

Special Order System

When a customer requests an item(s) that you do not normally carry in-stock, an item(s) that you have never carried or you need to order a stock item(s) at a special price for a customer (perhaps with a one-time cost from the vendor), the special order system can simplify this process and eliminate the need for any kind of hand-written log or history of these requests.

This system lets you enter both new and existing items to be purchased from a specified vendor and sold to a specified customer. It will optionally create a Purchase Order automatically as well as a Sales Ticket at the appropriate time when prompted by the user. During the purchase order process, if an item(s) is new then it will be created automatically at this time.

The following is a step-by-step example of how this system works:

1. Type "SO" to access the menu and then 1. ENTER SPECIAL ORDER REQUESTS:

```
MANAGE SPECIAL ORDER ITEM REQUESTS                                     Page:
### ID      Cust # Name                                     Entered Needed Items 1st Item      Status
*** No Open Special Order Items Requests Found ***

Select #: A=Add New Request; R=Refresh; C=Display One Customer; L=Display All Customers; F1=Change Sort (Pg Up/Dn): R__
```

2. Enter "A" to add a new request:

```
MANAGE SPECIAL ORDER ITEM REQUESTS                                     Status:
Request ID: Adding...  Type of Customer: _
Customer:

Cust Contact:
Vendor:                                     Date Needed:

### Type      Item# Vend Stock #  Description      Size  Order Qty  Unit Cost Total Cost Status
Page:

Select: N=New Customer; E=Existing Customer
```

- a. You can select an existing customer or reference a new customer (the new customer will need to be added for the order can be billed).
- b. If you select "Existing Customer", you can purchase the item for "In-House Use" instead of for a retail customer.

- c. You will be required to enter an existing vendor that is already in the system as well as a date by which the special order item will be needed.

```

MANAGE SPECIAL ORDER ITEM REQUESTS

Request ID: 101      Type of Customer: New Customer      Status: Entered
Customer: SMITH, JOHN
Cust Contact: Phone: (479) 555-1212      Orig Cust Phone: (479) 555-1212

Vendor: 4      K & K VETERINARY SUPPLY, INC      Date Needed:
          TONTITOWN AR 72770

### Type      Item# Vend Stock #      Description      Size      Order Qty      Unit Cost Total Cost Status
*** No Special Order Items Found ***

# of Item; A=Add Item; P=Print Ord; F=Finish (opt to Create PO); B=Prepay; D=Delete; C=Chg Cust; V=Chg Vend; N=Chg Date Need: ____

```

- d. Notice the options at the bottom where you can do various edits to the order. Of note, you can “Prepay” for the item – this means you can create a sales ticket and accept the customer’s payment before the item is received from the vendor.

3. You will need to enter at least one item by typing “A” to add an item:

```

MANAGE SPECIAL ORDER ITEM REQUESTS

Request ID: 101      Type of Customer: New Customer      Status: Entered
Customer: SMITH, JOHN
Cust Contact: Phone: (479) 555-1212      Orig Cust Phone: (479) 555-1212

Cust      Add / Edit Item on Special Order Request      Status:
Item #: Adding...

1. Type: _      Master Bar Code:
2. Description:      Size:
3. Vndr Stk #:      10. Tax:
4. Alias 1:      11. Site Activation:
5. Alias 2:
6. Selling Prc:
7. Cost:
8. G/L Cat.:      21. Qty Ordered:
9. Vendor Unit:      Case Qty:      Weight:
Wareh. Unit:      Case Qty:      Weight:
Cust. Unit:      Weight:
Total Price:
Total Cost:

Select: N=New Item; E=Existing Inventory Item

```

- a. Notice that you can order an existing item or create an completely new item – if a new item, you will enter its description, size and other information here that will be used later to add it to the system.
- b. For both existing and new items, you must enter the selling price you quoted to the customer, the cost you expect to pay to the vendor and the quantity to be ordered. When entering the price and cost, the current system price and cost will be displayed for your review.

