Special Orders – N

CUSTOMER
Hey, can you help me?
I'm looking for a specific grill. I'd really like to get it, but I couldn't find it… Any chance you could order it in?

ROBERT
Sure, let me see what I can do… hmm… it's not in our catalog I'm not sure I can get it…

ANDREW
Actually we can, let me help out!

Sometimes customers want something that isn't in our catalog. Fortunately, we can process it as a special order!

What were you looking for again?

ROBERT
Robert at screen: With Special Order Items, Eagle allows you to sell items you wouldn't normally have access to. You'll sell the item and take a deposit. Later when the product arrives for the customer you'll recall the Special Order and finish the process. Follow along to see the details by selecting a topic to get started!

Topics

- Creating Special Orders

- Completing Special Orders

- Recalling Special Orders

Creating Special Orders

Complete Special Orders through Point of Sale.

Begin by selecting SpOrd from the ribbon.

Note that Eagle changes the transaction header to Create Special Order.

Select Post or press the Enter Key to open a Customer Information window.

If you selected a customer, Eagle uses that account's information, otherwise it prompts you for Required customer information.

Depending on your setup, you can scan the back of a compatible driver's license to complete the field. Otherwise, enter the information manually.

Press OK.

Locate the item that you want to special order, and collect the following information: part number, description, price, and who you will buy it from.

Enter the Manufacturer's part number in the Item Field.

Since that number is not in your inventory, Eagle prompts you to special order the item. Choose Yes.

Eagle adds a new field to the Point of Sale window: N/S Sku. This is for non-stock items on special orders

Rather than being unique to an item, you'll have a special-order SKU for each department.

Enter the appropriate SKU.

Add the details for Quantity, Price, and Description.

Eagle automatically enters RSRV in the PO field. This stands for Reserve a Purchase Order, and triggers Eagle to generate a P.O. for your special-order item.

Once you complete entering details, press Enter to post the item.

The NIF tag stands for Not in File. This is for your information and tells you that the item is not in the inventory file. NIF will not print on invoices or receipts.

Add any other items as needed and total the transaction.

From here, continue to the Finish Special Order topic.

Completing Special Orders

After Totaling the transaction, Eagle shows you the Finish Special Order window.

Save the transaction. You can do so with or without printing.

After selecting a Save option, and depending on your security setting, Eagle prompts you for a deposit. Your system may be set up to automatically enter a value.

A best practice is to take a deposit for the full price of the item.

Press OK

Enter the payment and complete the transaction. Eagle prints a receipt or invoice depending on system settings.

It also assigns a document number to this transaction and adds the special order with the accompanying purchase order to the system.

Once you receive the product, contact the customer and recall the order.

Recalling Special Orders

When you receive the grill, notify the customer that they can pick up their item.

It's a best practice that you receive and finalize special orders via MPO and RRP before invoicing the POS special order.

Once the customer arrives for their item, recall the document number in POS. Use the dot look up feature by typing a period followed by the document number in the customer field.

If you do not have the document number, you can locate it using the Documents viewer. Open the Posting Menu and look under viewers for the Archived Documents option.

Once you load the special order, total the transaction.

Select Invoice this special order from the list. If you collected a full deposit when the customer placed the order, Eagle prints the receipt showing that the deposit changed to payment.

Special Orders enable you to meet your customers' needs even if it's for a product you don't normally stock.

About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software that is designed around the needs of our manufacturing, distribution, retail, and service industry customers. More than 40 years of experience with our customers' unique business processes and operational requirements is built into every solution—in the cloud, hosted, or on premises. With a deep understanding of your industry, Epicor solutions spur growth while managing complexity. The result is powerful solutions that free your resources so you can grow your business. For more information, connect with Epicor or visit www.epicor.com.

Corporate Office	Latin America and Caribbean	Europe, Middle East and Africa	Asia	Australia and New Zealand
804 Las Cimas Parkway	Blvd. Antonio L. Rodriguez #1882 Int. 104	No. 1 The Arena	238A Thomson Road #23-06	Suite 2 Level 8,
Austin, TX 78746	Plaza Central, Col. Santa Maria	Downshire Way	Novena Square Tower A	100 Pacific Highway
USA	Monterrey, Nuevo Leon, CP 64650	Bracknell, Berkshire RG12 1PU	Singapore 307684	North Sydney, NSW 2060
Toll Free: +1.888.448.2636	Mexico	United Kingdom	Singapore	Australia
Direct: +1.512.328.2300	Phone: +52.81.1551.7100	Phone: +44.1344.468468	Phone: +65.6333.8121	Phone: +61.2.9927.6200
Fax: +1.512.278.5590	Fax: +52.81.1551.7117	Fax: +44.1344.468010	Fax: +65.6333.8131	Fax: +61.2.9927.6298