Advance Special Orders Overview Transcript

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

In this course, we will take a look at this process, talk about purchasing and receiving these products, notifying your customers, and finalizing the order.

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 control which fields are required and are covered in the 'Flexible Consumer Collection' Training on Demand course.

On Eagle Software Release 25.1 and higher, a Text Messaging purchase option is available.

The POS header screen displays the 'Phone' field as a hyperlink.

Click here to enter the customer's cell number and set 'Send Text?' to Yes.

They will receive a text message for each special order item on this transaction as it is finalized by the RRP report.

After selecting Special Order enter the SKU, locate an item from your Eagle Catalog or use the Quick Add feature to create one based on a template SKU.

Enter the correct cost, retail and description.

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

By using the Best Practice Eagle settings, a Purchase Order can automatically be generated for this Special Order item.

Your Purchasing Manager or Clerk can transmit the PO to the appropriate vendor.

Total the transaction and take the required deposit amount.

Best Practice is to require the full amount be paid before an item is special ordered.

If your customer calls in looking for an update, you can check the receipt status of their special order from Point of Sale.

Select Header from the Ribbon Menu.

Then click Menu.

Under the Viewers section, click 'Documents'.

In the 'Type' box, select 'S' for Special Orders.

You can also enter more search criteria in the other boxes to narrow your search.

Press Enter or Display to populate the grid.

Double-click the appropriate special order.

The POS Open Document Detail viewer displays.

You can then view the receipt information at the bottom of the viewer.

We see that our customer's item has not arrived yet.

Upon receiving a special order item, you can specify its will-call location.

Having a specified area in your business allows staff to easily locate merchandise when customers come in to pick it up.

Select Purchasing and Receiving from the Eagle Browser or type MPO in the launch bar.

Enter the PO number and press enter.

On the Ribbon Menu, select Receive and choose the Only option.

Double-click on the special order item.

You can update any cost change found on the packing slip or invoice if necessary.

Enter the quantity being Received.

Now Click Misc.

Select "Set Will Call Location."

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

On the top of the screen select the reports tab.

Then select Receipt Posting from the Ribbon Menu.

Your saved RRP report opens.

Your system can allocate receipts directly to Special Order items by using option P.

Eagle distributes the merchandise to the oldest transactions first.

You can print a Receipt Ticket too.

This can be attached to the Special Order Item for easy identification.

The Receiving Report indicates if a Text Message was sent.

You can then set the item aside in your will-call location and attach the Receipt Ticket.

When the customer comes in to complete the sale, display the special order in Point of Sale.

Locate it from the viewer or type in a period in the customer field followed by the order number.

Select Total from the Ribbon Menu or press the plus key.

If the customer has paid the full deposit, select Invoice this special order.

Advance Special Orders can help provide your customers with the items they want, even if they are not in stock.

By creating a Special Order, keeping abreast of its status, receiving it properly and finalizing the transaction you can keep inventory levels under control and still provide top notch customer service.

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