

Special Orders

Table Of Contents

1. Special Orders 3-18

SPECIAL ORDERS

Overview

Special Orders may be accessed from the title bar of a screen by clicking on the Special Order Cart icon  which is located on the right side of the IBIDie title bar. Three tabs available in the cart will be used in creating and reporting on the special order. When a special order is created, the special order items are dropped into TBO and a special order number is assigned to the order. You may print a special order request for the order entered.

From the Inventory screen, the quantity of special orders will display in the detail box on the right side of the screen. The status of Special Orders can be reviewed from the Inventory screen by selecting the **<F9> Status** button and then choosing the **<F10> Special** function. Special Order status may also be reviewed from the **Search** tab of the Special Order Cart.

The PO Receiving screen flags special ordered items with an asterisk (*) on a Purchase Order. The status of the special order can be viewed for an item by clicking the line and then selecting the **<F9> Status** button and then choosing the **<F10> Special** function. When special orders are received on a purchase order, you may print a Special Order Picking Report as well as a Special Order Insert for the product. These can be used to identify the product for the specific special order and customer and can also be used to contact your customer to let them know that their special order has arrived.

Special orders remain on the system and are not deleted automatically when the special ordered item is sold. You may purge special orders either individually or as a batch based on the selection criteria used in the **<F2> Purge** option located on the Special Orders Menu. Deleting special orders on a regular basis ensures that the records in the special orders file are either items that have not been received from the vendor or those orders not picked up by the customer.

This chapter provides an explanation for the following tasks:

- Add items to the Special Order Cart from your inventory database or reference database
- Add a customer to the Special Order
- Create a Special Order and add it to TBO
- Print a Special Order Request
- Cancel an item or an entire Special Order
- Special Order Review/Report

- Special Order Picking Report and Insert
- Take a Special Order Deposit
- Sell a Special Order at Point of Sales
- Refund a Special Order Deposit
- Purge
- Placeholder

Special Order Cart

Special Orders may be accessed from the title bar of a screen by clicking on the Special Order Cart icon  which is located on the right side of the IBIDie title bar. Three tabs available in the cart will be used in creating and reporting on the special order. Below is an explanation of the three tabs.

Current Items

Clicking on the Current Items Tab will display a screen of all Special Order items currently in the cart. You may also remove or edit any of the items currently in the cart from this screen. Clicking the garbage can beside the item to be removed will delete it from the cart. Clicking the edit button beside a line item will take you into edit mode for this item. You may edit the quantity and the Vendor, which is used in adding the item to the TBO list. (The Vendor will automatically default to the Vendor which is listed in the item's inventory record.) After editing, click Update to process the changes or Cancel to disregard the changes made.

Customer

This tab is used to attach a customer to your Special Order. Every special order must be tied to a customer record. You may search for an existing customer from your customer table. Enter the customer name & click the search button. If the customer exists in your customer table, the customer and account number will be displayed in the center of the screen. Click on "Select," which is to the left of the customer account number, to tie this customer to your Special order cart items. The items currently in the Special Order Cart will be displayed below the customer information on the screen. If you choose not to select a customer from the displayed results, click on the Clear button to remove the search results and begin again.

If the customer does not exist in your customer table, you may add the customer name, phone, address and email information in the appropriate fields at the top of the screen. Click the Add button to tie this customer to the Special Order cart items. ***Note*** Adding a customer in this screen only ties the customer to the Special Order cart items. It does not add the customer to your customer table. The items currently in the Special Order Cart will be displayed below the customer information on the screen.

Once you have selected an existing customer from a search or manually added a customer, choose the manor your customer wishes to be notified from the Notify Method drop-down menu. You may add any notes or special instructions in the

Notes/Instructions field.

At any time prior to creating the Special Order number, you may still add items to the cart.

When you have all items the customer wishes to place on the special order added to the cart, click the Create SPO button, located to the right of the customer name, to place all cart items onto a special order and have it assigned a special order number. The items on the special order are automatically dropped onto the appropriate TBO lists at this time. If you choose not to create a special order and to clear the cart, click the Cancel this SPO button and the customer and cart will be cleared.

Search

This tab is used to search for special orders which are in your system. You may search on information which is contained in the special order header such as last name, first name, customer account number, phone number, city, state, email address, order status or requested date. You may also search on data found in the special order line items such as item code, title, author, line status or Vendor.

