Point of Sale Orders

Sometimes customers will call your store and ask if you have a particular item in stock.

If so, they may ask you to hold it for pickup sometime later that day, or perhaps within the next couple of days.

Your store may offer a service to deliver and install large items, such as patio furniture or gas grills.

One way to manage these types of transactions is to enter the stock items on an order.

An order transaction basically holds the inventory for the customer until they are ready to pick it up or have it delivered.

You will use an Order whenever you aren't shipping or invoicing immediately.

Creating orders in Point of Sale comes in very handy any time you need a little flexibility with a sale.

With orders, you can set the time for pick up or delivery, you can arrange for a deposit, and you can invoice customers when the purchase is complete.

In this course, we show at point-of-sale how to enter an order and how to maintain and invoice orders.

Topics

- Enter an Order
- Maintain and Invoice Order

Enter an Order

Orders that you enter at Point of Sale are much like any other sale transaction.

However, start by telling the system that this is an order rather than a sale.

You can do this by pressing Start Transaction and selecting Order, or by moving your cursor to the Customer field and pressing Order.

You'll need to collect customer contact information for the order, so move your cursor to the Customer field if it's not already there.

Then open the Header.

The Order Header Screen allows you to capture specific information about the customer, such as name, address, phone number, shipping instructions, and so on.

This is vital, especially when you're going to deliver the order.

If this is a delivered order, be sure to complete the Ship To address, any Special Instructions, and the Delivery date.

You'll also want to select the Ship Via link to complete the Shipping Instructions.

Once you've entered all the pertinent information, return to the Posting Screen.

Posting items on an order is just like posting items to a sale transaction. You can enter the SKU or manufacturer's part number by typing it or scanning the barcode..

When you finish entering items, total the transaction to open the Finish Order Menu.

The options here allow you to save the order transaction whether you print it or not.

After selecting the Save option that works best for you, Eagle prompts you to collect a deposit.

Type the deposit amount and press Enter to continue.

It's a good idea to record the document number for reference later.

Maintain and Invoice an Order at POS

To recall the order, if you know the customer's order number, you can use the dot lookup method on the Point of Sale screen.

Just type a period followed by the order number in the Customer field, and then press Enter.

Eagle recalls the order.

If you don't know the order number then put the cursor in the Customer field and open the Menu KPad.

Select Documents from the Viewers section.

Now you can enter the customer's account number and change the Type field to O for Order.

Select Display.

The viewer opens all orders placed for this customer.

Highlight the order that you want, then press Select to recall it. Now, the order opens on your Point of Sale screen.

You can toggle between the Order Header screen and the Item Posting Screen by clicking on Header and Post.

This makes it easy to confirm or verify customer address information and items that the customer ordered.

At this point, you can post more items or total the transaction in preparation for invoicing.

After totaling the transaction, the Finish Order menu opens, and you can invoice the order.

Tender the invoice like any other sales transaction.

Finish the transaction as you normally do.

As you can see, creating orders in Point of Sale is handy any time you need a little flexibility with a sale, especially when you have items that are not in stock or items that the customer wants delivered or will pick up later.

In this course, we showed how to enter an order and how to maintain and invoice orders at point of sale.

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.

EPICOR.

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