# Special Order Guide

## for the AcuSport® V6 System Software

January 2015

The AcuSport Retail Technology Group (RTG) recommends completing the procedures in this guide to set up and utilize the special order features in the V6 system software.

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AcuSport® Retail Technology Group


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## Publication Information

Special Order Guide for the AcuSport® V6 System Software
January 2015

# Overview

The following circumstances are required to utilize the special order features:

- The FOM application must be enabled.
- The POS application must be online.
- The POS application must be able to communicate with the IMS application.

## Set Up Special Order Policies

Complete the following procedures to prepare the tools the POS and IMS applications will use to process special orders:

- Create a Special Order Policy Letter
- Link the Letter to the Special Order Function
- Set Up a Restocking Fee Function

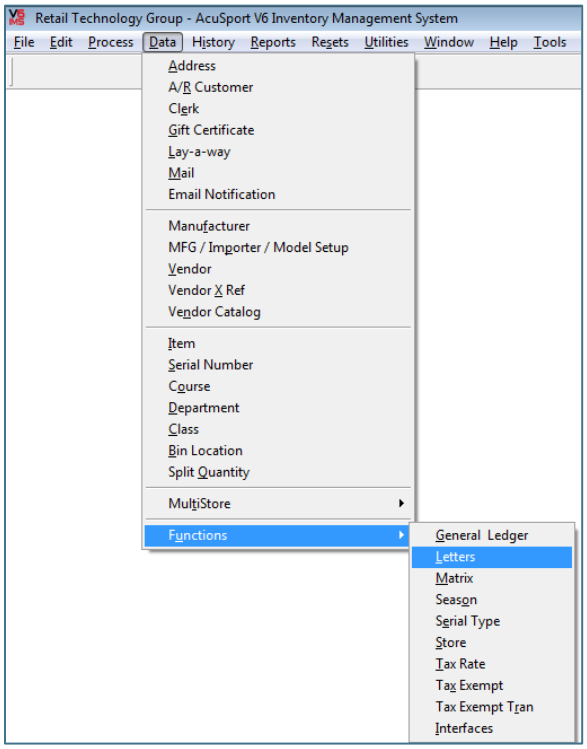
## Use Special Order Features

- Create a Special Order
- Finalize the Sale of a Special Order
- Cancel a Special Order
- Correct a Special Order Issue

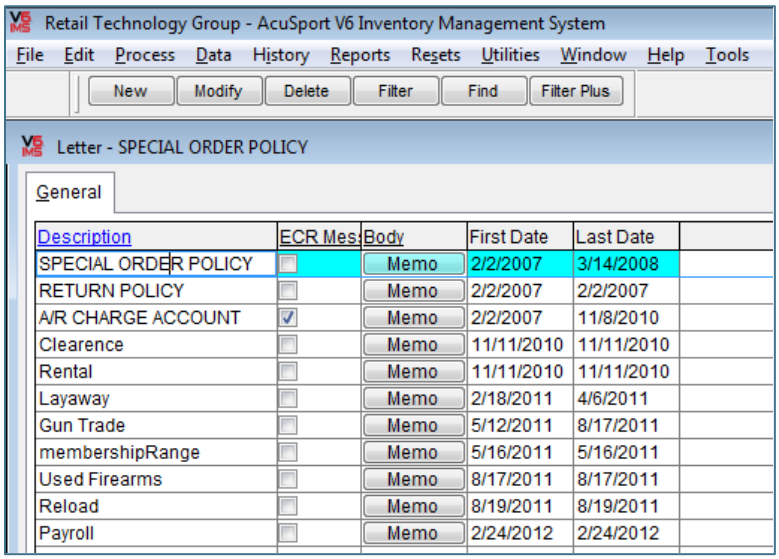
# Create a Special Order Policy Letter

Complete the following procedure to create a special order policy letter to print on the customer's receipt at the POS.

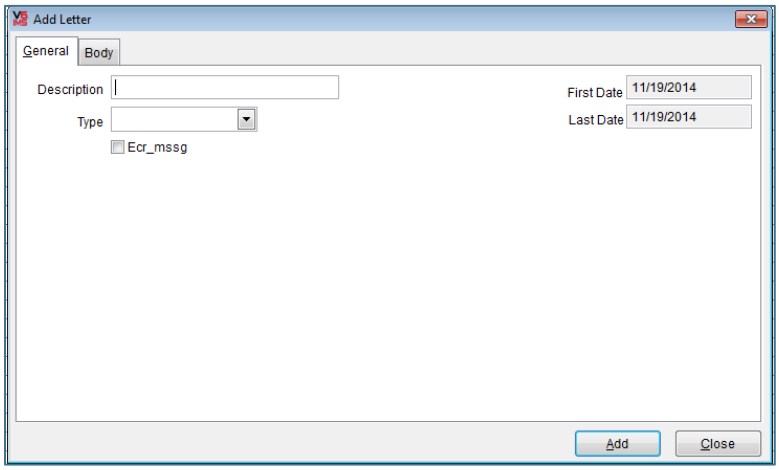
1. Log in to the **IMS** application.




