Area Data button

Create Customer: General Data

• Select the shipping tab
• Shipping Conditions = SS (standard shipping)
• Delivering Plant = 1000 for Paso Robles (CA, NV, OR, WA, HI, AK, Canada), 1020 for Dallas (all other states [HI, AK, Canada too])
• Uncheck the Order Combination box

Create Customer: Sales Area Data

• Next, click on the “Billing Documents” tab
• Incoterms = FST
• Under the “Tax” column, Germany = 0
• If ship-to party you are creating is EXEMPT, USA = 0. If the ship-to party is non-exempt, USA = 1
• Review information and save

TO LINK THE NEW SHIP-TO ACCOUNT TO EXISTING SOLD-TO:
SAP Transaction Code: XD02
• Enter the customer’s SOLD-TO account number. Click the green check mark.

• Click on the Partner Functions tab and add the new ship-to party. Add SH to the first “P” column and then input the new ship-to party name under “number” column. A complete Partner Functions tab will look like:

• Review information and save
CruzCredits
Creating Cruz Credit Accounts

“Cruz Credit” accounts are used most frequently for customers that call in to redeem their gift certificates that they won at a Santa Cruz Animal Health-sponsored event. Customers may have Cruz Credit for other various reasons as well. If the customer is using a gift certificate, it is important to first verify the gift certificate. Use the gift certificate database in AH Sales Contact (File Maker). Execute a find for the gift certificate number provided to you by the customer (AH####). Complete the entries as specified once the order is complete.

SAP Transaction Code: XDO1

Account group = SCBT Cruz Credit Account
Company Code = 1000
Sales Organization = 1000
Distribution Channel = 10
Division = 10

**Cruz Credit Accounts are created by combining AQ + First 3 letters of last name + first letter of first name + 3 numbers**
(Example: Virgil Valdez = AQVALV001)

Click on the green check mark on bottom left.

Complete fields: Name, Search Term, address information
Click on the [+] to expand the field to include the tax jurisdiction (see arrow above).

Enter appropriate tax jurisdiction.

Enter appropriate contact information.

Once appropriate fields have been completed, select the “Control Data” tab.
Complete the County Code (001) and City Code (0001)

Skip the “Payment Transactions” and “Marketing” tabs. Select the “Contact Person” tab

Fill in the information as completely as possible.
Select “Company Code Data” button

Complete the “Account Management” tab

Recon. Account = 121000

Select the “Payment Transactions” tab
Terms of payment = NT30
Select the “Correspondence” tab

Dunn.Procedure = 0001
Acctg Clerk = 38
Bank Statement = P

Once this tab is completed, select the “Sales Area Data” button.

Sales District = 10000
Sales Office = PR
SKIP SALES GROUP
Customer Group = 08
Currency = USD
Price Group = 01
Cust.pric.proc. = 1
Price List = 01
Cust.Stats.Grp = 1
Select the “Shipping” tab

Shipping Conditions = SS

Next, select the “Billing Documents” tab
Incoterms = FST
Terms of Payment = NT30
Acct assgmnt group = 01

Select the “Partner Functions” tab

Add the customer’s umbrella account. Enter.

Review information and save.

Once the account has been saved, email Melinda (peoplesm@scbt.com) asking her to add the specified amount to the CruzCredit account. You need to specify the CruzCredit account number, amount needing to be added, and the reason.

Example Email:

Hello Melinda,

Please add $50 to CruzCredit account number AQVALV001. This customer won a gift certificate at a horse show. Please let me know when this is complete so I can release the order. Thank you.

Once Melinda has emailed you back, you can complete the order. See “Applying Cruz Credits” for procedure.
Applying Cruz Credits

Once Melinda has notified you that she has applied the appropriate amount to the Cruz Credit account that you specified (see procedure, “Creating Cruz Credits”), you can now apply the credit to the sales order.

