Special Order Items Overview

Andrew

I got a notice that the Special Order I put in last week arrived … Can you remind me what to do next?

Robert

Okay. First, you should notify the customer that   it's ready… Lets review the whole process!

Pick a topic to get started!

Topics

- Special Order Process
- Special Order Products
- Entering Special Orders

Special Order Process

Steps of a Special Order

- Sales Order
- PO Sent
- Product Arrives
- Stock Receipt
- Customer Invoice

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BisTrack creates a Purchase Order for the Special Order products.

When the products arrive in inventory, a notification generates for the user who created the order.

The product may then be picked up or delivered, and the Invoice sent to the customer.

A Special Order transitions though five steps, beginning with a Sales Order, and ending with the customer invoice.

When you add the special order product, BisTrack assigns a unique product code and adds the S icon to the line.

Complete the order, and BisTrack automatically makes a Purchase Order.

This process is referred to as back-to-back processing.

The completed order displays a status of Waiting For Stock.

Depending on your system settings, your Purchase Manager may need to approve the Purchase order before BisTrack sends it.

When the Purchase Order is approved, the status changes to Incomplete.

When the product arrives, the Sales order's status changes to Picking.

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When receiving enters the Stock Receipt for the Special Order product, BisTrack messages the employee who created it.

The message gives details on the customer, products, and sales order.

Once the customer receives the product, the Sales Order moves to Invoicing for processing as usual.

Special Order Products

An administrator sets up Special Order products with no stock quantity, a cost of 0, and a sell price of 0.

You adjust these while adding it to an order.

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BisTrack assigns a prefix to the Product Code and a numbered suffix that makes a unique product code every time one is added to an order.

You use Base Products to create Special Order products.

A Best Practice is to have at least one Base Product set up for each major Product Group with product codes starting with the letters S O.

Examples could be for a door, lumber, or hardware products.

An administrator sets up a special order product with no stock quantity, and set sthe sell and cost price to zero.

You determine the sell and cost price while adding them to a sales or purchase order.

The Product code, Description, and Short description indicate that this is a Base Item for a Special Order.

On the Selling tab, the option Allow Specials based on this product shows yes, and Auto create specials from this item displays Purchase Order.

When you add a Special Order to Sales Order, BisTrack adds a prefix and suffix to the product code.

Your administrator determines the prefix in System Options.

BisTrack assigns the next available sequential number as a suffix to ensure that the product code is unique.

If you want to find a sales order, open the Find Products function, and enter the product code followed by an asterisk.

Make sure to enable Include Specials in options, and press go.

All special orders of that Base Item display in the viewer.

Entering Special Orders

When adding a Special Order to a Sales Order, remember to:

- Add to the description field
- Set the quantity
- Set the Selling Price

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Use the tabs and Product Information icon to add more other information.

When you complete the order, confirm the supplier for the product.

When creating Special Orders, begin by entering the base item in the Sales Order Quick Entry field.

On the Order Line Properties window, confirm the product code, and add a more specific description.

What you enter here makes it easier to search for the product later.

Set the quantity and selling price. Use the other tabs to change additional details as needed.

You can adjust other product information by selecting the Product Information icon, which opens Product Properties.

Select OK to add the line.

BisTrack assigns the Special Item icon, as well as an M icon to note that you manually priced this line.

Complete the order, and confirm the supplier.

Select Continue to process the Sales Order and issue a Purchase Order for the back-to-back processing.

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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