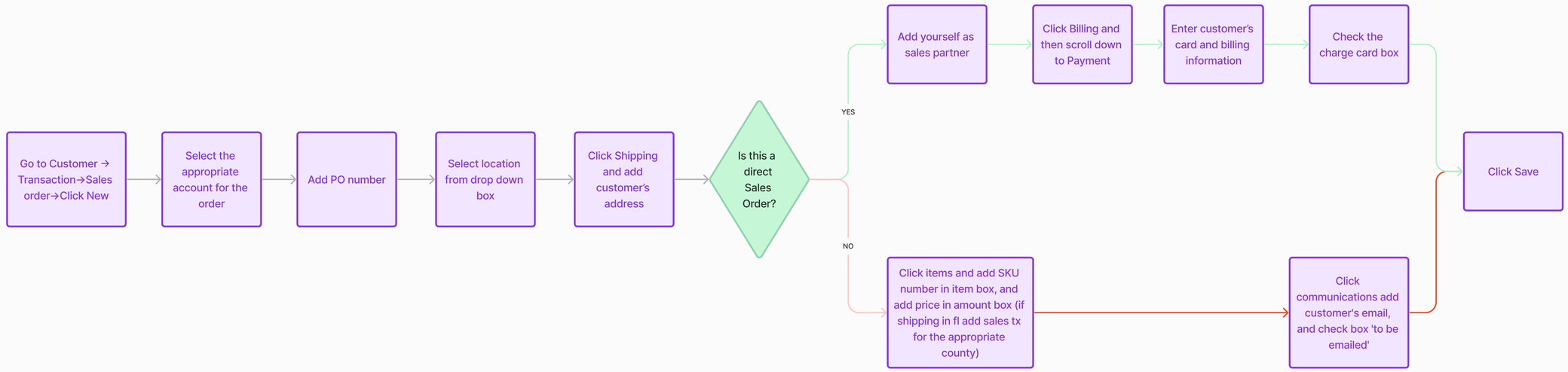
Flow chart


Go to Customer → Transaction→Sales order→Click New
Select the appropriate account for the order
Add PO number
Select location from drop down box
Click Shipping and add customer's address
Is this a direct Sales Order?
YES
Add yourself as sales partner
Click Billing and then scroll down to Payment
Enter customer's card and billing information
Check the charge card box
NO
Click items and add SKU number in item box, and add price in amount box (if shipping in fl add sales tx for the appropriate county)
Click communications add customer's email, and check box 'to be emailed'
Click Save