

# Wholesale Sales

## Wholesale Sales Policies

Wholesale hours are Monday through Saturday.

Checks are permitted from wholesale customers at the agent's discretion. The agent is responsible for all monies collected as agreed in accordance with the agency contract. Checks must be printed with the name of the licensed permit holder. Do not accept starter checks or checks written in the manager or bartender's name. Call Agency Operations if you have a question about the status of a permit. Upon receipt of a check, write the permit holder's permit number in the upper left-hand corner of the check.

**Every wholesale invoice must be signed by the PERMIT HOLDER** or his authorized agent. If skeptical about the authorized purchaser, the agency personnel should verify the identification of the person presenting the permit identification card. If the person whose signature appears on the card is unable to act as the agent for the permit holder, the permit holder may give another qualified person written authorization. This additional written authorization shall be maintained in the permit holder's file.

**Under no circumstance is the permit holder or the agency's employees to use the permit holder's wholesale permit identification number to make purchases of liquor for personal or other use.**

If the order is being delivered, the person responsible for delivery will sign on the carrier line of the invoice. This includes contract delivery companies. The order must be paid in full (i.e. rung on the register as a wholesale purchase) before the merchandise leaves the agency premises. The agent may charge a fee for delivering wholesale orders. **Under no circumstance may retail orders be delivered.** At no time are all copies of the wholesale invoice to leave the Agency.

If the order is being picked up, the permit holder will pay the cashier and a copy of the invoice will be given to the permit holder as his receipt. A copy of the invoice must be in the permit holder's possession before the merchandise is removed from the Agency. A copy of the wholesale invoice must be kept in the in the agency for a minimum of six (6) years.

## Wholesale Delivery Fees

Set and manage the following:

- 1) Your Agency's standard delivery charges.
- 2) Specific charges for individual wholesale customers assigned to your store.

### Set Agency Delivery Charge

- 1) Select **Reports and Data** from the left navigation bar.
- 2) Under Customer Management, select **Delivery Charge**.
- 3) The **Set Agency Charge** box appears.

- 4) Type in the charge (in dollars and cents).

*Example of entering dollars and cents:*

Enter	Printed on Invoice
25	\$25.00
25.00	\$25.00
25.50	\$25.50

- 5) Select **Save**.

### Set an Individual Wholesale Customer Delivery Charge

- 1) Select **Reports and Data** from the left navigation bar.
- 2) Select **Customer Management**.
- 3) Select **Delivery Charge**.
- 4) Identify the desired **Wholesale Customer**.
- 5) Select the **Red Pencil** button on the far right the page.
- 6) Type the charge (in dollars and cents).
- 7) Select **Save**.  
**NOTE:** If you do not want to save changes, select **Close**.

### Set a Custom, One-Time Delivery Charge

- 1) When creating a wholesale order...
- 2) Select **Custom** from the **Delivery Charge Type** drop-down menu.
- 3) Type the charge (in dollars and cents) into the Delivery Charge Amount box.
- 4) The system will apply this charge after you finish the wholesale form and select the **Create Order** button.

## **Permit Holder Information**

The permit holder or his agent is required to present his Permit Holder Identification Card when a permit is newly issued. The Permit Holder's Identification Card must also be presented when an **ownership change** has occurred at the permit premises. This card will show the permit number, type of permit (A1A, D3, D4, D5, D7 or F2), expiration date, and the persons authorized to pick-up orders (including the name of the delivery person).

A copy of the permit holder's identification card may be kept on file with the permit holder's permission. In addition, a new person may purchase wholesale liquor for an existing permit holder if they present a letter of authorization from the permit holder at the time of purchase. This letter should include the name of the individual being added. Please note that permit numbers do change from time to time.

# **Wholesale Account Policies**

## **Acquiring New Wholesale Accounts**

If a new wholesale establishment is opening in your immediate area, you are allowed to approach this account in an effort to become their assigned liquor agent. The wholesale customer shall complete a transfer form, indicating that they are a new account, and the agent should then forward the form to Chief of Agency Operations.