- Enter in the appropriate items the customer would like to order. Click on the Header

- Go to “Conditions” tab

- Click on the arrow in CnTy field for options. Select “ZURC” – Cruz Credit Payments
• Enter Cruz Credit payment amount, then hit enter.
  o If the order total is less than the Cruz Credit amount, only put the amount of the order total
  ▪ Example: Order total was $45 (Cruz Credit amount is $50). Cruz credit payment will be $45.

• Go to “Partners” tab to add the Cruz Credit account number
• Click the arrow in the partner field next to Cruz Credit account to search for the account number, or type the account number in manually. Enter.

• Click the back button to return to the main sales order screen. Review the order, un-block it, and save. The sales order number will appear on the bottom left corner of the screen.

• Orders MAY NOT be placed using the Cruz Credit account number as the Sold-To party and Ship-To party accounts. If this method is used, you will receive an incomplete order error and you will have to go back to process the order correctly.

• Open FileMaker Pro and go into AH Sales Contact
• Click on “Gift Certificates”

• Execute a find for the gift certificate number (AH####)
• Complete the redeemed section for that gift certificate.

NOTE: If the customer does not use all the credit on their Cruz Credit account, a pop-up note needs to be placed on the customers account so other sales representatives are aware of the credit when the customer places an order in the future. See the section, “Permanent Notes On Orders” for this procedure.
Quotes
Creating Quotes For Customers

This transaction is useful when customers request a quote for a certain product(s). Quotes can easily be converted to sales orders if the customer approves of the quote and would like to place the order.

SAP Transaction Code: VA21

Quotation Type = QT
Sales Organization = 1000
Distribution Channel = 10
Division = 10

Enter
Sold-To Party = Billing Account (XXX##)
Ship-To Party = Shipping Account (XXX##-001)

Enter all information as if it were a sales order. Save. Record the quote order number.
Converting a Quote to a Sales Order

SAP Transaction Code: VA22

Enter in the quotation order number or search for the Sold-To party. Go into the order.
Go to “Sales Document” >> “Create subsequent order”

Make sure your order type is “OR,” then click “Create with Reference”

Your quote number should show up in the quote-number field. Click “Copy”

- Select appropriate ship-to account
- Input all catalog numbers and quantities

Click on the “Sales” tab
Input the “Valid To” date

This date should be the current date you are creating the quote. Remember, pricing is subject to change at any time.

- If any notes need to be left, click on the header >> texts tab
- When done, SAVE.
- The quote number will appear in the bottom left corner of the screen,

Your quote has now been made into a sales order. You must confirm all the details of the order before releasing (billing information, shipping information, payment information, catalog numbers, quantities, etc.)

Once everything has been confirmed and the order is complete:
- Remove the delivery block
- Save
Running a Backorder Report

SAP Transaction Code: ZBKO

Purpose: This transaction generates a list of all Animal Health items that are currently on backorder. Animal Health products are divided into three material groups:

- General AH: V-OEM/VET
- RX items: V-OEM/RX
- UltraCruz Supplements: V-VET

A backorder report is run for each type.

- Erase everything under “Material Number”
- Plant = 1000
- Material Group: VOEM/VET
  - If you want to run a backorder report for all three material groups at once, click on the right arrow in the material
group section. To continue with just one variant, skip the following two steps.

- Add the other two variants >> Execute.
- When all three are added, there will be a green box next to the arrow.

**Back-order Report**

- Execute the report
- Sort by desired category
To go into specific orders, double click on the line item to enter the order in display mode. Or, open a new SAP screen >> VA02 >> Input sales order number

**If you’d like to export the report to spreadsheet form, continue to the following steps:

- Select Export >> Local File
- Select “Spreadsheet”
- Save the order to your desktop
Running a Sales Report

Sales reports are run as part of the “closing” procedure for the Paso Robles office. Daily reports are then submitted to John and Brenda for review.

Sales reports are also a useful tool to reference throughout the day. Sales reps can stay up to date regarding what customers have placed an order, what items have been ordered, etc. Sales reports can also be run for specific items, orders produced by specific sales representatives, reports for specific accounts, etc.

