

SPECIAL ORDERS

Placing the Order within a Cash Sale

You can mix stock items with non-stock items in single orders.

1. Click on Order Processing icon on front page
2. Input "c" into Order number field
3. Click on Customer order no field and input **Customer name AND Phone No**
(this will allow you to find the NS again when you want to sell it)
4. Input "NS0001" in SKU field and press ENTER
5. Input accurate description of the NS here: in the format of "SUPPLIER NAME" & "PART NUMBER"
6. Input quantity in the Quantity field
7. **Click on Text icon**
8. **Enter the following data in the Internal Text Box (by clicking on the small box under the heading T next to the description)**
First Line enter K xxxxxx (where xxxxxx is the sales order number at the top of the screen)
Second Line enter Customer Number and phone no
Third Line enter deposit taken
Fourth Line enter sales price if known
Fifth Line enter supplier cost price and part no if known
9. In the pop-up tab down to Price Base field and select S Separate Price from drop down
10. Tab to Base Price field and enter
 - a. The vat-inclusive price you want to sell the product at
 - b. Zero if you do not know how much to charge
11. Ignore the other fields in this pop-up and press RETURN / click on OK
12. Ignore the Free of Charge pop-up by selecting "Yes"
13. Enter 20 into Source field and press ENTER twice (the status must be set to IBT)
14. Add further stock lines or non-stock lines as required
15. Click on Process icon in grey header panel
16. Check that Action field is set to "Action Back to Backs"
17. Input customer's phone number, name, address and post code in relevant fields
18. Select appropriate payment method from Type field and press ENTER
19. If the customer is paying in full, proceed as normal
20. If the customer is not paying in full, and you want to take a DEPOSIT, enter the amount that you want to charge as a deposit and process the sale as partly paid (a pop up will appear, asking you whether you wish to do this, and you must select yes)
21. If cash, enter amount given to you by the customer (change will be shown on bottom right hand corner)
22. Press RETURN to complete the sale and to print an A4 partial-sale "receipt"

23. When the NS items is picked in the warehouse, a notification advice note will be printed on your shop printer
24. Click on Order Processing icon on front page
25. Input the reference (stage 3 above) or the order number into Order number field and press ENTER – this will restore the order
26. Click on Process icon in grey header panel
27. If you have taken a partial payment, you must take the outstanding balance from the customer when they come to collect it

For ACCOUNT CUSTOMERS the process is exactly the same except at :-

Stage 2: change the Account number from the branch cash account to the customer's account number

Stage 3: enter the customer's order no rather than their name

Stage 8 (a): prices are excluding VAT as it is to an account customer

Stage 18: there should be no need to change the address

Stages 19-22: not required as the customer is an account customer