## **Transferring Accounts from Another Outlet**

Agencies are forbidden to solicit another outlet's wholesale accounts for the purpose of transferring wholesale customers from one agency to another. If it is brought to the Division of Liquor Control's attention that an agent or someone representing the agent has solicited an account, the agent will be subject to possible termination of their agency contract. However, if a wholesale customer approaches an agent, the customer must complete a Request to Transfer form and mail/fax it to Chief of Agency Operations. If the request is approved, both outlets and the wholesale customer will be notified in writing.

The Agency will not sell to a wholesale customer until they have been notified of the transfer approval in writing. Agents selling to unauthorized accounts will not be paid commission for these sales, and will face potential termination of their agency contract.

# Wholesale Order Form

**Purpose:** This form is used to input wholesale customer orders, modify existing orders, and also to input wholesale customer returns.

**NOTE:** The order should be filled by one employee and checked by another, if a second employee is present, to be sure that the bottles on the filled order coincide with those ordered on the invoice. The completed form, which has been verified for accuracy, should be initialed by both employees.

You can create wholesale orders on behalf of your wholesale customers. The Agency Portal only allows for one open wholesale order for each permitted customer.

## There are three types of wholesale customers:

Types of Wholesale Customers	
Type of Customer	Description
<b>Assigned</b>	DOLC has assigned specific permitted wholesale customers to purchase spirituous liquor at wholesale price <b>exclusively from your agency</b> .
<b>Temporarily assigned</b>	DOLC has instructed a permitted wholesale customer to purchase spirituous liquor at wholesale price from your agency on a <b>one-time or short-term basis</b> .
<b>Unassigned</b>	<b>F-Class permit holders authorized to sell spirituous liquor</b> are not assigned to any specific agency and shall purchase at wholesale price from any agency authorized to sell wholesale.

Most of your wholesale customers have **Assigned** status.

## Wholesale Order Entry

- 1) Select **Wholesale Orders** from the left navigation bar.
- 2) Select **Create Order**.
- 3) From the drop down menu, select **Assigned Customer** or **Unassigned Customer**.  
**By default:** Assigned Customer is selected.
- 4) Select the desired **Permit Number** from the drop down menu.  
**NOTE:** If using **Unassigned Customer**, enter the required information.
- 5) Click **Continue** to move to next screen.
- 6) On the **Edit Order** screen, enter the **Brand Code**.

- 7) Tab to the **Quantity** field and enter quantity.  
**By default:** One bottle is populated.
- 8) Click on the **Add** button or **Tab** to the **Add** button and hit **Enter**.
- 9) Continue to enter all brands for the order.
- 10) To delete an item – select the **Red X** symbol at the end of the line.

### **To Add Items by Searching Brands**

- a) Select the **Search** button.
- b) Select a **Category** (if desired) from the Search Brands dialogue box.
- c) Select the **Search** button.
- d) **Highlight an item** on the results page by clicking on it once.
- e) Select the **OK** button.
- f) Enter a **Quantity** for the brand.
- g) Select **Add**.
- h) The system adds the item to the order.
- i) Repeat as necessary to add all desired items to the wholesale order.

**or**

### **Search for a Brand by Name**

- a) Select the **Name** field.
- b) Enter all or part of a brand name.
- c) Select the **Search** button.
- d) **Highlight an item** by clicking on it once.
- e) Select the **OK** button.
- f) Enter a **Quantity** for the brand.
- g) Select the **Add** button.

- h) The system adds the item to the order.
  - i) Repeat as necessary to add all desired items to the wholesale order
- 11) When complete or if you need to exit the wholesale order, select the **Save** button to save all changes.
  - 12) Once the save is complete, select **Next** to move to the **Finalize Order** screen.
  - 13) Select the desired **Mode of Delivery** from the drop down menu.
  - 14) Select **Delivery or Pickup**.

The table below explains the difference:

Mode	Description	Use Default Delivery Charge Option
Delivery	You will deliver the order to the customer.	Displayed
Pickup	The customer will pick up the order from your Agency.	Not Displayed

- 15) Select **Delivery Charge Type**.
  - By default:** Customer is selected.
  - The system displays the customer specific fee in Delivery Charge Amount (\$) box.
    - a. Select **Agency** from **Delivery Charge Type** to use your Agency's default delivery fee.
      - or**
      - Select **Custom** from **Delivery Charge Type** for a one-time custom delivery charge. The custom fee will **only be used** for this individual whole order.
- 16) To confirm delivery charge and order quantities, click on **Save**.
  - NOTE:** The **Print** icon is disabled until after **Save** is selected. This ensures the correct delivery charge shows on the printed invoice.
- 17) The screen displays all brands and quantities on the wholesale order, total bottles, total price minus any delivery charge, and any brand alert flags.