**SAP Transaction Code:** ZVA05R2 (or ZVA05R1 – used to quickly go in to sales orders)

- Type in the date (or date range) in which you would like to run the report. For nightly reports, you will use the previous day’s date as well as the current date.
  - Sales Document Type: OR to ZPOS
  - Remove everything under “Sales Office” (PR) and “Plant” (1000)
Material Group: V-OEM/VET, V-OEM/RX, V-VET

To get all three material groups, click on the yellow box to enter the other two material groups. Click Execute.

You can sort orders by Sold-To name, order number, material, etc. by clicking on the column and then selecting the pyramid. For end of the day reports, sort by sales order number (lowest->highest).
• For reports, click on the export icon, select “Local File,” then “Spreadsheet”

![Spreadsheet export icon](image1)

• Save the spreadsheet to your desktop. For end of the day reports being sent to John and Brenda, the sales report must be name, “AHSALESMMDDYY” (today’s date). Click Save.

![Save spreadsheet to desktop](image2)

• Click on “Generate”

Once the Excel Spreadsheet is on your desktop, double click to open it.

• **Highlight and delete:** row 1, column A, column B, column N

• Double click on B2 and type, “AH SALES MM/DD/YYYY”

• Highlight entire document and select all borders

• Under “cells,” click “format,” and select “AutoFit Column Width”

• Adjust column B

• Under “layout,” change “orientation” to “landscape”

• Scale document size to 60 or 50%
• Highlight all of the orders from the previous day, through the reported last order from the previous evening. Delete these (shift cells up).

• Highlight and delete all of the POS walk-in orders from the previous day (shift cells up).

• Sum up the adjusted number of items. Enter.

• File, Save As,

• Click “Save” and “Replace”
Senior Level Procedures
Releasing Credit Holds on Sales Orders

Some accounts are set at a specific credit limit (example: $500 credit limit per order). When this credit limit is exceeded, SAP generates a block so that the order cannot continue to be processed. The credit hold must be manually released. These kinds of holds often occur with walk-in customers when using VA01. An order confirmation cannot be printed until the following steps are completed:

SAP Transaction Code: VKM1

Credit control area = 1000
Credit account = customer’s sold-to account number
EXECUTE
Click the box to the left of the sales order number

<table>
<thead>
<tr>
<th>P.</th>
<th>Document</th>
<th>Do</th>
<th>Cred. a</th>
<th>Created on</th>
<th>Name 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>4754879</td>
<td>C</td>
<td>QSA98</td>
<td>05/15/2014</td>
<td>Sarah Senff</td>
<td></td>
</tr>
</tbody>
</table>

Click on the green flag

The line item will turn green

<table>
<thead>
<tr>
<th>P.</th>
<th>Document</th>
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<td></td>
</tr>
</tbody>
</table>

Press save

Your order will be released. Press the green back arrow to get back to the main SAP screen.
Click “Yes” to leave list and return to main SAP screen
Releasing Web Orders

In order to release Animal Health web orders, you must first receive authorization and permission from your manager.

Orders placed online through our website are imported into SAP and are automatically blocked “Animal Health” pending review from an authorized animal health representative. Web orders are imported throughout the day and therefore need to constantly be reviewed and released so they can be packaged and shipped.

• To release web orders, you can first run a sales report for the current day (or previous days, depending on time of day/day of the week).
• SAP transaction code: ZVA05R1 or ZVA05R2 **refer to “Running AH Sales Reports” procedure**

  ![Sales Order Query with Sold-to partner name](image)

• Execute the report
• Search for orders marked with an order reason of “Webstore” and delivery block of “Animal Health”