Working With Special Orders

Add Item(s) To The Special Order Cart

You may add an item(s) to the Special order cart from your inventory database or your reference database (Companion or Books In Print). Adding to the cart from your **inventory database** is easily accomplished from the Inventory screen.

- **<F1> Inventory**
- Display the item from your inventory that you wish to add to the cart by using the **<F4> Find** command.
- **<F7> Go To**
- **<F8> SPO Cart**
- You will receive a message notifying you that the item has been added. Click **OK** and the message will be removed from your screen.
- Clicking on **<F8> SPO Cart** with the same inventory item displayed will add a second quantity of this same item to the cart. Click **OK** to remove the verification message.
- To add a different inventory item to the SPO Cart, **{esc} Back** to the original inventory record and display the next item you wish to add to the cart then follow the procedure as detailed above.
- Follow the same procedure to add each additional item to the cart.

You may also add an item to the cart from your inventory database easily via the TBO screen.

- **<F4> Ordering**

- **<F1> To Be Ordered**
- Click on the Item Code Lookup Icon, which is beside the Item Code Entry Block in the center of the screen.
- This takes you to the Item Code Lookup screen. Lookup the item you wish to add to the cart by either Isbn, Title, Author or Word and **<F4> Find**.
- Place your cursor anywhere on the line which displays your desired item.
- **<F8> SPO Cart**
- You will receive a message notifying you that the item has been added. Click **OK** and the message will be removed from your screen.
- Clicking on **<F8> SPO Cart** with your cursor on the line of the same inventory item will add a second quantity of this same item to the cart. Click **OK** to remove the verification message.
- To add a different inventory item to the SPO Cart, lookup the item you wish to add to the cart by either Isbn, Title, Author or Word then follow the procedure as detailed above.
- Continue the same procedure to add each additional item desired.

Adding to the cart from your **reference database** is easily accomplished from the inventory screen.

Note If the item does not currently exist in your store's inventory database, when adding an item to the SPO Cart via the reference database, an inventory record will automatically be created for this item at the same time using the Vendor, Department & Category defaults from your configuration screens. The Misc.-2 field in the inventory record will be filled with the word AUTO. This will easily enable you to review on screen or run a report of all items that were added from the reference database. The Notes field of the newly created inventory record will display the Publisher and Category which the reference database provider supplies enabling you to easily edit the inventory record which was automatically created from defaults to values which more accurately reflect the item.

- **<F1> Inventory**
- **<F8> Companion** or **<F8> BIP**, depending on which reference database you are using.
- Lookup the item you wish to add to the cart from one of the methods listed on the Lookup drop-down menu such as isbn, title, author, keyword(s), etc.
- **<F4> Find**
- Place your cursor anywhere on the line which displays your desired item.
- **<F7> SPO Cart**
- You will receive a message notifying you that the item has been added. Click **OK** and the message will be removed from your screen.
- Clicking on **<F7> SPO Cart** with your cursor on the line of the same item will add a second quantity of this same item to the cart. Click **OK** to remove the

verification message.

- To add a different item to the SPO Cart, lookup the item you wish to add to the cart as described previously then follow the procedure as detailed above.
- Continue the same procedure to add each additional item desired.

You may also add an item to the cart from your reference database easily via the TBO screen.

- **<F4> Ordering**
- **<F1> To Be Ordered**
- Click on the Item Code Lookup Icon, which is beside the Item Code Entry Block in the center of the screen.
- **<F7> Companion or <F7> BIP**, depending on which reference database you are using.
- Lookup the item you wish to add to the cart from one of the methods listed on the Lookup drop-down menu such as isbn, title, author, keyword(s), etc.
- **<F4> Find**
- Place your cursor anywhere on the line which displays your desired item.
- **<F7> SPO Cart**
- You will receive a message notifying you that the item has been added. Click **OK** and the message will be removed from your screen.
- Clicking on **<F7> SPO Cart** with your cursor on the line of the same item will add a second quantity of this same item to the cart. Click **OK** to remove the verification message.
- To add a different item to the SPO Cart, lookup the item you wish to add to the cart as described previously then follow the procedure as detailed above.
- Continue the same procedure to add each additional item desired.

Additionally, items may be added to the cart from your inventory or reference database via the globe icon  which is located on the right side of the IBIDie title bar.