2. Select **Data > Functions > Letters** from the menu bar to display the **Letter** screen.



3. Complete one of the following procedures to display the **Add Letter** (or **Edit Letter**) window as appropriate:
   - If the list does not contain a special order letter, click the **New** button to display the **Add Letter** window.
   - If the list contains an existing special order letter,
     1. Click the letter to select it.
     2. Click the **Modify** button to display the **Edit Letter** window.

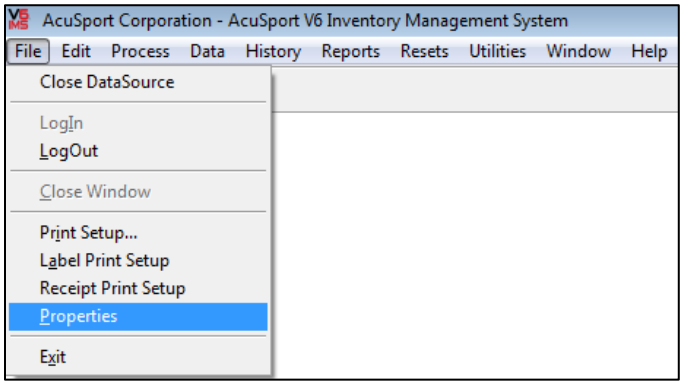



4. Enter/edit the name of the letter (i.e., “Special Order”) in the **Description** field.
5. Complete the other fields on the **General** tab.
6. Enter/edit letter text on the **Body** tab.
7. If desired, check the **Ecr_mssg** checkbox to enable letters to print to an invoice printer besides the receipt printer.
8. Click the **Add** (or **OK**) button to close the window and add/update the letter on the list.

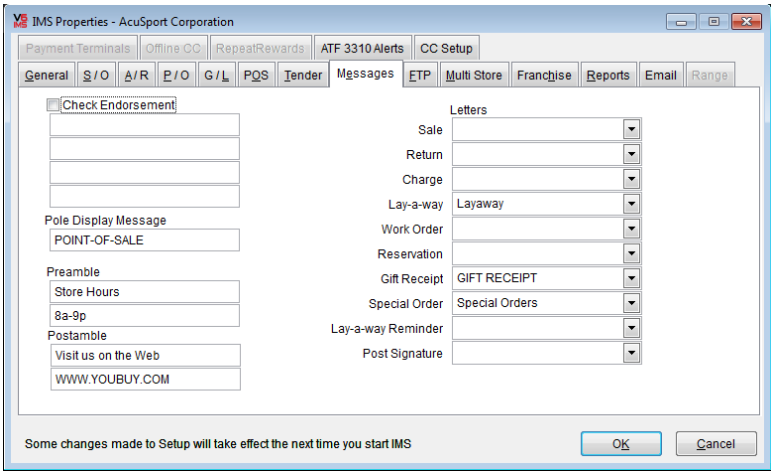
# Link the Letter to the Special Order Function

Complete the following procedure to create a link between the special order policy letter and the special order function so the letter will print on special order receipts.

1. Log in to the **IMS** application.




2. Select **File > Properties** from the menu bar to display the **Properties** window.
3. Click the **Messages** tab to display it.




4. Select the special order letter from the **Special Order** field's dropdown menu.
5. Click the **OK** button to close the **Properties** window.
6. Select **Utilities > Build POS Data** from the menu bar to update the POS.
7. Log in to the **POS** application.

   ► If the FOM is not currently enabled, enable it now.

   ► If the **F11** button is labeled "**Go Online**," click it to send the POS online. (If it is labeled "**Go Offline**," the POS is already online.)