Sales Order Query with Sold-to partner name

<table>
<thead>
<tr>
<th>Sold-to</th>
<th>Sold-to Name</th>
<th>Order reason</th>
<th>Sales Doc.</th>
<th>Item Manual</th>
<th>Description</th>
<th>Description</th>
<th>M</th>
<th>Order Quantity</th>
<th>St.</th>
<th>Camp</th>
<th>Created on</th>
<th>DC Int.</th>
<th>Delivery Block</th>
</tr>
</thead>
<tbody>
<tr>
<td>1001</td>
<td>Amazon</td>
<td></td>
<td>000000</td>
<td>SC-125000</td>
<td>1250 mg 4mg/kg (saline KCl)</td>
<td>1250 mg 4mg/kg (saline KCl)</td>
<td>1250</td>
<td>1000</td>
<td>010101</td>
<td>12345</td>
<td>10/10/2023</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1002</td>
<td>Amazon</td>
<td></td>
<td>000000</td>
<td>SC-125000</td>
<td>1250 mg 4mg/kg (saline KCl)</td>
<td>1250 mg 4mg/kg (saline KCl)</td>
<td>1250</td>
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<td></td>
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<tr>
<td>1003</td>
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<td>1000</td>
<td>010101</td>
<td>12345</td>
<td>10/10/2023</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

• Go into VA02 – Change Sales Order

• Input blocked web sales order and enter the order to edit

• Remove the block

• Highlight the line items and execute an availability check for the products. If the item is available, click on the green check mark
  
  o If the item is unavailable at one location, change locations for that line item
  
  o If the item is unavailable at both locations, it is on backorder. You can check AH supply report for an ETA, or, if an ETA is not provided, email AH purchasing. Make sure to make appropriate notes in the internal text.

• Once you have ensured that all items are in stock and designated appropriate locations, click the magnifying glass and selected the “Conditions” tab.

• If appropriate, remove shipping.

• Select the “Partners” tab: verify sold-to and ship-to addresses. If addresses seem unusual, or if sold-to and ship-to addresses are different, contact Amanda (x402), Alisha (x406) to verify addresses in the web database.
Creating an Internal Sales Order

**In order to create Internal Sales orders you must receive authorization and permission from your manager**

Internal sales orders are created for items that are intended for use for show sponsorships, supplements for San Juan Ranch horse trainers, or anything else intended for use by or donation from the company.

SAP Transaction Code: VA01

- Sold-To Party: ZZZ99
- Ship-To Party: ZZZ99-002
  - If items are going to a location other than PR/Dallas, use the final destination ship-to account
    - Example: If items are going to a trainer, select their personal ship-to account
- PO Number: Use a name that describes the internal order (show, trainer, etc.)
• Enter the material number for the item
  o Codes for popular show items include:
    ▪ “TOTE” – for insulated cooler bag
    ▪ SC-395248 – SCAH Purple Coffee Tumbler
    ▪ SC-395249 – SJR Red Coffee Tumbler
    ▪ SC-364907 – SCAH grooming brush
    ▪ SC-395236 – SCAH face brush
    ▪ SC-364977 – Horse Head Shopping Bag
    ▪ SC-364976 – Cow Print Shopping Bag
    ▪ SC-364978 – SCAH Logo Shopping Bag
    ▪ UCEQWJ – UltraCruz Equine Wellness/Joint Sample

• Double click on the line item

• Click on “Conditions” tab
• Under CnTy column, select ZDSC. Discount 100% >> Enter

Click on “Order Data” tab
  o Purchase Order Type: TCOL (Collaborator)
  o Your Reference: Your initials

Go back, and click on the magnifying glass >> “Conditions” tab
  o Remove any shipping
• Click on “Texts” tab >> Sales Order Internal
  o Enter notes describing why you are creating this internal order

• Also include any shipping notes necessary

• Deliver & Post – Only if you are delivering or shipping the items yourself (make sure to include this in shipping notes). Do not
post if you want shipping personnel to send items. Remove all delivery blocks.
Retail VS. Wholesale Pharmacy

Retail: For customers residing in states in which we have a retail pharmacy license, we can ship directly to the customer’s (end-user’s) home address.

Wholesale: For states for which we do not yet have a retail pharmacy license, or that require a resident pharmacist, we must ship directly to a veterinarian or a vet hospital for the end-user then to pick up.