4. Once at least one item has been entered, your screen will look like this:

```

MANAGE SPECIAL ORDER ITEM REQUESTS

Request ID: 101      Type of Customer: New Customer      Status: Entered
Customer: SMITH, JOHN
Cust Contact: Phone: (479) 555-1212      Orig Cust Phone: (479) 555-1212

Vendor: 4      K & K VETERINARY SUPPLY, INC      Date Needed:
          TONTITOWN AR 72770

### Type      Item# Vend Stock #      Description      Size      Order Qty      Unit Cost Total Cost Status
1 Cur. Item 13998 22230      MOTOMCO RAMPAGE 15GM CHUNX      10 PACK      20 EAC      10.000      200.00 Enterd

Page: 1 of 1

# of Item; A=Add Item; P=Print Ord; F=Finish (opt to Create PO); B=Prepay; D=Delete; C=Chg Cust; V=Chg Vend; N=Chg Date Need: ____

```

Unless you are going to receive payment from the customer immediately (Prepay), you will now wait until the item is received from the vendor before completing the Special Order.

- Once the item is received from the vendor, return to the special order program (SO-1), and find the order in the list of orders displayed:

MANAGE SPECIAL ORDER ITEM REQUESTS

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###	ID	Cust #	Name	Entered	Needed	Items	1st Item	Status
1	101	*NEW*	SMITH, JOHN	08/18/13	09/01/13	1	13998 MOTOMCO RAMPAGE 15GM CHUNX 10 P	Entered
2	102	2643	SMITH, JOE	08/18/13	09/15/13	1	12113 WRANGLER BERMUDA 50#	Entered

Select #: A=Add New Request; R=Refresh; C=Display One Customer; L=Display All Customers; F1=Change Sort (Pg Up/Dn): R__

(in this example, number 1 in the list)

- Select the Special Order and then “F” to begin the process of finishing the order. Here, you will be prompted to decide about the purchase order:

MANAGE SPECIAL ORDER ITEM REQUESTS

Request ID: 101 Type of Customer: New Customer Status: Entered
 Customer: SMITH, JOHN Orig Cust Phone: (479) 555-1212
 Cust Contact: Phone: (479) 555-1212

Vendor: 4 K & K VETERIN Date Needed: 09/01/13
 TONTITOWN AR 72770

Create PO Query

1. Create Purchase Order Now
2. Create Purchase Order Later
3. Close Request w/No Purchase Order

Enter Choice: _

###	Type	Item#	Vend	Stock #	Order Qty	Unit Cost	Total Cost	Status
1	Cur. Item	13998	22230		20 EAC	10.000	200.00	Entered

Page: 1 of 1

- Most often, you will create the purchase order so that the item(s) can be received (#1 above) and then a sales ticket created. You will be able to edit the PO that is created, and most likely receive it immediately.
- After the PO is received, the Special will no longer be seen in “SO-1” but will now be listed as a “Billable” Order in “SO-2”:

SPECIAL ORDER ITEM BILLING

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###	ID	Cust #	Name	Entered	Needed	Items	1st Item	Status
1	101	*NEW*	SMITH, JOHN	08/18/13	09/01/13	1	13998 MOTOMCO RAMPAGE 15GM CHUNX 10 P	Completed

Select #: R=Refresh; C=Display One Customer; L=Display All Customers; F1=Change Sort (Pg Up/Dn): R__

9. Once selected for billing in “SO-2”, you will have the option to “Bill It” or delete it without billing:

```
SPECIAL ORDER ITEM BILLING

Request ID: 101      Type of Customer: New Customer      Status: Completed
Customer: SMITH, JOHN
Cust Contact: Phone: (479) 555-1212      Orig Cust Phone: (479) 555-1212

Vendor: 4      K & K VETERINARY SUPPLY, INC      Date Needed: 09/01/13
      TONTITOWN AR 72770

Page: 1 of 1
### Type      Item# Vend Stock #      Description      Size      Order Qty      Unit Cost Total Cost Status
1 Cur. Item 13998 22230      MOTOMCO RAMPAGE 15GM CHUNX      10 PACK      20 EAC      10.000      200.00 Complt

# of Item (view only); B=Bill It; D=Delete Billing: __
```

10. If “B” is selected, you will be taken directly into a sales ticket with the item(s) that were ordered. If the sales ticket is completed, the special order process is now complete.