CHAPTER 3

Special Orders

If a customer wants an item that you don't have in stock, you may want to place a Special Order with a vendor who can supply the needed item or items.

With Special Orders there is a lot of information you need to track and organize. For example: all part information, including vendor, description, part number, quantity, etc.; all customer information, including name, address, phone number, etc. You have to track the part status: When was it ordered? Is it on backorder? How many were ordered? Is/are the part(s) here yet? How much does the customer owe? How much did he put down? Was it charged? How can you keep track of all this information easily? You guessed it—with COMPTRON®!

This chapter describes the next step in this process: *Special Order processing.* Since all the needed information about Special Orders is already in COMPTRON's data base from **Counter Operations**, you need only to follow the easy-to-understand instructions in this chapter to finalize the Special Order process.

Special Orders for customers can be entered into COMPTRON® through **Counter Operations**, using either the **< O> Order** option in the Parts Information part of the **Create Ticket** process, or the **< H> Hold Ticket** command later on *(see Chapter 1, pages 1-13, 1-15, and 1-19–1-20)*. Special Orders can also be placed through a Repair Order from the Service department.

The parts are ordered from the vendor through **Order Processing**. Receiving of the parts and customer notification is handled through **Order Receiving**. When a customer comes in to pick up the parts, get a refund, or make a deposit, use **Special Order Processing**.

Your quick and courteous responses to customers' special needs will result in repeat customer orders.

Special Order Processing Menu 3

Special Order pickups and additional deposits and refunds are easily handled using COMPTRON®. This chapter corresponds to **Option 3** on the **Parts Menu**: **Special Orders**. This program can also be accessed from **Counter Operations**, if your access level is 3 or greater. Select **3** from the **Parts Menu**, and this menu appears:

Special Order Processing Menu

```
Special Order Processing




                             Select

                               1.  All Types

                               2.  Counter Ticket

                               3.  Hold Ticket

                               4.  Repair Order

                               '   Exit


```

Explanation of Menu Options:

> **< 1> All Types** - Displays all special-ordered items, regardless of where the order originated.

> **< 2> Counter Ticket** - Displays items special ordered on a regular counter ticket.

> **< 3> Hold Ticket** - Displays items special ordered on a Hold ticket.

> **< 4> Repair Order** - Displays items special ordered on a Repair Order.

Choose the first menu option to list all types of pending Special Orders; or if you can determine how the order was originally placed, you may select the appropriate one of the remaining options to list just the orders of that type. No matter which of the four options you choose from the **Special Order Processing** menu, a name input screen similar to the following example will appear, with the cursor on the **Last Name** field:

Special Order Processing Name Input Screen

```
                              <'>  Exit

Special Order Processing - Counter Tickets




                      Last Name

                      First Name                 Initial


```

If you know the exact spelling of the customer's last name, type the complete last name and press *Enter*, and the cursor moves down to the **First Name** field. After you input the first name and initial, press ***Enter*** and the screen displays information on that customer's Special Order, including the status. If you don't know the exact spelling of the last name, enter a partial surname and leave the **First Name** and **Initial** fields blank.

To list ALL Special Orders in the category chosen, do not type a name, but just press *Enter*. You can get a partial list of Special Orders by typing only the first letter of the customer's last name. For example, by typing the letter K instead of a full name or Hold ticket number, you'll see Special Orders for last names beginning with the letter "K" through those starting with "Z". Below is an example of a **Special Order Processing** screen:

Special Order Processing Screen

```
< '      <'> Exit <N> Next <K> Pickup <R> Refund <D> Deposit <M> Memo <T> Toggle
Special Order Processing

Ln Phone Number Name           Description   Status   Ven  Number          Qty
 1     378-6448 KACENGA, DEBOR P/PROTECTOR K Its Here 009  015428            1
 2     378-6448 KACENGA, DEBOR 96 FORCE JRSY Its Here 009  017063            1
 3     378-6448 KACENGA, DEBOR 96 FORCE PANT Its Here 009  017192            1
 4     378-3500 KELLY, ED      L BELT        05/11/04 000  77105-268-222     1
 5     458-6755 LABRECQUE, MIK 6342 BULB 6V  Its Here 009  200009            1
 6     458-1833 MILLER, THOMAS SPOKE SET B9X Its Here 000  2061968          18
 7     378-4141 NATHAN, BRAD   LENS TURN SIG Its Here 000  33402-431-782     1
 8     459-1858 RAMAGE, JEREMY YAM MIRROR AD Its Here 009  600001            1
 9     458-9215 RANDALL, TONY  JS GRIPS LONG 05/11/04 004  W28001-112        1
10     459-2172 SANDERS, GEORG EXHAUST SHLD  05/08/04 002  65634-81C         1
11     458-2362 SILVERS, PHIL  AIR FILTER EL 05/12/04 020  3400              2
12 314-946-2049 TRAVERS, PAUL  HEADSET J&M   05/08/04 026  HS134BJHSFF       1
13     459-6073 VERACRUZ, SAL  CHAIN CAM100L Its Here 000  14401-958-003     1
14     378-2951 WILLIAMS, TED  CASE-STORAGE  Back-Ord 004  39012-3710        3
15     458-8145 WOOLGRANGE, R  COVER,CAMSHFT Back-Ord 004  14025-1974        1
16     459-1617 ZABRISKI, ED   WINDSHIELD    Cancel   014  070197            1
```

Explanation of Screen Command Options:

< **'>** **Exit** - To exit this screen and return to the **Parts Menu**, type '.

< **N>** **Next** - If the screen is full, type N to display the next screen.

< **K>** **Pickup** - Type K if the customer is picking up all received items.

< **R>** **Refund** - Type R if the customer wants a refund on all or part of the money paid on the item(s).

< **D>** **Deposit** - Type D if the customer wants to make an additional payment on the item(s) ordered.

< **M>** **Memo** - Lets you add a note (Memo page) to a Special Order record, such as arrival date notes, special shipping information, backorder status, authorization numbers, etc. If a Special Order record has a Memo page, the < **M>** option on the menu bar at the top of the screen will flash, alerting you to check that Memo for notes. You can also edit the Memo page. To see a **Help** screen, use the *F2* key.

NOTE: A Memo page will stay with the record to which it is attached, as long as that record stays in the system. Deleting a record will also delete the Memo attached to it.

< T> **Toggle** - Enables you to go directly from this screen to a particular Special Order record to see more information about the order (and edit it as needed), and then return here.

Field Descriptions:

Ln - Line number assigned by COMPTRON®.

Phone Number - Customer's telephone number.

Name - Customer's last name, followed by a comma, then the first name.

Description - Description of the ordered part.

Status - Indicates whether the part has been received in stock. Only items with "It's Here" status can be picked up. If the item(s) is(are) not placed on a Repair Order, this indicates the date the customer requested the part to be ordered.

NOTE: *The date a customer requests a part to be ordered is not necessarily the date when the part is actually ordered by your business.*

Ven - Vendor number of the ordered part.

Number - Either the part number or code of the item, depending on the one entered when placing the Special Order.

Qty - Quantity of parts ordered for that particular part number.

Special Order Pickup

If the customer's name doesn't appear on the screen, type `N`. Type `P` to pick up items. You will be able to pick up only those items marked "It's Here" in the **Status** column. Type the line number that corresponds to the customer picking up the item(s), and press *Enter*.

All items ordered **ON THE SAME TICKET** that show "It's Here" in the **Status** column are picked up. "It's Here" means that a purchase order was printed and received using COMPTRON®. *(Refer to Chapter 6, Order Receiving.)*

If the information is correct, press *Enter* to **Continue**. If the information is **NOT** correct, type ' to **Exit** and try again.

If there is money due on the ticket, COMPTRON® asks for the remaining balance and shows the amount of change. The following message is displayed:

```
    Print all orders on ticket Y or N
```

If you type `Y`, a ticket is printed.