Retail Pharmacy States:

Customers residing in the following states can receive RX item via the retail pharmacy: (i.e. we can ship RX items directly to end-users)

• Alabama
• Alaska
• California
• Connecticut
• Colorado
• Delaware
• Hawaii
• Idaho
• Illinois
• Indiana
• Kansas
• Maine
• Massachusetts
• Michigan
• Minnesota
• Missouri
• Montana
• Nevada
• New Mexico
• New Hampshire
• New York
• North Dakota
• Ohio
• Oklahoma
• Pennsylvania
• Rhode island
• South Dakota
• Texas
• Utah
• Vermont
• Washington
• Washington DC
• West Virginia
• Wisconsin
• Wyoming
States That Require A Resident Pharmacist:
(We can never sell retail in these states, we CAN sell wholesale)

- Arizona
- Arkansas
- Florida
- Kentucky
- Louisiana
- Mississippi
- Nebraska
- North Carolina
- Oregon
- South Carolina
- Tennessee
- Virginia
Procedure for Wholesale RX Orders

The first step in determining whether the order will be wholesale vs. retail RX is asking the customer in what state do they currently reside. If a customer would like to place a RX order and resides in one of the states that require a resident pharmacist (Arizona, Arkansas, Florida, Kentucky, Louisiana, Mississippi, Nebraska, North Carolina, Oregon, South Carolina, Tennessee, Virginia) or a state in which we do not currently have a retail RX license, the following steps must be followed:
1. Check the stock availability of the RX item requested by the end-user. This can be done in AH Supply Report and in MMBE. (RX items can only be shipped out of the Paso Robles pharmacy).
2. Verify the billing and shipping address (For wholesale orders, the shipping address must be the end-users veterinarian or vet hospital).
3. Collect all data regarding the patient (name/species/sex)
4. Verify that the customer understands that the package will be shipped to their veterinarian/vet hospital for the end-user to then pick up.
5. Request all contact information for the end-user and the veterinarian/vet hospital. Accurate spelling of the veterinarian is required.
6. Ask if the customer knows their veterinarians state license number.
   a. If not, this information will be requested from the veterinarian/hospital/front desk.
7. After you have spoken with the end-user, add any internal notes into the order.

Wholesale Order Template:

**EXAMPLE**
Order Date: 1/29/14
Client Name: Krista Lapointe
Client Phone: 800-457-3801
Client Notes: adequan K-9 us for Brody, pancure suspension is for Flicka
Client Address: 1234 Sesame St, Paso Robles CA 93446
Patient I (name/species/sex): Brody / Canine / Male
Patient II (name/species/sex): Flicka / Equine / Mare
Vet name: Janelle Humphrey, DVM
Vet License #: 20035
Vet Phone: 425-485-8616
Vet License State: CA
Verification Date/Time:
Verification Person: Janelle Humphrey, DVM
Verification address: "verified address is correct".
Verification notes: Janelle will phone in prescription to Paul

For Wholesale Orders please make sure to note if you have already spoken with the vet’s office to verify shipment or if the Pharmacy needs to contact the Vet. **Should a Veterinarian need a written request be sent for a wholesale order, please use the WHOLESALE FAX FORM.** It is also important to fill out the client details and order number for later reference.

8. Call the veterinarian/vet hospital for which the package will be sent.
9. Verify that the package will be shipped to their location for the end-user to then pick up. Verify the shipping address.
10. Verify the veterinarians state license number
11. After all information has been verified, complete the Wholesale Order Template:
12. Complete internal notes informing that you have spoken with the vet office to verify shipment/license information.
13. Put an “RX Being Verified” block on the order and save.
PROCEDURE FOR RETAIL RX ORDERS

When taking down an RX order please make sure to ask these key questions first:

1. In which state do you currently reside?

   This informs us if we have to ship to a veterinarian's office on behalf of the client (wholesale) or if we can ship directly to the person's home (retail).

2. Are you a US licensed veterinarian or a client with a valid prescription?

3. Have you ordered from us before? If Yes, then ask them if they know their account number or Prescription RX ID#.

Make sure to complete every field in the order form. It is also extremely important to repeat back and to double check the spelling using words for letters such as: "A as in Alpha, B as in Beta, C as in Charlie."