8. Click the **Download (F6)** button to complete the download process.

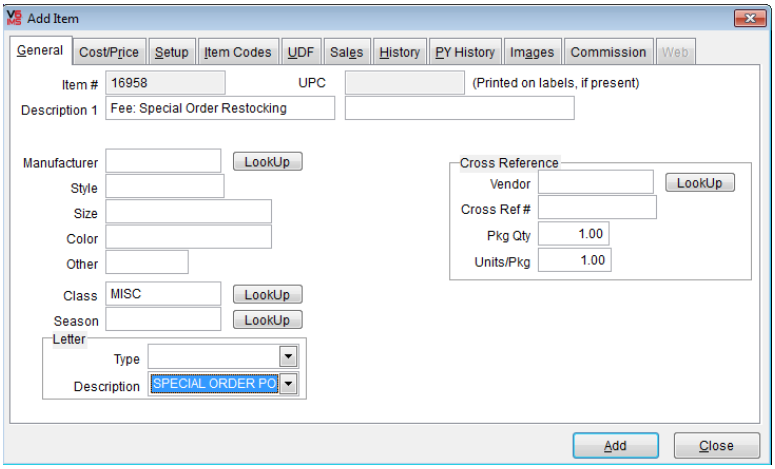
# Set Up a Restocking Fee Function

Complete either of the following procedures to establish a method for assigning a restocking fee to a cancelled/voided special order.

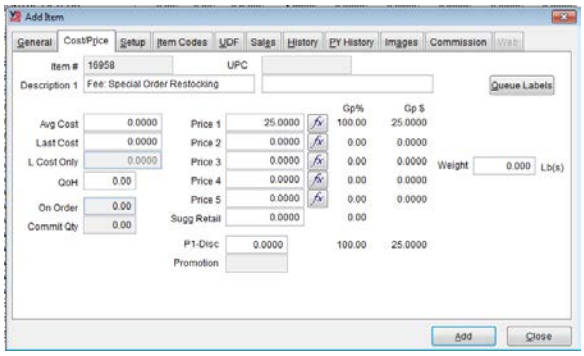
- Create a Restocking Fee Item Code
- Create a Restocking Fee Tender Key

# Create a Restocking Fee Item Code

1. Log in to the **IMS** application.
2. Select **Data > Item** from the menu bar to display the **Item** screen.
3. Click the **New** button to display the **Add Item** window.



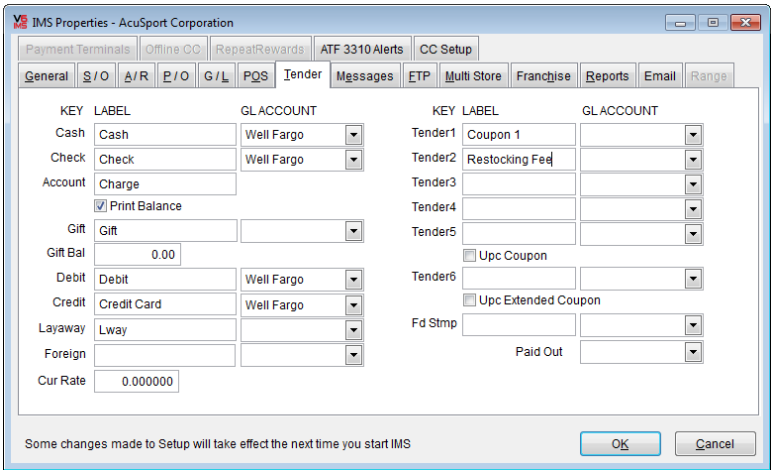

4. Enter a name for the restocking fee in the **Description 1** field.
5. Enter (or Lookup and select) an appropriate class for the fee in the **Class** field.
6. Select the special order letter from the **Description** field's dropdown menu in the Letter section.
7. If desired, complete the following procedure to assign a standard, flat amount for the fee:
    1. Click the **Cost/Price** tab to display it.




    2. Enter the fee amount in the **Price 1** field.
8. Click the **Add** button to save the fee.
9. Click the **Close** button to close the **Add Item** window.
10. Complete the Build POS Data and Update Register(s) procedure to build POS data and update each register using the  register(s):

# Create a Restocking Fee Tender Key

1. Log in to the **IMS** application.
2. Select **File > Properties** from the menu bar to display the **Properties** window.
3. Click the **Tender** tab to display it.




4. Locate an unused tender (**Tender 1** – **Tender 6**) field.
5. Enter a name for the restocking fee in the appropriate tender field.
6. Click the **OK** button to close the **Properties** window.
7. Select **Utilities > Build POS Data** from the menu bar to update the POS.
8. Log in to the **POS** application.

