

Setting Up and Special Orders

You can create SKUs for items that you don't normally stock in your store. These products are identified as special-order items. They can be added to purchase orders and ultimately sold at point of sale. This course will demonstrate adding a special-order SKU and a special order template SKU. We will also look at setting up deposit parameters and adding alternate shipment methods. We will then add and invoice a special order in Point of Sale.

Objectives

- Adding Special Order Items
- Setting Up Deposits
- Configuring Shipping Methods
- Using Special Orders in POS

Adding Special Order Items

The first step to selling a special order product at POS is creating one followed by a couple of setup tasks. Special order SKUs are added like other products in the **Products** page. Click the **Add** button. And in the **Add New Product** page, select **Special Order** or **Special Order Template** from the **Type** drop-down menu. Choose **Special Order** to create a SKU for non-stock merchandise that you **do not** need to track by item number or monitor quantity-on-hand. For example, a customer wants to buy a table saw that you do not normally stock and you have no plans to stock. Enter a unique item number for the product and provide a good description. Determine the category from the drop-down menu. This is the department the item would be found in. Enter the desired gross profit percentage. Click **Save & Edit** or click **Save & Add More** to keep adding new special order items. Choose the **Special Order Template** type when you do need to track individual items. Let's create a template SKU called SOPowerTools. When added to an order, a unique SKU will be created that contains the template SKU, the order number and the line number on the order. It can be easily tracked back to the customer while keeping accurate on-hand quantities and costs and used for sales reporting. Best practice is to configure special order items and templates based on your business practices and the number of special orders you normally process.

Setting Up Deposits

You can configure deposits to charge customers a specified amount or percentage when they request a special order. From the main menu, select **Sales > Setup > Deposits**. Use the **Calculate deposit for orders for delivery** toggle to calculate the deposit amount for orders that are marked for delivery. **Calculate deposit for orders for Sourced via Purchase Order** allows you to calculate the deposit amount for orders that utilize a purchase order sent to your supplier. Note that at least one of these toggles needs to be switched on to add deposit ranges. If applicable, choose to calculate deposits for specific customer types. Tap **Add** in **Deposit Range Calculator** to add a deposit range. Enter the from and to amount for this deposit range in these fields. Now enter the minimum deposit percentage for this range. For example, if the deposit range is 1 to 100 and the minimum deposit percentage is 30, the customer will need to pay 30% of the total amount for special orders totaling up to 100 dollars. Tap **Save** to save the deposit range. Add additional ranges and percentages as needed.

Configuring Shipping Methods`

Configuring shipping methods determines how customers receive the special order items. Tap **Setup > Ship Via**. Tap **Add**. Enter a name and select a shipping method from this drop-down menu. Tap **Save**.

Using Special Order in POS

Once the setup is complete, you can use the special order items at POS. Select or add a customer and create an order. Use the search field to enter the special order item. Select how you plan to procure the item from the **Source** drop-down menu. Determine the shipping method for this order to the customer. Select the supplier and enter the supplier part number. If you want to add the item to an open purchase order for this supplier, choose from this drop-down menu. Provide a description and set the order quantity. Tap **Calculate Prices** to generate retail price based on the cost and desired gross profit percentage entered. You can also edit the retail, cost, and gross percentage values individually. Tap **Save**. The purchase order number and the shipping method display below the special order item. Use the search field to find the template. Fill in the required information in these fields just like we did for the special order item and describe the item ordered in the **Description** field. The template SKU, the order number, and the transaction line number display. Tap **Save**. Tap the highlighted part to view the sourcing information on the panel. Now, let's create a special order item using the special order template. The deposit due for the order displays here. Tap **Deposit Due** to update the deposit amount. Tap **Change Deposit**. Enter the new deposit amount and tap **Ok**. Tap **Make Payment**. Select the tender type and tap **Pay** to confirm the deposit payment. Receive the purchase order that contains the special order items in the **Purchasing** window. Check the box next to the purchase order and tap **Receiver**. Refer to the help articles, videos, and guided learning to learn more about receiving purchase orders.

In POS, search for the customer in the search field. Tap the **Receipt** icon and select **Order** to recall the transaction. The list of special order items displays here. The deposit paid appears here. Tap **Make Payment** to invoice and complete the transaction. Select the right arrow to view the recap.

Recap

Configure your settings to accommodate customer requests while maintaining best business practices. In this course, we demonstrated adding special order and special order template items. We set up deposits and shipping methods. We also created an order using the items in POS and invoiced it.

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