Advance Special Orders Buyers List Transcript

Running a large store with multiple vendors can make procuring special orders a little difficult. The Buyer's List allows you to have control over the purchasing process, and makes it easy to determine how to best source each special order item. We will explore the process for adding products to the Buyer's List and Adding those items to inventory if needed. We will also take a look at assigning an item on the Buyer's List to a Purchase Order.

You will need to review your Options settings prior to using the Buyers List. Details on these can be found in the Course Materials section of the Advanced Special Orders Workflow and Options course. Start a Special Order transaction in Point of Sale. Enter the item your customer would like to purchase. With Option ID 51 set to Yes, the P.O. # field defaults to BUYER. Press Enter and complete the Special Order as you normally would.

If your store adds items to the Buyer's List on a case-by-case basis, Options ID 51 will be set to No. From the drop down list, select BUYER in the PO# field. Press Enter to post the item. Select Comment from the Ribbon Menu to add any additional information about the special order. These comments will visible from the Buyer's List. Press OK and total the transaction as you normally would.

After adding items to the Buyer's List, you may need to add that merchandise to your regular Inventory file. To access the Buyer's List from the Eagle Browser, select the Purchasing and Receiving Folder and then choose Buyer's List. You can also type BUYER in Launch Bar or access the viewer from the Purchasing and Receiving screen.

Select Go To and then click Buyer's List. If the item on the Buyer's List is not in your inventory, you can add it. Highlight the item and select Add Inv from the Ribbon Menu. Add or change any pertinent information. Now click Add. Repeat for all remaining non-stock items.

Now that the items are on the Buyers List, you will need to assign them to specific Purchase Orders. If you will be ordering the merchandise from someone other than your primary vendor, click the Assign Vendor drop down list.

Select to correct supplier. If you want to add these items to an existing P.O. choose one from the Assign P.O. number box. Click the check box next to each item you want to add to the selected P.O.   When you are done, click the Assign button.

The new purchase order will now appear in the P.O. number column of the viewer. If you want to create a brand new P.O for the Buyer's List items, select RSRV, which stands for reserve, from the P.O. dropdown menu. As before, select the items you wish to be included and click Assign.

A dialog box will prompt you to specify the P.O. Number and alter the due date if needed. If your system is set up to automatically create P.O. numbers, leave the P.O. Number field blank. If you normally specify your own P.O. numbers, enter it here. Press OK.

If you add the wrong item to a Purchase Order, just highlight the item and click Unassign. Click Order to confirm ordering the selected items, in the assigned P.O., from the specified vendor. The Buyer's List items will be added to the corresponding P.O. The bottom of the screen will indicate that the item was placed on the assigned purchase order. The Buyer will transmit the order to the vendor through email or fax.

Adding items to the Buyers List in Point of Sale allows your purchasing manager to control where a product is ordered from. Managing inventory and assigning items to existing or new purchase orders gives your business control over costs and suppliers.

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