Note If the item does not currently exist in your store's inventory database, when adding an item to the SPO Cart via the reference database, an inventory record will automatically be created for this item at the same time using the Vendor, Department & Category defaults from your configuration screens. The Misc.-2 field in the inventory record will be filled with the word AUTO. This will easily enable you to review on screen or run a report of all items that were added from the reference database. The Notes field of the newly created inventory record will display the Publisher and Category which the reference database provider supplies enabling you to easily edit the inventory record which was automatically created from defaults to values which more accurately reflect the item.

- Click on the globe icon.
- Select your reference database (Companion or Books in Print) from the drop-down.

- Lookup the item you wish to add to the cart from one of the methods listed on the Lookup drop-down menu such as isbn, title, author, keyword(s), etc.
- **<F4> Find**
- Place your cursor anywhere on the line which displays your desired item.
- **<F7> SPO Cart**
- You will receive a message notifying you that the item has been added. Click **OK** and the message will be removed from your screen.
- Clicking on **<F7> SPO Cart** with your cursor on the line of the same item will add a second quantity of this same item to the cart. Click **OK** to remove the verification message.
- To add a different item to the SPO Cart, lookup the item you wish to add to the cart as described previously then follow the procedure as detailed above.
- Continue the same procedure to add each additional item desired.

Add A Customer To The Special Order, Create A Special Order And Add Items To TBO List

A Special Order is created from the Customer Tab within the Special Order Cart. The process is detailed in the Special Order Cart, Customer Tab section documented above. When the special order is assigned a special order number, the items on the special order are automatically dropped onto the appropriate TBO lists. The special order cart is cleared when the items are assigned a special order number readying it for the next use.

Print A Special Order Request

After entering special order items and a customer to your special order cart, click on the Create SPO button from the Customer Tab of the Special Order Cart to create your special order. A message box pops up in the center of the screen stating the Special Order number which has been created. Click OK and the Special Order Request box pops up automatically on the screen. You may view the request on the screen or scroll down the screen and click the Print a copy button. A print box opens. Select your report printer and click the Print button. You may now close out of the Special Order Request box.

Cancel An Item Or An Entire Special Order

Click on the Search Tab of the Special Order Cart. Search for the special order you wish to work with using any of the search criteria available and clicking the Search button. When you have the Special Order displayed on the screen, click the Edit button to enter the edit mode for this Special Order. To cancel a line item from the Special Order, scroll down the Special Order Maintenance screen to the Details section. Click on the picture of the pencil to the left of the item you wish to cancel. This will put this line in edit mode and from the status drop-down menu, select status 6-Cancelled. Next click the green update checkmark to the left of the item code to accept this change. A message box will appear stating that the detail has been updated. Click OK. If you decide not to update the status change, instead click the red X to the left of the item code. This will exit you from the edit mode without making any changes to the line. To cancel the entire Special Order, first cancel each and every line item on the Special Order as

described previously. Next you will scroll up to the Header Status drop-down menu and select 6-Cancelled to mark the Header as cancelled. Click the Update Master Record button to accept this change. If you decide not to update the header status change, click the Cancel Update button. ***Note*** The system will not allow you to cancel an entire special order if a special order deposit remains on file. The special order deposit must be used or refunded to the customer in order to cancel an entire special order.

Create A Special Order Report & Print It

Click on the Search Tab of the Special Order Cart. Search for the special order criteria you wish to report on. For example you may wish to see a report of all special orders requested in the last 30 days. From the requested date drop-down field choose Last 30 Days. A report will appear on the screen of all Special Orders created in the last 30 days as shown below:

SPO / SPO Item Lookup

Current Items | Customer | Search

Special Order Information

Last Name: [] First Name: [] Customer Acct#: [] Order Status: ALL
 Requested Date: Last 30 Days
 From: 2/18/2009 To: 3/20/2009
 Phone#: [] City: [] State: [] Email Address: [] SPO #: []

Special Order Line Items

ItemCode: [] Title: [] Author: [] Line Status: ALL Vendor: ALL
 Search [] Clear [] Print []

