

Line Item Statuses

Placed - When a quote is converted to an order, line item statuses are automatically marked as “placed”. This also indicates that the Order Management Specialist has not processed the order.

Non-Inventory - Inventory that is not tangible. Examples include: software, warranties, lift gate, green shipping, etc.

Pre-production - Some sort of service will need to be done, but we do not have the item yet. An example is if we are applying screen protectors to chromebooks, but we don't have the chromebooks yet. The actual screen protectors themselves and the service of applying the screen protector would both fall under “pre-production”.

Gather Info - The Order Management Specialist needs to get the information from the customer, i.e. white glove info, asset tag placement, etc

Validated - Status is changed to validated after “Gather Info” status is complete. This is changed after heat transfers are ordered, white glove info has been gathered, etc.

Need to Buy - We do not have this item in stock and need to buy it. This pushes the line item to the Purchaser's board to buy.

Waiting on Supplier to Ship - After the item has been bought, the status is changed to this. We are waiting on disty to ship out the item.

Non-Chromebook Back Order - Items that are on backorder, but not a chromebook. This is more for our product including carts, cases, etc.

On Hold - Orders that should not be worked on quite yet. Some examples can include waiting on an updated PO, customer wants a future delivery date, etc.

Waiting on Application - Customer needs to fill out New Customer Form. Order will not proceed until this is completed and the Finance Department has reviewed the paperwork.

Credit Review - Customer needs to prepay or we received their New Customer Form back and the Finance Department needs to review it.

Production Services - If any service will be done to that unit. I.e. white glove, laser etching, rewiring, etc. Marked when the order is ready or currently going through production.

Pick to Ship (PnS) - Item just needs to be picked from inventory and shipped out. No services performed on that item.

3rd Party Production - Items being manufactured overseas. Normally applies to when a customer wants embroidery or a container with custom items. Can also apply for when we need to send something to another business for them to complete. I.e. embroidery at a local company due to small quantities.

Canceled - When the customer no longer needs an item or if we need to source a different sku, we will cancel that line item and add the new sku. If an item is canceled, it will also be marked as "closed" in NetSuite.

Sales Order Status

(Similar to those mentioned above. Listing those not in the line item status list.)

Reserve - Customer isn't buying the units quite yet, but need to set them aside for that customer. Can only be used if they sign an LOI or if Ben approves the reserve order.

Pending Prepayment - Waiting on payment from the customer before proceeding with the order. Might be in this status if the customer needed an invoice before submitting payment or purchase order.

Production Transfer - Goes into this status before "Production Services". This allows the pick and ship team to pick the items needed for the production team to do the order. Once the items are picked, production changes status to "Production Services".

Fulfillment Statuses

This is found if you scroll to the right on the line items. Based on quantities. This will tell you if items were fully fulfilled or partially fulfilled (shipped).

Picked - Item is picked from inventory.

Packed - Items are wrapped up and ready to ship.

Fulfilled - Items have shipped.

Invoiced - Items have been invoiced after they have shipped. This might have a quantity listed before being fulfilled if there was a prepayment.

Location Statuses

Dropship - Items going straight from disty to the customer. Vivacity would not physically touch these items nor would they go into our inventory.

HQ or GVL Sales - Items brought into our inventory to sell. "HQ-Sales" means the item will come out of our sales inventory in Minnesota.

HQ or GVL Repair - Comes out of our RMA/Tech inventory. "GVL-Repair" means it will come out of Greenville's repair inventory.

Record Type Statuses

Sales Order - Order we will be making revenue on, a sale to the customer.

Demo - When we send units to the customer for free to try out. Most of the time, we do not get these demos back. Order will not have a list price. Only an internal cost.

Canceled - Customer no longer needs/want that particular product

Warranty Order - Used to fulfill warranty claims (i.e. zippers aren't working on 10 cases for a customer. We would then ship 10 cases to the customer). Order will not have a list price. Only an internal cost.

SWAG - Orders we send to customers as a thank you. Could include t-shirt, backpack, flyers, etc. Marketing order.

Donation - Orders that we are shipping to schools or businesses as a donation. Part of our PBC philanthropy.

Part Order - An order that only has parts.

eCommerce - Orders placed on our ecommerce website.

Customer Purchased Demo - Demo sent to customer that they will be keeping and we will be charging for. We go into the original demo order and update the record type from "demo" to this to keep all the original records intact (shipped date, tracking, etc).