If the **Status** column shows that some of the items are in and some are marked "Back-Ord," "Re-Ord," "X-Ship" (cross-shipped), or "Cancel," the customer will only be able to pick up and pay for items marked "It's Here."

NOTE: *For charge accounts, any special-ordered item(s) are **NOT CHARGED** to the customer s account until they have been **RECEIVED AND PICKED UP**.*

Special Order Deposits

COMPTRON® allows customers to make deposits on special-ordered items.

From the **Special Order Processing** screen, type D for **D**eposit, then the line number of the Special Order to which the deposit applies, and press *Enter*.

If it is a Hold ticket or an account ticket, you will not be able place a deposit on the Special Order. *(Refer to Chapter 1, Counter Operations, and read the Create Hold Ticket section.)*

If the information is correct, press *Enter* to **Continue**. If the information is **NOT** correct, type ′ to exit and try again. The screen displays the amount due. This shows the entire ticket balance for the Special Orders, including *reordered*, *backordered*, and *cross-shipped* items. Type in the amount the customer wants to pay toward the Special Order.

The screen shows the amount keyed in. Make sure the correct amount is typed. The cash drawer opens***** (optional), and a ticket is printed showing the transaction. If you type ′ (**Exit**), the transaction is ignored and COMPTRON® returns to the **Parts Menu**.

If a line number is typed that is ordered on account, you will see this message:

```
*** No Deposit On Account ***
```

If a line number is typed that is canceled or prepaid, the message is:

```
*** Nothing To Credit ***
```

Special Order Refunds

COMPTRON® allows businesses to refund customers the amount paid on Special Orders **ONLY UP TO THE AMOUNT OF THE DEPOSIT**.

At the **Special Order Processing** screen, select **< R>** for **R**efund, then type the line number of the Special Order to which the refund applies.

The screen shows the "Amount to Pay." Enter that amount. Make sure that you have typed the correct amount and press *Enter*. The cash drawer opens ***(optional),** and a ticket is printed showing the transaction. If you type ′ to exit, the transaction will be ignored and you will return to the **Parts Menu**.

If the item is on account, you will get this message:

```
***No Refund On Account ***
```

If the item is on a Hold ticket, the message is:

```
***No Refund On Hold Tickets ***
```

If no deposit was previously paid, the message is:

```
*** Nothing To Refund ***
```

* The cash drawer opens only if money needs to change hands.

Hold Ticket Special Orders

A Special Order may have been submitted for the customer through the **Hold Ticket** function of **Counter Operations** *(see Chapter 1, pages 1-14 and 1-19).* A Hold ticket is built over time, kept in suspense so that parts can be added (or taken off) gradually, until the ticket is complete. Then the Hold ticket is ended. This is a way to keep track of parts sent to the Service department. If a part is not in stock, you can Special Order it on a Hold ticket.

With COMPTRON®, you are able to take a *deposit* on a Hold ticket. If you want to place a deposit on a Hold ticket: at **VN** (vendor), type 95. You will see the words Deposit Hold in the **Part Number** field. Type the description and the amount of the deposit. When the ticket is placed on Hold, a ticket is printed showing the deposit collected.

You may also give a *refund* on a Hold ticket. This works exactly the same way, except use **VN** 96.

Repair Order Special Orders

A Special Order may have been placed from a Repair Order in the Service department. This is done through the **Repair Order Parts** screen, which functions much like the **Create Ticket** screen in Parts **Counter Operations**. If a part needed for a repair job shows "N" in the **Ty**(pe) field, that means the part is not in stock. When the Repair Order is edited, the operator will be asked whether to order the part; typing a Y answer will cause COMPTRON® to special order it.

To check on the Special Order from Counter Operations, use **Option 3**, **Repair Order**, from the **Special Order Processing** menu. From the Service department, the operator could check the order status with the **< O> Orders** option from the **Repair Order Parts** screen.

Summary

This chapter described:

> Special Order pickup

> Special Order refunds

> Special Order deposits

> Special Orders on Hold tickets and Repair Orders