Special Order Streamline

Special Order Streamlining simplifies creating and tracking special orders in Point of Sale.

Objectives

- Item Entry Options
- Depositing Options
- Finalizing Special Options

Item Entry Options

From the *POS* screen, select *File.* Select *Configure* and then choose *Special Order.*

From the *Special-Order Setup* Pop-up, click *Item Entry Options.*

The first field specifies which SKU to use for not-in-file items. You can enter set values such as *SO* for special orders or you can leave the field blank to track special orders by the department.

The second field indicates the vendor you will use when ordering a non-file item. From the drop-down menu, select vendor. It is best practice to add your primary vendor here so that all special orders are directed to a single vendor.

In this field, you can choose whether pricing codes should be entered in the posting screen's price field. The best practice is to set this option to *Yes* to enable pricing codes to be entered in the Price field in *POS* posting.

In the *During item entry hide cost with asterisks* field, select *Yes* to enter a cost without the possibility of a customer seeing the item's cost when creating a special order.

Set the *Default P.O. Number to* field to *Reserve*.

Select how you want to assign the PO Number. If you select Automatically*: Using next available from option 101,* the system always automatically assigns the PO Number when generating the PO.

If you have vendors who insist on using a PO number they assign, you can set this option to one of the *Manually* settings so that the clerk is prompted and can enter that vendor's PO number in the *Reserve a purchase order* pop-up.

Once you have set all the Items Entry options, Click *Ok***.** In the confirmation pop-up, Click *Ok.*

Depositing Options

Let's set up the deposit options now. From the *Special-Order Setup* pop-up, select *Deposit Options.*

The *Calculate Deposits for* option determines which customers need to provide a deposit on special orders. The best practice is to set this option to *A* for All Customers and require a deposit for all special orders regardless of the customer.

The Calculate Deposits option controls how the system calculates the deposit amount. If you want to collect 100% of the item's price collecting the entire cost of the item up front, then select *100% deposit required* from the drop-down menu.
If you prefer a charging graduated deposit amount, select *% of total* and click the *% of Total* button to set the percentage of charge. For example, if you want to collect a 50% deposit, enter 50 here as the minimum deposit and click *Ok.*

Now for each special order, the system will automatically calculate the deposit as half of the total. The remainder of the cost will be collected from the customer later. Select the deposit payment method here.

Finally, click *Ok.*

Finalizing Special Options

To finalize your special order options, select *Finalize/Invoice Options.*

Select *Yes* from this drop-down menu if you want the customer's signature to finalize the special order. If you do not use a signature pad in your store, set this option to *No.* You can still collect a signature manually if needed.

Check the box accordingly in the *Select if changes affecting total allowed when 100% deposit* field. It is best to select all types because there are several scenarios in which you may have to refund a customer's deposit.

Set this option to *Y* so that the system will alert you if a POS clerk tries to invoice a special order that still has items outstanding on a PO.

In the *When total due is .00 complete invoice without stopping?* field, select *Yes* from the drop-down menu to invoice the special orders automatically.

After you've configured these options, click OK**.** A confirmation prompt will be displayed. Click *OK.*

To see an overview of the setup you just completed, from the *Special Order Setup* pop-up, select *Summary View. The table displays all the setup options.*

Recap

With some initial setup, you can now quickly and efficiently complete special orders, making your customers happy.

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