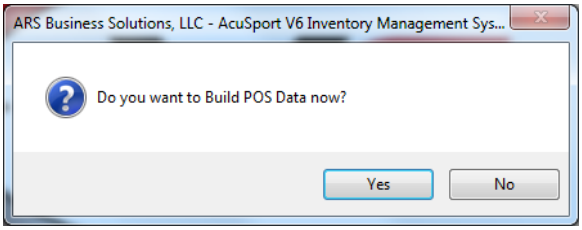
   ► If the FOM is not currently enabled, enable it now.

   ► If the **F11** button is labeled "**Go Online**," click it to send the POS online. (If it is labeled "**Go Offline**," the POS is already online.)

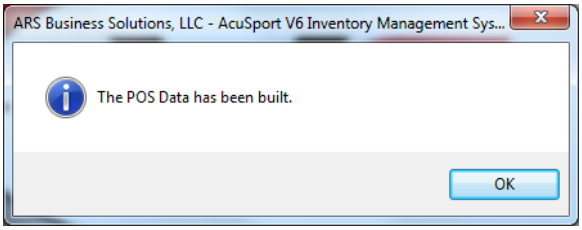
9. Click the **Download (F6)** button to complete the download process.

# Build POS Data and Update Register(s)

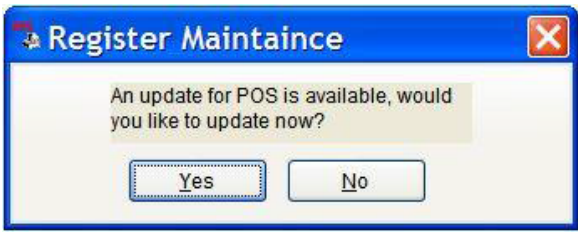
1. Select **Utilities > Build POS Data** from the Main Menu Bar to display a confirmation window.



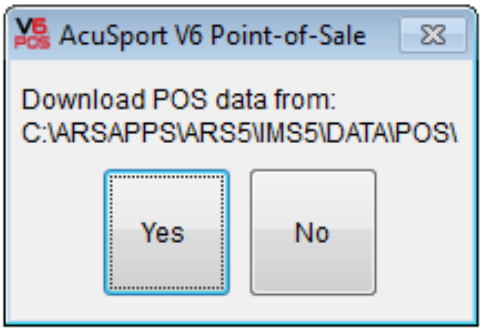

2. Click the **Yes** button to start the build process.
3. When the build process is complete, the system displays a confirmation window



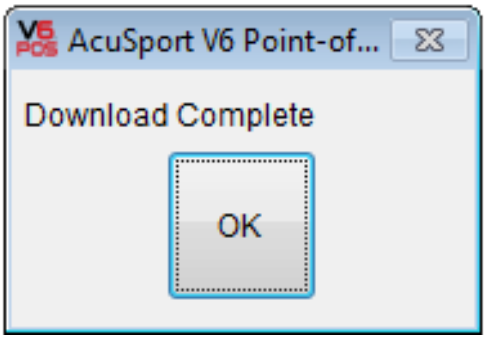

4. Click the **OK** button to close the window.
5. Complete the remaining steps for each individual register using the AcuSport V6 system
6. Close out of the POS at the register.
7. Click the **V6 POS** icon on the desktop to display the **Register Maintenance** window.




8. Click the **Yes** button to update the register.
9. When the update is finished, the **V6 Point-of-Sale** screen will display as normal.
10. Click the **Download** (**F6**) button to display a confirmation window.




11. Click the **Yes** button to download data and display a completed download confirmation window.




12. Click the **OK** button to close the window.

# Create a Special Order

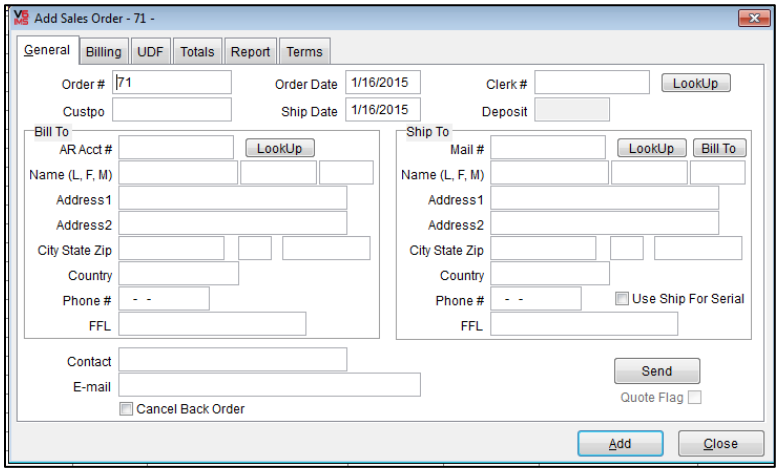
Complete either of the following procedures to create a special order.

