

There are two ways special orders get into the system. One is from the parts POS module. The other is from a work order.

Parts POS Special Orders

Customer needs a part that you do not have. If the part is in the system, you can place the special order by clicking the Special Order tab and enter the part number. If they want another item not in stock, you can add it to the same SO invoice. You can add parts right from the POS screen. No need to go to the parts maintenance module. If the customer is buying in stock items to take home today, I suggest putting them on a separate sales ticket. Do not add the parts extra code for freight to this invoice. If you do, the system will SELL the freight today. You will add the actual freight when you SELL the part to the customer.

Take payment. If the item is coming from NTP and you know the price is correct, and there is no freight charge, then you can collect the exact amount of the sale as the deposit. If the part is coming from a source where the price is an estimate, or the freight is an estimate, then you should round the deposit up to a whole number. That way it is clear to the customer that they are leaving a DEPOSIT and they may owe more or less when the part arrives. Increase the deposit amount by the amount that you estimate the freight will be.

Example: Customer wants a new entry door. Jayco says the door will cost about \$300.00 plus freight and crate. Your past experience indicates freight and crate of an entry door from Jayco is about \$175.00. Tax is 7.75%. When you click the take payment, the system will indicate that you should collect \$322.50 for the door and tax. You should add the freight estimate of \$175.00 then round up to \$500.00 or even \$525.00. It is much easier to give the customer some money back then it is to collect more.

When you have created the SO and collected the deposit from the customer, the system adds a record to the Special Order File with a status of NO PO. If the item is coming from a distributor like NTP or Arrow, you should just add it to your daily stock order. If the item is coming from a manufacturer, place a PO for just that customer. To add a SO item to a PO, you just click on the Special Orders button after you have opened a PO for that vendor.

When the part is received, the system can be configured to send an email to the customer. It can also send an email to the PO author. When the customer comes in to pick up the part, you put the customer number into a point of sale invoice. The system will pop up a window that says special order parts have arrived and ask "do you want to sell them." Answer YES and the part or parts will be added to that sale. You can add any other parts the customer wants to buy on the same ticket. At this time you will add the Parts Extra for freight if freight is being collected from the customer. When you click accept payment, go to AR and you will see the DEPOSIT that the customer gave you when they ordered the part. The system will apply the deposit to this sale and let you know if you need to collect more money from the customer or if they owe you more money. Collect or refund using the normal payment process.

Once the sale is completed, the status of that SO becomes COMPLETE and that SO is no longer on your open SO list.

Work Order Special Orders

Tech requests a part that is not in stock. The parts person researches the parts and knows who they need to order it from and hopefully how much the part will cost. In the work order, go to the JOB, then PARTS. Make sure you are in required mode, not actual mode. Add the part to the system if you have not already done so. If you do not have a part number, you can let the system assign a part number and enter NPN as the vendor part number. When you get paperwork with the actual part number, go to the PO and the part record and replace the NPN with the actual parts number. (If you will need the actual part number for warranty purposes, you can include it in the description.) If you do not know the exact cost or any cost, don't worry, the system will update costs when the part is received. After you have added all the parts that are required for all the jobs on the work order, click the Special Order Tab. The system will prompt you to create a special order for parts that are not in stock. If the parts will come from a manufacturer, you will probably need to make a PO per VIN. If so, click on the Purchase Order tab and choose Parts PO. Add a new PO for each vendor that you added parts for. In the PO, put the customer number in the customer number field and click the Special Orders button. The system will load all open special orders for just the customer that you put in.

When the parts for a work order are received, the system can be configured to send an email to the work order author and/or the PO author. The customer can not be notified when work order SO parts are received. When you open the work order that the parts were ordered for, and click a job and parts, the system will pop up a window listing the SO parts that have arrived. Click the parts you are handing to a tech. The system will move them from required to actual.

If you close a work order with open special orders, the link will be broken and you will have to finish the special orders manually outside the system. If you anticipate a part will arrive in a few days, you are usually better off leaving the work order open until the parts arrive. The system works best if you leave all work orders open until all parts have arrived and are completed.

To help you keep track of special order items, use the Parts Needed screen in Parts -> Purchasing -> Manage Purchase Orders. Choose the Parts Manager Tab on the top row, then the Parts Needed Tab in the bottom section. To see just SO parts needed, click that option. To see On Hand Below Minimum also, click that option. Then click Select Parts

If you have to manually track a special order, you will have to cancel it in the SO file since the system will only be able to move it to a status of received. If there is no open work order to add it to, the system will not be able to change the status to completed. You should look at open special orders often so you know what is going on and where your potential problems are.