Advanced Special Order Set Up - N

It can be challenging to find the most efficient way to process customer requests for non-stock merchandise.

By configuring your system to align with Epicor Eagle Best Practices you can ensure that Special Orders are processed smoothly and end up with a satisfied customer.

In this course we will review the Point of Sale configuration settings for Item Entry, taking Deposits, and Special Order Invoicing.

We will also discuss the Summary View related to these settings.

To view the configuration settings for special orders, start begin in Point of Sale.

Select Tools, and click Configure Special Orders.

The Special Order Setup window appears with four options:

Item Entry Options, Deposit Options, Invoice/Finalize Options, and Summary View.

Select Item Entry Options.

Here, you can create a SKU to use for items not on file.

Best Practice is to use SO, for Special Order.

If this option is left blank, the clerk will need to manually enter the appropriate Special Order department SKU for each special order item.

You can enter the vendor you wish to appear for not in stock items.

Using your primary vendor prevents clerks from placing an order with the incorrect wholesaler.

The remaining fields need no adjustments.

Select OK to save the changes.

Deposit Options has a number of fields related to customer deposits.

Calculate Deposits For allows you to choose whether a deposit will be calculated for all customers or a just a specific type of customer.

Best practice is to select option A, calculate deposit for all customers.

Calculate Deposit asks how much of a deposit to collect at the time of the order.

You can charge the entire purchase price, a percentage, or nothing.

Best Practice is to collect 100% of the price of the item.

This maintains optimum inventory levels while still providing excellent customer service.

The final option determines whether customers can pay their deposit by bankcard or charge the amount to their account.

Select OK.

The final last set of options you can configure involve Finalizing or Invoicing Special Orders.

Determine whether customers are required to sign for a special order.

If your business does not use Signature Capture Pads select No.

Next, decide whether price changes can be made to any Order on which you have collected a 100% deposit.

Best practice is to allow for all options.

For Set Warn if Invoicing Item Hasn't Been Received, best practice is to select to Y.

This alerts the clerk that the item invoicing hasn't has not been received and stops them from invoicing the item order.

The final selection determines what occurs when the Total Due is zero.

Best Practice recommends selecting Y to avoid visiting the Totals screen.

Press 'OK', to update the settings.

Selecting Summary View provides a list separated by Option Group that shows the Current Value of each Special Order option.

The far right side of the viewer displays the corresponding Options ID numbers.

To close the Special Order Setup window select cancel.

You have seen several ways to set Item Entry, Deposit, and Finalize Options along with the Summary View.

Follow Epicor Eagle Best Practices for the most streamlined method.

Your clerks can now begin to process Special Orders and you can keep your inventory levels in check.

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