Spo#	LastName	FirstName	Address1	Address2	City	State	Zip	Phone	Deposit	Status	Requested																								
2872	VALLENTINE	JOHN F.	1081 SOUTH 700 EAST		SPRINGVILLE	UT	84663	46.50	3		03/19/2009																								
Account Email Notes																																			
SCORUP																																			
<table border="1"> <thead> <tr> <th>ItemCode</th> <th>Qty</th> <th>List Status</th> <th>Updated</th> <th>Title</th> <th>Author</th> <th>Vendor Code</th> <th>PoNo</th> </tr> </thead> <tbody> <tr> <td>9781905641970 2</td> <td>30.00</td> <td>5</td> <td>3/19/2009 11:19:20 AM</td> <td>Opportunity Dubai: How I Made Cooper, Peter & Fortune in the Mid</td> <td>J.</td> <td>ING</td> <td></td> </tr> <tr> <td>9781932000306 2</td> <td>20.00</td> <td>3</td> <td>3/19/2009 11:19:20 AM</td> <td>Graphic Design Journal: Europe, Pedersen, B. Africa and the Mid</td> <td>Martin</td> <td>ING</td> <td></td> </tr> </tbody> </table>												ItemCode	Qty	List Status	Updated	Title	Author	Vendor Code	PoNo	9781905641970 2	30.00	5	3/19/2009 11:19:20 AM	Opportunity Dubai: How I Made Cooper, Peter & Fortune in the Mid	J.	ING		9781932000306 2	20.00	3	3/19/2009 11:19:20 AM	Graphic Design Journal: Europe, Pedersen, B. Africa and the Mid	Martin	ING	
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2871	PEREZ	KAYLA	4000 HIGHWAY 154		SANTA BARBARA	CA	93105	967-0978	31.00	4	03/19/2009																								
Account Email Notes																																			
9670978																																			

Click the Print button at the top of the Search screen. The report will be displayed in a printable report format. If you wish to print out a hard copy, click the picture of the printer in the upper left hand corner of the screen, select your print options from the screen which pops up and click **<OK>**. Another report screen will open. Click the picture of the printer in the upper left hand corner and click **<OK>** to print out your report.

Print A Special Order Picking Report And Insert

A Special Order Picking Report and a Special Order Insert may be printed from the PO Receiving screen.

After you have processed a purchase order which contains an item(s) which is currently open on a special order(s), an automatic question will come up on the screen asking "Print Special Order Picking Report?" Clicking on "Yes" will pull the Special Order Pick List up on the screen allowing you to review it on screen or print it. Clicking on "No" will stop the Special Order Pick List from being displayed. You may also print the Special Order Pick List after processing the PO from **<F7> Print, <F5> List**. This Special Order Picking Report may be used to pull product which was just received and set it aside to fill the special order(s).

A Special Order Insert may be printed, which specifies the hold date as entered. An insert will be printed for each special ordered product just received and will reference the Customer Account number, if one exists, the Special Order number, item code received, title, author, quantity received and the hold date entered. You may insert this in the special order product just received and use it to contact your customer as well as monitor how long you wish to hold the product for pickup. To print a special order insert after processing the PO, select **<F7> Print, <F7> Inserts**.

Take A Special Order Deposit

IBIDie has the ability to take a special order deposit and maintain it's balance. If you are going to use the special order deposit feature, make sure that you have activated your Deposit tender type in the Tender Table. You may take the special order deposit at the cash register after the customer's special order number has been created.

If you know the special order number, manually enter the number in the SPO number field at the top of the cash register screen and then tab or click outside of the field with the mouse. If the special order is tied to a customer in the customer table, the customer name and account number will pre-fill automatically. If you do not know the special order number, you may look it up and select it back from the lookup icon to the right of the SPO number field. As the system identifies the special order number, a message will display on the screen asking you "Preload SPO?" Select 'N'o. **Preloading is not used when taking a Special Order Deposit**. Next, enter the dollar amount of the Special Order Deposit in the price entry field, which is in the middle of the cash register screen, as seen below:

IBID/ie 1.10.24.BETA Cash Register

Date: 10/21/2008 12:31:29

Reg	Trans	Clerk	Disc	Reason	Account	Customer Name	Spo No	Deposit	Invoice	Chg	Ch
9	657	37		-none-	7357949	SMITH, LARRY	2775	\$0.00			

Line	Item Code	Price	Qty	Disc	Reason	Description	Tx	Ref	Dept.

