Steps for Creating Special Purchase Order from Point of Sale Order

Overview

This document lists the steps for using the "Special Order Create" from a customer sales order. This procedure may be used by salespeople to create and print a special Purchase Order directly from a customer sales order.

A salesperson must have permission to create a special order. Refer to the second screen of the salesperson record.

> **Spec Order Create: _ (Y,N,P,R)**

Y – Salesperson has permission use the Special Order Create function to create a purchase order in "NEW" status. They will not have the option to Post and Print the PO.

N – Salesperson does not have permission to select 'P' for "sPec order" from the Action box when pressing F12 from the POS Line Item screen.

P – [This is the most commonly used option.] Salesperson has permission use the Special Order Create function to create a purchase order. They can optionally respond "Y" to "Post and Print" the purchase order and will then be prompted to fill out the dialog screen for "Post and Print P.O. Report" (just like when posting & printing a regular purchase order). This will put the Purchase Order in ORD status and print it to the selected printer number.

R – [This option is RARELY used.] Salesperson has permission to use the Special Order Create function to create a purchase order. They can optionally respond 'Y' to "Post and Print P.O." and also respond 'Y' to "Post Received P.O." If a 'Y' response is given to both, the dialog screen for the Post and Print P.O. will display followed by the dialog screen for the Post Received P.O. Report. If the salesperson posts the received PO, the Purchase Order will go to a CLS "closed" status.

Recommended:

Enter a P in the "Spec Order Create" field to give that salesperson permission to create a purchase order from Point of Sale:

> **Spec Order Create: P (Y,N,P,R)**

The remainder of this document assumes the salesperson has 'P' in the Spec Order Create field.

Steps for Creating Special Purchase Order from Point of Sale Order

Steps

1. Open a customer sales order as usual.

2. On the line items screen, type in the special order item and vendor code. Enter the room location, price and cost as needed. Press [F10] to sell it. When the message "INSUFFICIENT QAV" (quantity available) displays, respond with C to special order it. This places the quantity in the Bkord column. (The same holds true if B to backorder the item is chosen). If this is a not-on-file item (meaning it is an item that is not in your inventory file), be sure to enter the COST as well as the selling price.

3. To create a purchase order, press [F12] and P (sPec order). If you need to create a PO for more than one vendor, you will repeat the following steps for each vendor. If you wish to select all special ordered items on the point of sale order, press F7=SELECT ALL. Otherwise, highlight the item you wish to special order and press [ENTER]. A "Y" will display in the PO column to indicate "Yes" place it on a purchase order.   Use the arrow key to highlight the next item for the same vendor and press [ENTER]. Again, a "Y" will display in the PO column.

4. If you select an item in error, highlight the item and press ENTER. This removes the "Y" from PO column.

5. After all items have been selected for the first vendor, **press [F10] to order**.

6. A Purchase Order Create screen displays. (See next page.) Enter the vendor master code for this purchase order.

7. Press ENTER past the "Enter Purchase Order " prompt. The PO# will be system assigned.

8. Respond "N" to Change Ship Address, unless this will be a drop shipment. If a "Y" response is given, the program will prompt you for the shipping address. The shipping address will default to the "ship to" address on the point of sale order.

9. Respond "Y" to POST AND PRINT P.O. The cursor should skip over the "Post Received PO" field leaving it as N.   Respond "Y" to Ready to Begin.

```
            PURCHASE ORDER CREATE

   ENTER VENDOR MASTER:            _____
   _____
   ENTER PURCHASE ORDER:          _____
   _____
   CHANGE SHIP ADDRESS:        N (Y,N)

   POST AND PRINT P. O.:       Y (Y,N)
   POST RECEIVED P. O.:        N (Y,N)
   READY TO BEGIN:             _ (Y,N)
   BACKORDERS PROCESSED:          _____
```

Steps for Creating Special Purchase Order from Point of Sale Order

10. The Post and Print PO Report screen will display. See sample shown below. Fill in dialog
    screen as shown below.

```
       POST AND PRINT P.O. REPORT FOR MM/DD/YYYY

SPECIFY OUTPUT DEVICE _  (PRINTER OR $ = FILE)
SPECIFY OUTPUT ORDER  3  ( 1 = VENDOR ID, 2 = VENDOR NAME, 3 = ORDER NUMBER)

ENTER THE START NUMBER   1560   (Your PO# will display here.)
ENTER THE STOP  NUMBER   1560   (Your PO# will display here.)
ENTER CODE               ****

BLANK LINE BETWEEN LINES    N (Y OR N)
PRINT 80 COLUMN FORMAT      Y (Y OR N)
PRINT PACKAGE,COST OR NONE  C (P, C OR N)
PRINT PRICES                Y (Y OR N)
POST AND PRINT              Y (Y, N = RE-PRINT PO ONLY, OR P = POST ONLY)
PRINT BACKORDERS            N (Y OR N)

PRINT A RECEIVING REPORT    Y  (Y OR N) (Printing a Receiving Report in
                                         addition to printing a Purchase Order
                                         is optional.)
   PRINT ORDER QUANTITY     Y  (Y OR N)
   PRINT SCAN CODES         N  (Y OR N)
   PRINT JOB LABELS         N  (Y OR N)
```

11. If your order is less than a minimum required for free freight, you will get a warning
    message. Respond "Y" to continue. (Refer to sample below.)

```
WARNING!  Your order is less
 than the amount required for
 free freight.

 PO Number             1560
 PO Total            110.00
 Free Freight        200.00

 Continue?   Yes No Edit order
```

12. Your purchase order should have printed and can be faxed or "called in" to the vendor.

13. The cursor returns to the Backorder Purchasing for Point of Sale screen. See sample below.
    **If this is the ONLY special order you need to create, press [F12] and exit from the
    "Backorder Purchasing for Point of Sale" screen**. If you need to create a special
    purchase order for another vendor, repeat the steps.

Steps for Creating Special Purchase Order from Point of Sale Order

```
BACKORDER PURCHASING FOR POINT OF SALE
                                         P
LN# VC  ITEM                        QTY  O
  2 ABC SPECIAL ITEM-A                1
    TEST ONLY
  4 ABC SPECIAL ITEM-B                3
    TEST




   ___
F7=SELECT ALL  F8=DESEL ALL  F10=ORDER
```

14. After exiting from the "Backorder Purchasing for Point of Sale" screen, your cursor will return to the line items screen. Press TAB to go to the totals page of the order. Press Up Arrow key twice to move cursor to **Freight** field. Enter freight/shipping charges. Press ENTER twice to move cursor to Current Payment field. Take a payment as normal.   Use F4 key to print a sales order. NOTE: If you do not know the freight charges at this time, the charges can be entered at a later date.