Advanced Special Orders provide you with several features to enhance your ability to create, [pause] order [pause], and track customer requests for non-stock merchandise.

For example you can: [pause]

Designate special order items that you want to be added to a Buyer's List.

From the Buyer's list, users can add items to the Inventory.

You can also place these items on purchase orders.

Special Orders also allow you to designate a will-call location so that items can be easily located when customers come in to pick them up.

You can configure your Eagle to allow checking the receipt status of special orders from the POS window.

On receipt of a purchase order, you can allocate these items to backorders [pause] or special orders and print receipt tickets for them.

And finally, you can maintain accurate cost of goods sold by setting your system to change the cost of items on special orders automatically if their cost updates during the receiving process.

We will review these functions in our lesson today beginning with the creation of a special order [pause].

We will then move on to discuss how these functions can be used during the purchasing phase of the process followed by the receiving phase.[pause]

Finally, we will finish the workflow cycle by completing the special order back in Point of Sale.

There are several options that should be reviewed on your Eagle system prior to utilizing the Advanced Special Order feature.

A full list of these can be found in the documentation for this ‘Training on Demand’ course.

Located in the ‘Course Detail’ portion of the ‘Course Catalog’, click on the ‘Course Materials’ link, [pause] here, to download the full list.

Be sure to watch the ‘Training on Demand’ course titled ‘Streamlined Special Orders’ before you continue with this module.

Creating a special order in POS begins by clicking the Special Order button.

Enter the correct customer information. For cash customers you may have your system set to require various fields be populated such as name, address and phone number.

The ‘Flexible Consumer Information’ settings that control what fields are required and which fields are optional, are covered in another ‘Training on Demand’ course.

Enter the sku, or dependent on how your system is set up, one may be generated for you.

Enter the correct cost, retail and description.

In this example we have set our system to add special order items to the ‘Buyers List’.

Total the transaction and take any required deposits.

Now that you have placed the special order for your customer, your purchasing department can order the merchandise.

The item entered at POS will now be available for viewing in the Buyers List.

From the Maintain Purchase Orders screen, or MPO, click the ‘Go To’ button [pause] and choose ‘Buyers List’.

For more information on creating a purchase order from this grid, watch the training on demand course called ‘Advanced Special Orders - PO Generation from the Buyers List’.

If your customer calls in looking for an update, you can check the receipt status of special orders from the POS window.

From the POS window, click Header. The Header screen displays.

Now Click Menu.

A dialog box opens.

Under the Viewers section, click ‘Documents’.

In the ‘Type’ box, select ‘S’ for Special Orders. You can enter more search criteria in any of the other boxes to narrow your search such as Customer, SKU, etc.

Press Enter or Display to populate the grid.

Click the appropriate special order, and then click ‘Display’ again.

The POS Open Document Detail viewer displays.

Check the ‘receipt information’ located at the bottom of the viewer.

[Receiving Functions]

Upon receiving a special order item, you can specify its will-call location so the cashier can more easily locate the item when the customer comes in to pick it up.

The will-call location displays in both the ‘Location’ field in POS, as well as in the POS Order Viewer.

When the merchandise arrives, begin the process of receiving the PO in the Purchasing and Receiving window, as you normally would.

Double-click on the item for which you want to specify a will-call location.

Now Click Misc.

Select "Set Will Call Location."

In the Location box, Enter the will-call location, and click OK.

Proceed with the receiving process, as you normally would.

When your purchasing clerk or manager receives this item in ‘Maintain Purchase Orders’ or MPO, [pause] they can update any cost changes found on the packing slip or invoice.

Dependent on your system settings, the cost can update automatically on the open special order transaction.

Then, when completed, the transaction will reflect an accurate profit margin and sales history will be correct.

Your system can also allocate receipts directly to backordered Special Order items.

For example, let’s say that item 123 was added to a Special Order and a Purchase Order was transmitted to the vendor.

• The vendor was unable to ship the item and it was placed on backorder.

• The PO you just received has item 123 on it.

• The system allocates item 123 to the open Special Order.

• If there are other Special Orders that also have item 123 on backorder, the system allocates receipts on transactions from oldest to newest.

When you finalize a purchase order with the Receiving Report or (RRP), include option P [pause] in addition to Option F.

Option P tells the system to allocate receipts.

The Receiving Report lists the order or special order to which any items have been allocated.

You can then set the item aside in your will-call location for the customer until he or she returns to your store to pick up the item.

If you set up your system to print a receipt ticket for allocated items,

You will see this message at the bottom of the ‘Update Options’ page.

Enter the appropriate receipt ticket printer number, here.

One benefit of printing a receipt ticket is that it functions as a pick list for the items that should be set aside for the customers who have ordered them.

These receipts may even be attached to the physical item so that employees can easily identify who the merchandise has been sold to and on which transaction.

When your customer comes in to complete the sale, you will simply display the special order in POS as you would with any other saved transaction.

You can locate the Special Order from the Viewer, and check the box to the left of the row.

Press the ‘Select’ button at the top of the ribbon menu, and the relevant information will populate your point of sale screen.

Complete the transaction so that both inventory and costs will be updated appropriately.

The Advanced Special Order features can be used to create a procedure in your store to accurately order, receive and sell items that you do not currently stock.

You can set your business apart from others by offering this service to your customers.

By utilizing the available Options Configurations settings and training your staff to adhere to a ‘best practice’ workflow, you can ensure that your data integrity is maintained.