Item Code	Price	Qty	Disc	Reason	Description	Tx	Ref	Dept	Tot
	25.00	1		-none-				--none--	

esc	X	←	Clr
7	8	9	->
4	5	6	<
1	2	3	
0	.		F9

No Image Available

Sub-Total

Tax

Total

F1 Add	F2 Void	F3 >> Cancel	F4 Extend	F5 Validate	F6 Reprint	F7 Invoice	F8 Customer	F9 Complete	F10 NoSale	F11 >> Special	F12 Clear
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Select **<F11> Special**, then **<F9> Deposits**. The Special Order Deposit will move to the top of the Cash Register screen and you will complete the transaction by entering the form of payment received from the customer in the Tender Amount and Tender Type fields as seen below:

IBID/ie 1.10.24.BETA
Date: 10/21/2008 12:43:50

Cash Register

Reg	Trans	Clerk	Disc	Reason	Account	Customer Name	Spo No	Deposit	Invoice	Chg	Cl
9	658	37		-none-	7357949	SMITH, LARRY	2775	\$0.00			

Line	Item Code	Price	Qty	Disc	Reason	Description	Tx	Ref	Dept.	
1		\$25.00	1	0	-none-	Deposits			Deposits	\$2

Item Code	Price	Qty	Disc	Reason	Description	Tx	Ref	Dept	Tot
		1		-none-				--none--	

No Image Available

esc	X	←	Clr
7	8	9	->
4	5	6	<
1	2	3	F9
0	.		

Sub-Total

Tax

Total

Amount Due

Tender Amount \$25.00

Tender Type CASH

F1 Add	F2 Void	F3>> Cancel	F4 Extend	F5 Validate	F6 Report	F7 Invoice	F8 Customer	F9 Accept	F10 NoSale	F11 GC Inq	F12 Clear
--------	---------	-------------	-----------	-------------	-----------	------------	-------------	-----------	------------	------------	-----------

Select **<F9> Accept** to complete the transaction.

Sell A Special Order At Point Of Sale & Use A Special Order Deposit

In order for a special order to be closed out properly and tracking of the special order to be accurate within the system, it is **imperative** that the SPO number be tied to the sale of the special ordered product when selling out the product at the cash register.

This is accomplished by entering the appropriate SPO number in the SPO number field at the top of the cash register screen. If you have an insert with the special ordered product, the special order number is listed on the insert along with a scannable bar code. Place your cursor in the SPO number field at the top of the cash register screen and scan the bar code located on the insert or manually enter the number in the SPO number field and then tab or click outside of the field with the mouse. If the special order is tied to a customer in the customer table, the customer name and account number will pre-fill automatically. If you do not know the special order number, you may look it up and select it back from the lookup icon to the right of the SPO number field. As the system identifies the special order number, a message will display on the screen asking you "Preload SPO?" Select 'Y'es to automatically pre-load special ordered product, which has arrived for this special order, into your cash register screen. If you do not wish to sell out all product that was pre-loaded at this time, you may edit the sales screen by canceling any line items as necessary and/or adding the product back onto the receipt with different quantities. Select 'N'o if you do not wish to pre-load special ordered product and instead wish to add it manually to the receipt.

If a special order deposit was previously taken for this special order, the amount of the deposit on file will be displayed in the Deposit field at the top of the cash register screen, thus alerting the clerk that there are special order deposit funds which may be applied to this sale.

Complete the sale as you would any other transaction. If a special order deposit exists, enter the amount of the special order deposit you wish to apply as a tender in the Tender Amount field and select Deposit as your tender type. Continue indicating your amounts and tender types of any additional payment methods used on this sale.

Refund A Special Order Deposit

There may be instances when you will need to return a customer's special order deposit. One instance may be when you are unable to obtain the special ordered product and must cancel the special order and refund the deposit.

If you know the special order number, manually enter the number in the SPO number field at the top of the cash register screen and then tab or click outside of the field with the mouse. If the special order is tied to a customer in the customer table, the customer name and account number will pre-fill automatically. If you do not know the special order number, you may look it up and select it back from the lookup icon to the right of the SPO number field. Any deposit on file for this special order will be displayed in the deposit field to the right of the SPO No. As the system identifies the special order number, a message will display on the screen asking you "Preload SPO?" Select 'N'o.

Preloading is not used when refunding a Special Order Deposit. Next, enter the dollar amount of the Special Order Deposit to be refunded in the price entry field, which is in the middle of the cash register screen (enter as a positive dollar amount). Insert a checkmark in the Refund data field box (Ref), as seen below:

IBID/ie 1.10.32.BETA.KBDG
Date: 3/17/2009 17:06:00

Cash Register

Reg	Trans	Clerk	Disc	Reason	Account	Customer Name	Spo No	Deposit	Invoice	Chg	Cl
9	951	37		-none-	6885279	HUNTER, ANGELA	2832	\$30.00			

Line	Item Code	Price	Qty	Disc	Reason	Description	Tx	Ref	Dept.
		30.00	1		-none-				--none--

esc	X	←	Clr
7	8	9	->
4	5	6	<
1	2	3	F9
0	.		