- Create a Special Order from the IMS
- Create a Special Order from the POS

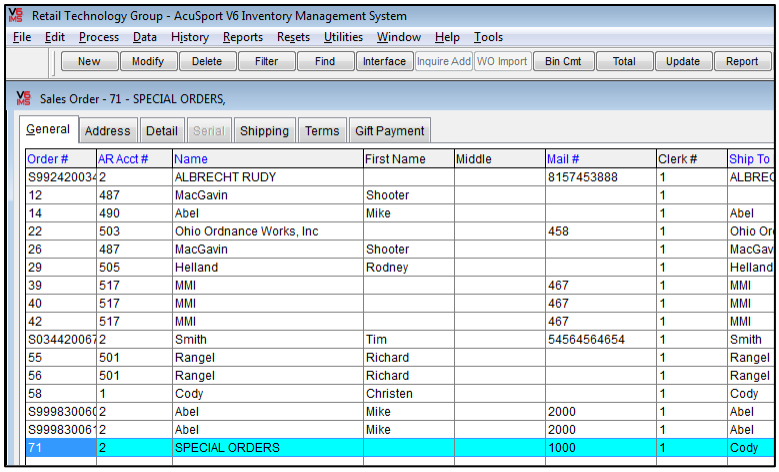
# Create a Special Order from the IMS

Complete the following procedure to place an item on special order through the IMS application.

1. Log in to the **IMS** application.
2. Select **Process > Sales Order** from the menu bar to display the **Sales Order** screen.
3. Click the **New** button to display the **Add Sales Order** window.




4. Complete the fields as desired:
   - If needed, the system-generated **Order #** field may be edited.
   - Enter (or Lookup and select) the **Special Order** account in the **AR Acct #** field in the **Bill To** section.
   - Enter (or Lookup and select) the desired customer account in the **AR Acct #** field in the **Ship To** section.
   - If previous back orders should be cancelled, check the **Cancel Back Order** checkbox.
   - If the special order is only a quote, check the **Quote Flag** checkbox.
5. Click the **Add** button to add the special order to the **Sales Order** screen.




| Order # | AR Acct # | Name | First Name | Middle | Mail # | Clerk # | Ship To |
|---|---|---|---|---|---|---|---|
| S992420034 | 2 | ALBRECHT RUDY | | | 8157453888 | 1 | ALBREC |
| 12 | 487 | MacGavin | Shooter | | | 1 | |
| 14 | 490 | Abel | Mike | | | 1 | Abel |
| 22 | 503 | Ohio Ordnance Works, Inc | | | 458 | 1 | Ohio Or |
| 26 | 487 | MacGavin | Shooter | | | 1 | MacGav |
| 29 | 505 | Helland | Rodney | | | 1 | Helland |
| 39 | 517 | MMI | | | 467 | 1 | MMI |
| 40 | 517 | MMI | | | 467 | 1 | MMI |
| 42 | 517 | MMI | | | 467 | 1 | MMI |
| S034420067 | 2 | Smith | Tim | | 54564564654 | 1 | Smith |
| 55 | 501 | Rangel | Richard | | | 1 | Rangel |
| 56 | 501 | Rangel | Richard | | | 1 | Rangel |
| 58 | 1 | Cody | Christen | | | 1 | Cody |
| S999830060 | 2 | Abel | Mike | | 2000 | 1 | Abel |
| S999830061 | 2 | Abel | Mike | | 2000 | 1 | Abel |
| 71 | 2 | SPECIAL ORDERS | | | 1000 | 1 | Cody |

6. Receive one or more deposits through the POS.

► Before attempting to receive the deposit, be sure to complete the **Build POS Data** procedure in the IMS application and the **Download** procedure in the POS application to ensure the special order can be selected in the POS. Refer to Create a Special Order from the POS for information on receiving special order deposits.

# Create a Special Order from the POS

Complete the following procedure to place an item on special order or to collect a deposit for an existing special order.

1. Log in to the **POS** application.

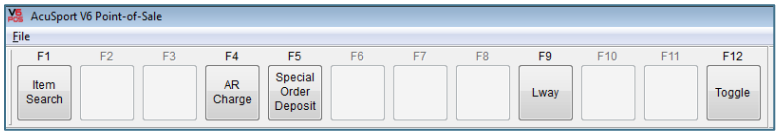
   ► If the FOM is not currently enabled, enable it now.

