Using Special Order Items

Robert:
Sounds good. We'll give you a call when your doors are ready.
Andrew, have you entered a special order before?

Andrew:
I haven't, but that sounds important!

Robert:
A customer just ordered a set of custom doors, why don't I show you the process?

Andrew:
I'd appreciate that!
Select a topic to follow along.

Topics

- Using Special Order Items
- Find and View a Special-Order PO Related to a Sales Order
- Find Special Order Products

Using Special Order Items

To add a Special-Order Item to a Sales Order, type the base item code into the quick entry field and press Enter.

Modify the description to accurately describe the product.

This helps you find this specific item later if you ever need to reference it.

Adjust the Quantity and Selling price.

The Available stock and Total price update automatically.

You can enter additional details about the item by selecting the Product Properties button.

Use the other tabs to adjust specifics for the Order Line.

Press OK to finish adding the line to your order.

Note the prefix and the S icon indicate that this is a special item, while the M icon marks that you manually priced it.

Select Complete and review the details of the Back to Back Purchase Order.

The order uses the default supplier from the Special-Order Base Item.

You can choose a different supplier if available using the Alternative column.

Select Continue and complete the order as usual.

Find and View a Special-Order PO Related to a Sales Order

There are several ways you can locate a Purchase Order for a Sales Order.

The first is to use the Related Documents function.

Use Find Documents to locate the sales order.

Right-click the line and select Related Documents.

BisTrack displays any documents that are connected to that Sales Order.

Select the PO and choose Open to view it.

Another way to locate the purchase order is to use Find Work.

Set Look for to Purchase Orders for Receipt, where Our Ref. contains the sales order number.

Select Go.

Right click the PO and choose Open.

Note the Analysis Code field, and the link to the Sales Order.

The Lines tab shows the special-order product with the Quantity and Cost information.

You can still make adjustments that will update both the PO and related Sales Order information.

Double click the line, enter the information to change and press Ok.

BisTrack automatically records useful information on the Notes tab including the Sales Order Number, Created By details, and Date Required.

Select Complete Order.

Depending on your settings you can email or fax the Purchase Order to the supplier.

Follow the prompts to finish the process.

Find Special Order Products

Use Find Products to locate Special-Order items!

Over time, you may have a high volume of unique Special-Order items in your database, so BisTrack excludes them from the search by default.

To add them, open Options and enable Include Specials.

Use the search fields to enter the product information, and then choose Go.

BisTrack displays the Description, Sell Price, and Average Cost.

The viewer also shows Stock, Stock on Order, and Allocated Stock.

When you receive and deliver the product to the customer, BisTrack updates these numbers. By the end of the sales cycle, they will return to zero.

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