No Image Available

Sub-Total

Tax

Total

F1 Add	F2 Void	F3 >> Cancel	F4 Extend	F5 Validate	F6 Reprint	F7 Invoice	F8 Customer	F9 Complete	F10 NoSale	F11 >> Special	F12 Clear
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Select **<F11> Special**, then **<F9> Deposits**. The Special Order Deposit Refund will move to the top of the Cash Register screen. The dollar amount will be displayed as negative dollar amount, indicating that it is a return. You will complete the transaction by entering the Tender Type used to refund the special order deposit back to the customer. The example below shows the special order deposit being refunded back to the customer in cash.

IBID/ie 1.10.32.BETA.KBDG Cash Register

Date: 3/17/2009 17:06:00

Reg	Trans	Clerk	Disc	Reason	Account	Customer Name	Spo No	Deposit	Invoice	Chg Cl
9	951	37		-none-	6885279	HUNTER, ANGELA	2832	\$30.00		

Line	Item Code	Price	Qty	Disc	Reason	Description	Tx	Ref	Dept.	
1		\$30.00	-1	0	-none-	Deposits	R		Deposits	(\$30.00)

Item Code	Price	Qty	Disc	Reason	Description	Tx	Ref	Dept	Total
		1		-none-				--none--	

No Image Available

esc	X	←	Clr
7	8	9	->
4	5	6	<
1	2	3	F9
0	.		

Sub-Total (\$)

Tax

Total (\$)

Change Amount

Change Type **CASH**

F1 Add
F2 Void
F3>> Cancel
F4 Extend
F5 Validate
F6 Report
F7 Invoice
F8 Customer
F9 Issue
F10 NoSale
F11>> Special
F12 Clear

Select **<F9> Issue** to complete the transaction.

Purge Canceled Or Closed Special Orders

Special orders remain on the system and are not deleted automatically when the special ordered item is sold or the special order is canceled. You may purge special orders either individually or as a batch based on the selection criteria used in the **<F2> Purge** option located on the Special Orders Menu. Deleting special orders on a regular basis ensures that the records in the special orders file are either items that have not been received from the vendor or those orders not picked up by the customer. The system will not allow you to cancel or purge a special order if a special order deposit remains on file. The special order deposit must be used or refunded to the customer in order to cancel or purge a special order.

The Special Order Purge is accessed from the main menu by selecting **<F11> Special Orders** and **<F2>Purge**. The screen is shown below:

IBID/ie 1.10.32.BETA.KBDG
Date: 3/30/2009 12:52:32

Special Order Clean Up

Method Orders Found:

Special Orders prior to and including date:

SPO No.	Account	Name	Requested	Closed	Cancelled	Deposit
2871	9676978	PEPEZ, KAYLA	3/19/2009			\$31.68
2872	SCORUP	VALLENTINE, JOHN F.	3/19/2009			\$46.50
2873	6884210	QUIGLEY, KAY	3/20/2009			\$43.95
2874	KIT WITCH	WILSON, LAURA	3/20/2009			\$0.00
2877	4989782	FOX, WENDY J	3/24/2009			\$0.00
2878	7359451	KING, JONATHAN	3/25/2009			\$0.00
2879	6865187	BLACK, JETT	3/25/2009			\$0.00
2883	6883367	PARK, ANJIE	3/27/2009			\$0.00
2884	6883367	PARK, ANJIE	3/27/2009			\$0.00
2885	6883367	PARK, ANJIE	3/27/2009			\$0.00
2886	6883367	PARK, ANJIE	3/27/2009			\$0.00
2887	6883367	PARK, ANJIE	3/27/2009			\$0.00
2889	5655875	PHILLIPS, SUSAN	3/27/2009			\$0.00
2890	7400742	WHITE, VICTORIA	3/27/2009			\$0.00
2892	6931928	WINTERS, JAN	3/27/2009			\$0.00
2893	6888952	FORAKER, CYBELE	3/27/2009			\$0.00
2894	6889466	ROBB, KATHY	3/30/2009	3/30/2009		\$0.00