   ► If the **F11** button is labeled "**Go Online**," click it to send the POS online. (If it is labeled "**Go Offline**," the POS is already online.)

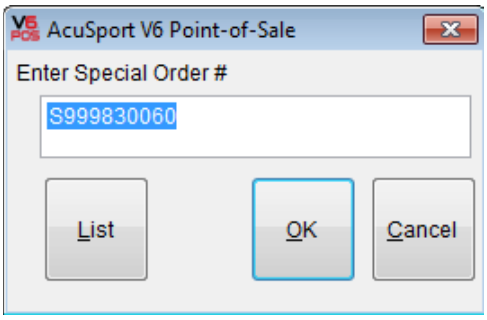
2. If needed, click the **Point-of-Sale (F2)** button to display the set of buttons shown below.

   ► If other windows (PIN entry, etc.) appear, complete or cancel them as appropriate.

3. Click the **Rec on Account (F2)** button to display a different set of buttons.




4. Click the **Special Order Deposit (F5)** button to display the special order number entry window.

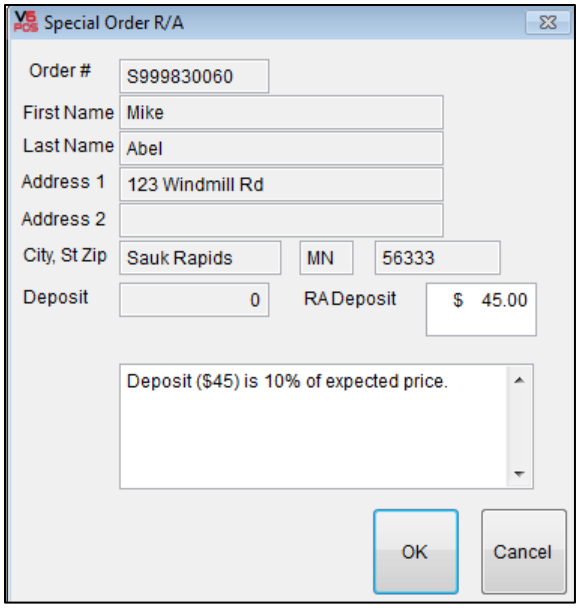



5. Complete either of the following as appropriate:

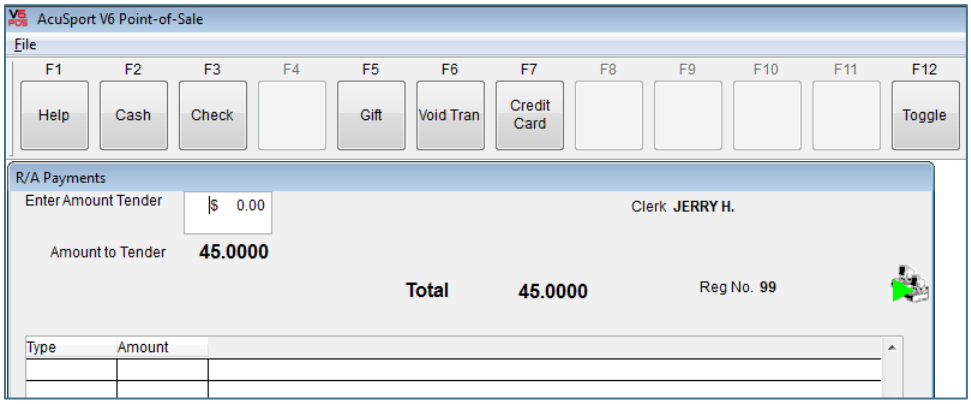
   - If creating a new special order, edit the system-generated special order number as needed.
   - If collecting a deposit for an existing special order, click the **List** button and select the appropriate special order from the list.

6. Click the **OK** button to display the **Special Order R/A** window.

   ► If the mail number entry windows appear, complete it.




7. Enter the amount of the special order deposit in the **RA Deposit** field.
8. Enter special order notes (item description, quoted price, etc.) in the large text field. These notes will print on the customer's receipt.
9. Click the **OK** button to display the **R/A Payments** window.




10. Enter the amount of the special order deposit in the **Enter Amount Tender** field.
11. Click the appropriate tender button (e.g. **Cash (F2)**, **Check (F3)**, etc.) to receive the deposit.

