Advance Special Orders Options and Security Bits

The following is a list of several options and security bits that should be reviewed prior to using Advanced Special Orders in Epicor Eagle.

Options

ID	Subsystem	Description
16	POS	Gives the ablity to check the receipt status of special orders from the POS window.
51	POS	Determines whether or not you want the PO Number field in POS to default to "BUYER" for all special order items.
113	PURCHASING	Allows allocation of the receipt of merchandise to specific customer special orders.
114	PURCHASING	Determines if cost automatically updates on the POS document if it is changed during the receiving process.
115	PURCHASING	Determines whether a receipt ticket to prints when you assign items on a PO to backordered special orders.
116	PURCHASING	Determines what information prints on those receipt tickets.
133	POS	Set to YES in order to use the change Log.
1028	POS	Determines which Special Orders are allowoed at RPOS.
1460	POS	Any cost changes made on a purchase order can be automatically updated if option 1460 is set to Yes.
5447	POS	POS will check for sufficient quantity for stock items – those that have the field 'Keep Stock' set to 'Yes' in IMU.
5458	AOE	Set Option 5458 "Automatically place backorders on Buyer's List" to Yes.
5459	AOE	Use this option to determine which vendor is the default vendor when using the Buyer's List feature.
8451	POS	Determines how to use selling codes at Point of Sale.
8452	POS	Activates tooltips, which list codes you can use in the pricing field.
8457	POS	Creates default store groups for Quick Add of Non-Stock items in POS.
8716	POS	Allows you to create a three character prefix in the SKU to quickly identify items from trade-ins.
8717	POS	Applies to customers with Catalog installed in their system.
8718	POS	Allows SKU to be auto-generated for special order items added from Point of Sale.
8719	POS	Specifies the prefix used in Option 8718.
8720	POS	Provides a Special Order Template SKU for adding Not-In-File items from catalog.
9386	POS	Defaults the PO Number to "RSRV" by setting option to Yes.

Option 16

Option 16 should be set to 'Yes' so that you can check the receipt status of special orders from the POS window.
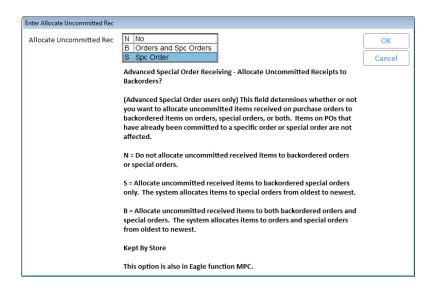
Option 51

Option 51 determines whether or not you want the PO Number field in POS to default to "BUYER" for all special order items. Please note that if you select Y, you will be unable to set a will-call location for the item.
Choose 'Y' if you always want special order items to appear on the buyer's list.
Choose 'N' if you don't want to use the Buyer's List feature.

Option 113

To allocate the receipt of merchandise to specific customer special orders, set option 113 to B or S.

Option 114

Option 114 determines if cost automatically updates on the POS document if it is changed during the receiving process. If items have been allocated on the RRP report (by the use of option P) and their cost was changed within MPO (Maintain Purchase Orders), then the cost will also be updated on the POS Order or Special Order. Best Practice recommends setting this to Yes.

Option 115

Option number 115 determines whether or not you want a receipt ticket to print when you assign items on a PO to backordered special orders.
Selecting option S will trigger the printing of a receipt ticket for items that are allocated to special orders.

Option 116

ID number 116 determines what information prints on those receipt tickets. This option only applies if you entered an S for option 115.

Option 133

Option 133 must be set to YES in order to use the change Log. If it is set to NO, contact your system administrator to change it.

Option 1028

Set Option 1028 Special Orders Allowed at RPOS to A.

Option 1460

Any cost changes made on a purchase order can be automatically updated if option 1460 is set to Yes.

This setting allows you to ensure the costs used in calculating profit margins on special orders is accurate. Best Practice recommends setting this to Yes.

Option 5447

When Option 5447, "Check Quantity Insufficient on Special Orders" is set to Y, POS will check for sufficient quantity for stock items – those that have the field 'Keep Stock' set to 'Yes' in IMU.

If the item's quantity available is enough to cover the quantity being posted to the Special Order, the system will leave the P.O. number in the posting area *blank* instead of setting it to 'Buyer' or 'RSRV'.