Alert Flag	Description
	This alert flag indicates that this item is either in a special order status or not a regularly stocked brand at your Agency. Verify enough stock is on-hand to fulfill the wholesale order.
	This alert flag indicates that current physical inventory level is below the quantity ordered. Verify enough stock is on-hand to fulfill the wholesale order.

- 18) To change any quantities, select the **Edit Order** button to return to the **Edit Order** screen.
- 19) To cancel the order completely, select the **Cancel** button.
- 20) To print the wholesale order, select the **Print** button.  
**NOTE:** The **Print** icon is disabled until after **Save** is selected. This ensures the correct delivery charge shows on the printed invoice.
- 21) To mark the wholesale order as sold, select the **Invoice Order** button.
- 22) To return to the wholesale order list, select the **Wholesale Orders** option from the left navigation bar.

## Updating an Open Wholesale Order

You can update any wholesale order that is in an **Open** status.

- 1) Determine the **Open** order you want to change from the **Wholesale Orders** list.
- 2) Select the **Blue Pencil** symbol to open the **Edit Order** screen.
- 3) To delete an item – select the **Red X** symbol at the end of the line.
- 4) To change the **Quantity**.  
Enter the brand code in the **Brand Code** field.  
Type the new quantity for the brand selected.
- 5) Select the **Add** button.
- 6) After all changes have been made, select the **Save** button.
- 7) Click the **Next** button to go to the **Finalize Order** screen.

## Deleting an Open Wholesale Order

You can delete any wholesale order that is in an **Open** status.

- 1) Select the **Open** order you want to delete from the **Wholesale Orders** list.
- 2) Select the **Red X** symbol to delete the order.

## Print a Wholesale Order

After you create or update a wholesale order, you can print an invoice to use as a pick list and receipt.

- 1) Determine the desired order from the **Wholesale Orders** list.
- 2) Select **Printer** symbol.
- 3) The system will create a PDF file you can view or print.

## Invoicing a Wholesale Order

After you collect the order payment, the wholesale order must be invoiced (or posted) in the Agency Portal.

**NOTE:** Prices for wholesale orders are “locked in” effective the date the order is created. Once “locked in” prices will not change with the new month’s pricing. The customer and Agent are **ONLY** responsible for this “locked in” price.

- 1) Determine the desired order from the **Wholesale Orders** list.
- 2) Select **Blue Pencil** symbol to view the **Edit Order** page.
- 3) Select the **Next** button to go to the **Finalize Order** screen.
- 4) Select the **Invoice Order** button.
  - The order status is now **Invoiced**.
- 5) Obtain proper signature on the invoices. Give one copy to the customer and file one copy in the Agency.

## Wholesale Returns

**NOTE:** This procedure will document the return of merchandise from a wholesale customer. This procedure is for returned saleable merchandise. If the merchandise is defective, use the **Inventory Adjustment** form for the returned merchandise.

- 1) Select **Wholesale Orders** from the left navigation bar.
- 2) Select **Create Order**.
- 3) From the drop down menu, select **Assigned Customer** or **Unassigned Customer**.  
**By default:** Assigned Customer is selected.
- 4) Select the desired **Permit Number** from the drop down menu.  
**NOTE:** If using **Unassigned Customer**, enter the required information.
- 5) Click **Continue** to move to next screen.
- 6) On the **Edit Order** screen, enter the **Brand Code**.
- 7) Tab to the **Quantity** field and enter quantity.  
**By default:** One bottle is populated.
- 8) Type the number of bottles to be returned as a negative.  
For Example: Enter -1 or -2.
- 9) Select the **Add** button.
- 10) Repeat as necessary to add all desired items to the wholesale order.
- 11) Finish creating the wholesale order using the **Wholesale Order Entry** steps.