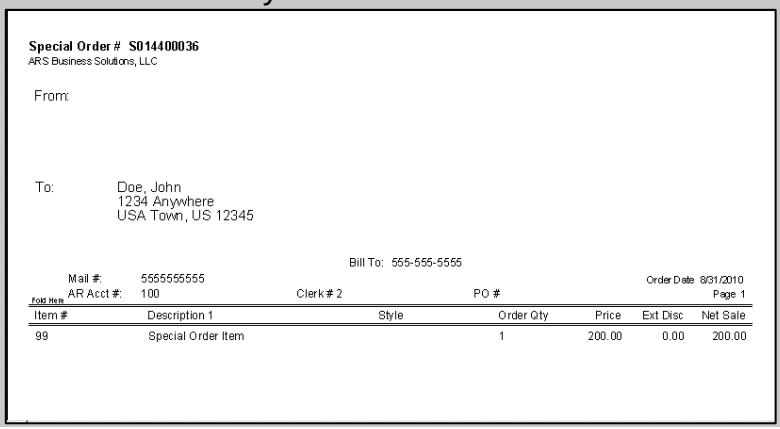
# Finalize a Special Order

Complete the following procedure to finalize the special order.

1. Receive the special order item.

   ► Once the special order item has been received at the IMS, it is ready for customer pickup. The receiving clerk will need to know the item code associated with the special order. (The store may use a generic code like '99' or it may use the actual item code depending upon the situation and store policy.)

   ► When the item was linked to the customer's special order in the IMS application, a special order sheet (a full sheet showing the item number and order details, not a register receipt) should have been printed. It may be helpful to have the receiving clerk attach the special order sheet to the item when it is received into the system.



**Special Order # S014400036**
ARS Business Solutions, LLC

From:

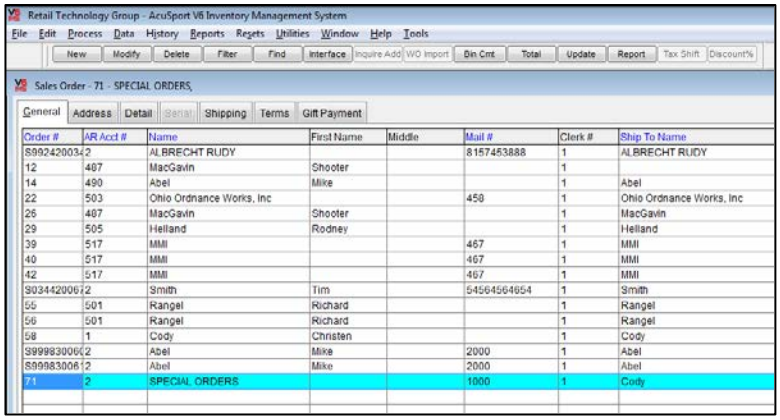
To: Doe, John
1234 Anywhere
USA Town, US 12345

Bill To: 555-555-5555

Mail #: 5555555555 Order Date 8/31/2010
AR Acct #: 100 Clerk # 2 PO # Page 1

| Item # | Description 1 | Style | Order Qty | Price | Ext Disc | Net Sale |
|---|---|---|---|---|---|---|
| 99 | Special Order Item | | 1 | 200.00 | 0.00 | 200.00 |

2. Complete the following procedure to add item information to the special order.
   1. Log in to the **IMS** application.
   2. Select **Process > Sales Order** from the menu bar to display the **Sales Order** screen.



Retail Technology Group - AcuSport V6 Inventory Management System

File Edit Process Data History Reports Resets Utilities Window Help Tools

New Modify Delete Filter Find Interface Inquire Add WO Import Bin Cmt Total Update Report Tax Shift Discount%