Credit Card We accept VISA, Master Card and American Express. CC numbers should never be repeated by the AH rep as a company policy but if you are uncertain you wrote the number down correctly please ask the customer to repeat it. Please also get the complete name on the card, security code and expiration date.

PO#'s if the customer does not have a PO# their first name is used instead. All capital letters. Example: KRISTA

NET 30 - we will bill the customer **ok to process regardless of credit check per John & Brenda

Shipping Address: CANNOT SHIP to PO BOX, must be a physical address.

Catalog Number Any catalog number ending in RX (i.e. sc-363120RX; Previcox® Dog 57 mg, 60 ct) is a veterinary prescription item.
Make sure you repeat back the complete catalog number, description, and pricing. If you are new to taking orders in hard copy format it is recommended to 1st ask the customer for all the catalog numbers/descriptions.

- Ask the customer "Would you mind holding for a brief moment while I verify stock, pricing and shipping?"
- Use AH Supply Report and or another AH representative to check availability of Stock, complete description and price of the items, and how the items will be shipped (ex: ambient overnight $24.50, ground RX items are never sent ground, Blue Ice overnight $32.50 etc.) This is also a great time to tally of the total of the order and see if the customer qualifies for free shipping

**TAXES:** Please note that most customers living in CA, ID and TX will be billed for taxes unless they provide a tax-exempt form.

**Shipping Fees:** See the stipulations (attached from the web) on how to qualify for free shipping on prescription items below. NOTE it is different than the AH non-RX shipping policy. RX items are sent Fed-Ex overnight Mon-Thur. They can never be sent ground. On special occasions a customer can be quoted for Saturday delivery. This quote can be verified with Krista Lapointe xt 404, lapointek@scbt.com

**RX order Template: (example txt filled in)**

Order Date: 1/29/14  
Client Name: Krista Lapointe  
Client Phone: 800-457-3801  
Client Notes: adequan K-9 us for Brody, pancure suspension is for Flicka  
Client Address: 1234 Sesame St, Paso Robles CA 93446  
Patient I (name/species/sex): Brody / Canine / Male  
Patient II (name/species/sex): Flicka / Equine / Mare

Vet name: Janelle Humphrey, DVM  
Vet License #: 20035  
Vet Phone: 425-485-8616  
Vet License State: CA  
Verification Date/Time:  
Verification Person: Janelle Humphrey, DVM
Verification address: "verified address is correct".
Verification notes: Janelle will phone in prescription to Paul

**For Retail Pharmacy Orders** please make sure to note how the prescription is being handled i.e.: Fax form sent to the vet, Vet will call Paul, Paul needs to call the vet, Customer will mail the original. We currently hold 30 Retail / Mail Order Pharmacy licenses. This allows us to ship veterinary prescriptions directly to a client’s home: **Should a Veterinarian need a written prescription request be sent for a retail pharmacy order, please use the Prescription FAX FORM.** It is also important to fill out the client details and order number for later reference.
Point of Sale Procedure
-For Walk-In Use Only-

*Orders, Credits, Returns, ZPOS Booking, other reports*

-SAP Transaction Code: ZPOS (can only be used when logged into SAP under AH)

- ORDERS:
  - **Find the Sold-to Account:** If the customer’s account number is not known, utilize the search terms to help find the customer’s account information if they have one. Click inside the “Sold-to Party” box and click on the black arrow. This will bring up the search table. Be sure to utilize the asterisk (*) on either side of your search terms:

    - Hit Enter or click the green check mark at the bottom left of the search screen to see search results.
    - Select the appropriate Sold-to Account by double clicking the desired search term in the format CLL## or QLL## (no dashes).
    - For new customers, use the general Sold-To Account: **ZPOSSPR**
- **Enter the Ship-to Party Account:** Overwrite the ship-to account to one of the following:
  
  $ZPOSPR-001$ = taxable customers  
  $ZPOSPR-002$ = tax exempt customers  

  *When using the -002 tax-exempt ship-to account, make sure the customer has filled out a tax-exempt form.*

- Be Sure that ALL Fields populate! (Sold-To Phone and Sold-to email can be blank).