This way if the customer has some other items to purchase that are already in your inventory and on hand, the system won't place those items on a Purchase Order or on the Buyers List. Best Practice recommends setting this to Yes.

Option 5458

Set Option 5458 "Automatically place backorders on Buyer's List" to Yes.

Option 5459

Use this option to determine which vendor is the default vendor when using the Buyer's List feature.

Option 8451

Set Option 8451 to Yes in order to use selling codes at Point of Sale.

Option 8452

Option 8452 activates tooltips, which list codes you can use in the pricing field. These codes can assist clerks in remembering selling codes.

Option 8457

Option 8457 creates default store groups for Quick Add of Non-Stock items in POS.

Option 8716

Option 8716 allows you to create a three character prefix in the SKU to quickly identify items from trade-ins.

Option 8717

Option 8717 applies to customers with Catalog installed in their system.

There are two modes for adding Catalog items as non-stock items in your system which will be reviewed later in the course.

Option 8718

If Option 8718 is set to Yes, a SKU will be auto-generated for special order items added from Point of Sale.

Each auto-generated SKU has four parts-the prefix, specified in option 8719, the store, the transaction number, and the line number of the non-stock item.

If this option is set to NO, the system will use the manual item number you specify in the Add SKU window.

If you use the Epicor Eagle Catalog, you can set Option 8718 to C.

This enables the system to auto-generate non-stock item numbers for all special order items except those coming from the catalog.

Option 8719

Option 8719 specifies the prefix used in Option 8718.

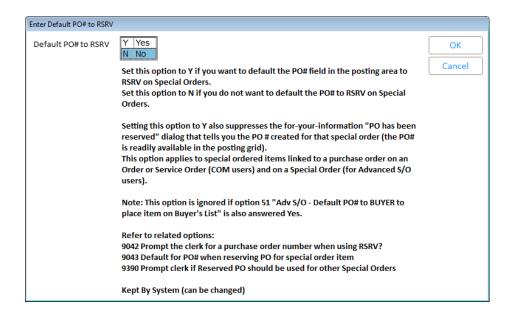Best practice is to use the letters SO, for Special Order.

Option 8720

Option 8720 provides a Special Order Template SKU for adding Not-In-File items from catalog.

Use this only if you want to use a different numbering scheme than that of the Catalog.

Option 9386

If your vendors do not require an assigned purchase order number you can default the PO Number to "RSRV" by setting option ID 9386 to Yes.

This option is ignored if option 51 is set to 'Yes' and you are using the Buyers List instead of directly placing special order items on a Purchase order.

Enter Default PO# to RSRV

Default PO# to RSRV | Y | Yes |
  | N | No |

OK

Cancel

Set this option to Y if you want to default the PO# field in the posting area to RSRV on Special Orders.
Set this option to N if you do not want to default the PO# to RSRV on Special Orders.

Setting this option to Y also suppresses the for-your-information "PO has been reserved" dialog that tells you the PO # created for that special order (the PO# is readily available in the posting grid).
This option applies to special ordered items linked to a purchase order on an Order or Service Order (COM users) and on a Special Order (for Advanced S/O users).

Note: This option is ignored if option 51 "Adv S/O - Default PO# to BUYER to place item on Buyer's List" is also answered Yes.

Refer to related options:
9042 Prompt the clerk for a purchase order number when using RSRV?
9043 Default for PO# when reserving PO for special order item
9390 Prompt clerk if Reserved PO should be used for other Special Orders

Kept By System (can be changed)

Security Bits

ID	Subsystem	Description
599	POS	Determines an employee's ability to add a special order item or Not-In-File SKU to a sale.
699	POS	Add Not-In-File- items to an estimate at Point of Sale.
700	POS	Allows employees to add a non-stock item to an order at Point of Sale.
815	POS	Allows employees to add special order items to inventory from Point of Sale.

Bit 599

Bit 599 determines an employee's ability to add a special order item or Not-In-File SKU to a sale.

Determine who this security bit should apply to based on your store's policy.

Bit 699

Employees who have been assigned Security bit 699 can add Not-In-File- items to an estimate at Point of Sale.

Bit 700

Security Bit 700 allows employees to add a non-stock item to an order at Point of Sale.

Bit 815

Bit 815 controls the ability of employees to add special order items to inventory from Point of Sale.

Set this to Yes for everyone allowed to add special order items in your inventory.

Keep in mind that if bit 600 is set to Yes, it takes precedence over this bit.

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