F1 F2 **F3 Purge** **F4 Find** F5 F6 F7 F8 **F9 Cancel** F10 F11 **F12 Clear**

- First choose the method by which you would like to display the special orders. Use the drop-down menu to select by date, number or account.
- If you chose date, you will be prompted to enter a date for the following: "Special Orders prior to and including date:"
- If you chose number, you will be prompted to enter a "Special Order Number:"
- If you chose account, you will be prompted to enter an account number for the following: "Special Orders for this Account:"
- **<F4> Find** to display your special orders as requested.
- **<F12> Clear** will clear your results and allow you to begin the process again.
- When you have special orders displayed on the screen according to your preference, select **<F3> Purge**. A message will ask you to confirm that you wish to purge special orders listed as canceled or completed. Select 'Y'es to purge those special orders. Select 'N'o if you wish to abort the process. If you select 'Y'es to purge the special orders, you will receive a message indicating the number of special orders deleted. Click OK.

Other Functions

- The **<F9> Cancel** button allows you to cancel an entire special order by highlighting a special order which has been displayed on the screen and selecting **<F9> Cancel**. You will be asked to confirm this action by answering

'Y'es to cancel the entire special order or 'N'o to abort the process.

Placeholder Overview

Special Orders will allow a placeholder to be added to the special order cart. A placeholder is used when you do not know the specific item code of the title the customer wishes to order and need more time to research the request for the exact item code and title. A special order may be created with a placeholder and then updated to reflect the true item code after you have researched and added the title to your inventory. Only one placeholder item code may be added to your special order cart, however, it may be added to the cart along with non-placeholder item codes.

Configuration

Create an item code in your inventory screen to represent your placeholder. We recommend using PH as the item code as this will make it easy to search for any special orders with the item code of PH (any special orders with placeholders).

Reference the placeholder item code you just created in the ordering configuration screen. **<F2> Configuration, <F1> Computer Setup**, select the **Ordering** page from the drop-down menu, enter the placeholder item code in the **SO Place Holder SKU** field and select **<F2> Update**. You will receive a message confirming the update. Click **OK**. You will receive a message asking if you wish to exit. Select **'Y'es** as you must log out & back in after making this change to your configuration screen. You are finished configuring your system to use a special order placeholder.

Add A Placeholder To The Special Order Cart

- **<F1> Inventory**
- Display your placeholder item code (PH if you have followed our recommendation) by using the **<F4> Find** command.
- Enter as much information as you know in the title and author fields of the placeholder record as this information will be displayed in your special order cart, as well as, in your special order when it is created.
- **<F7> Go To**
- **<F8> SPO Cart**
- You will receive a message notifying you that the item has been added. Click **OK** and the message will be removed from your screen.
- Clicking on **<F8> SPO Cart** with the placeholder item code displayed will add a second quantity of this placeholder item code to the cart. Click **OK** to remove the verification message.
- To add a different non-placeholder inventory item to the SPO Cart, **{esc} Back** to the original inventory record and display the next item you wish to add to the cart then follow the procedure as detailed above.
- Follow the same procedure to add each additional item to the cart.

Add A Customer To The Special Order, Create A Special Order Which Includes A Placeholder And Add Items To TBO List

A Special Order is created from the Customer Tab within the Special Order Cart. The process is detailed in the Special Order Cart, Customer Tab section documented previously. When the special order is assigned a special order number, the items on the special order are automatically dropped onto the appropriate TBO lists with the exception of the placeholder item code. The placeholder item code **is not** dropped onto

a TBO list. The special order cart is cleared when the items are assigned a special order number readying it for the next use.

Updating The Placeholder Item Code To The Actual Item Code And Adding This Item Code To TBO List

After you have researched the placeholder to determine it's specific bibliographic information, you must replace the placeholder within the special order with the actual item code.

- Add an inventory record for the actual item in **<F1> Inventory**.
- Search for the specific special order in the search tab of the special order cart.
- With the special order displayed, click the Edit button to enter the edit mode for this special order.
- Scroll down the Special Order Maintenance screen to the Details section.
- Click on the picture of the pencil to the left of the placeholder item code.
- You are now in detail edit mode. Replace the placeholder item code with the real item code by highlighting the placeholder item code and typing over it.
- Click the green update checkmark to the left of the item code to accept this change.
- A message box will appear stating that the detail has been updated.
- Click OK.
- The actual item code which replaced the placeholder has now been dropped onto the TBO List using the Vendor from the inventory record.