- **Enter PO for order:** customer name (in capital letters), unless otherwise requested by the customer.

- **Enter items and quantities** to be purchased by typing in the SC # of each item or using the bar code scanner located at the walk-in desk.

- **Add Payment:** Type the F6 button or click the “Add payment” tab.

- Select the appropriate payment method.
  
  *Credit Card: when you see this screen, use the credit card swipe to enter the customer’s information. If there are any issues with the swipe machine, click on the “manual card entry” tab to enter the customer’s card information.*
  
  *Hit enter or click the green check.*
*Cash: Make sure the total in the “Amount” box is the total the customer is giving you. The system will calculate the amount of change due. For example: if total due is $60.48 and customer pays $61.00, enter $61.00 and hit enter or click “Update” to see the amount of change due.
*Check: amount will automatically populate- enter check #.

*For Cruz Credit Payments: Perform a search to find the customer’s Cruz credit account number- similar to finding the customer’s sold-to account.

*It is also possible to select “Pay with Terms” for net30 customers. Simply check the box under the ship-to name. If invoices are to be mailed, print and mail yourself until further notice by Emerson. If the Sold-to email field is populated, the invoice will be emailed.
-To delete items, select the line to be deleted and click the Delete Item icon.

-To edit payment, select the payment line to be edited and click the Edit icon. To delete payment, select the payment line to be deleted and click the Delete Payment icon.

-MULTIPLE PAYMENT TYPES CAN BE ADDED. (For example- order total $100, customer can pay $45 cash, $55 credit card or any other combination).

-Save Order: Once payment has been settled, click the save icon at the top of the screen. This will automatically generate a receipt for the customer as well as deliver/post/invoice the order.

• CREDITS/RETURNS:
  -Use the sold-to account that matches the account used when the order was placed. Be sure to enter the Reference doc (which is the order number of the original order containing the item(s) being returned or credited. Complete the Comp code (this explains why the product is being returned or credited).

-Enter any notes that may be pertinent to the order by clicking the “Notes” tab at the top of the screen. Be sure to include your initials.
-Click the save icon. Once you see the note at the bottom of the screen indicating that the notes were saved, you can click the green, left facing arrow to return to the order.

-Select Payment type: Select the method of payment that the customer will be receiving the credit: if they paid with a credit card- always select credit card and a credit will be issued to the card used on the original order; if they paid with check or cash, try to give them cash back out of the drawer. If there is not enough cash- accounting will have to issue them a check and send it in the mail. Contact accounting for specific instructions regarding this if needed.
- Complete the credit/returns by following the additional procedures: fill out the form for Melinda (accounting aspect) and email Lauren (inventory aspect). See Walk-In Return/Credit Procedure document for these instructions.

- **ZOPSBooking**
  - Use this transaction (only available when signed into SAP as AH) to run reports for ZPOS transactions. These reports can be run for a single day or a range of days. The reports are used as an accounting document.

- **Adding ZPOS transactions to Reports:**

  For a report to recognize ZPOS transactions, ZPOS must be added as a search term under “Sales Document Type”.

  **Sales Order Query VA05**

  ![Sales Order Query VA05](image)

  **Report-specific selections**

  - Created On: 01/23/2014 to [Select]
  - Created by: [Select] to [Select]
  - Sales Document Type: OR to [Select]
  - Sold-to party: [Select] to [Select]
  - Sales Office: [Select] to [Select]
  - Plant: [Select] to [Select]
  - Product Hierarchy: [Select] to [Select]
  - Material Group: V-0EM/0BI to [Select]
  - DC Profile: [Select] to [Select]
  - Material Type: [Select] to [Select]
  - Material Number: [Select] to [Select]
  - Delivery block: [Select] to [Select]
  - Order reason: [Select] to [Select]

  **Output specification**

  - Layout: [Select]