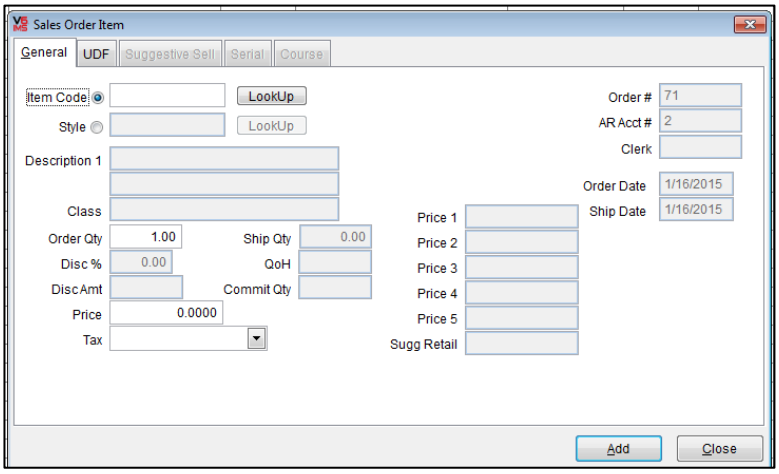
Sales Order - 71 - SPECIAL ORDERS

General Address Detail Serial Shipping Terms Gift Payment

| Order # | AR Acct # | Name | First Name | Middle | Mail # | Clerk # | Ship To Name |
|---|---|---|---|---|---|---|---|
| S992420034 | 2 | ALBRECHT RUDY | | | 8157453888 | 1 | ALBRECHT RUDY |
| 12 | 487 | MacGavin | Shooter | | | 1 | |
| 14 | 490 | Abel | Mike | | | 1 | Abel |
| 22 | 503 | Ohio Ordnance Works, Inc | | | 450 | 1 | Ohio Ordnance Works, Inc |
| 26 | 487 | MacGavin | Shooter | | | 1 | MacGavin |
| 29 | 505 | Helland | Rodney | | | 1 | Helland |
| 39 | 517 | MMI | | | 467 | 1 | MMI |
| 40 | 517 | MMI | | | 467 | 1 | MMI |
| 42 | 517 | MMI | | | 467 | 1 | MMI |
| S034420067 | 2 | Smith | Tim | | 54564564654 | 1 | Smith |
| 55 | 501 | Rangel | Richard | | | 1 | Rangel |
| 56 | 501 | Rangel | Richard | | | 1 | Rangel |
| 58 | 1 | Cody | Christen | | | 1 | Cody |
| S999830060 | 2 | Abel | Mike | | 2000 | 1 | Abel |
| S999830061 | 2 | Abel | Mike | | 2000 | 1 | Abel |
| 71 | 2 | SPECIAL ORDERS | | | 1000 | 1 | Cody |

   3. Click the special order to select it.

4. Click the **Detail** tab to display it.
5. Click the **New** button to display the **Sales Order Item** window.




6. Populate the fields to identify the special order detail.

   ► If applicable, use the non-stock item code and change the description to match the actual item description. (An actual item code may be used without needing to alter information.)

7. If the item is a serialized item, be sure to click the **Serial** tab and enter serial information.
8. Click the **Add** button to add the detail to the **Detail** tab.

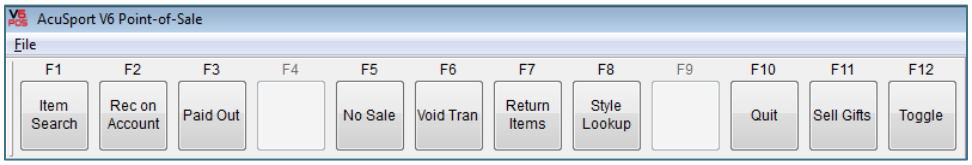
3. Log in to the **POS** application.

   ► If the FOM is not currently enabled, enable it now.

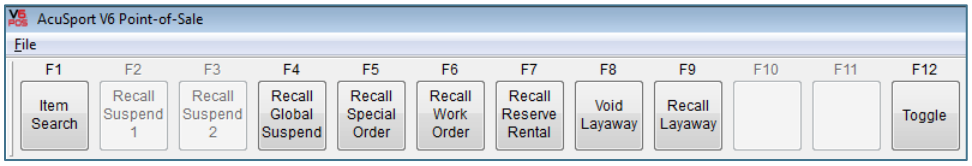
   ► If the **F11** button is labeled "**Go Online**," click it to send the POS online. (If it is labeled "**Go Offline**," the POS is already online.)

4. If needed, click the **Point-of-Sale (F2)** button to display the set of buttons shown below.

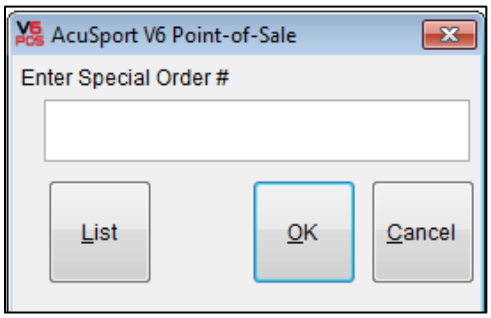
   ► If other windows (PIN entry, etc.) appear, complete or cancel them as appropriate.




5. Click the **Toggle (F12)** button twice to display the recall buttons.



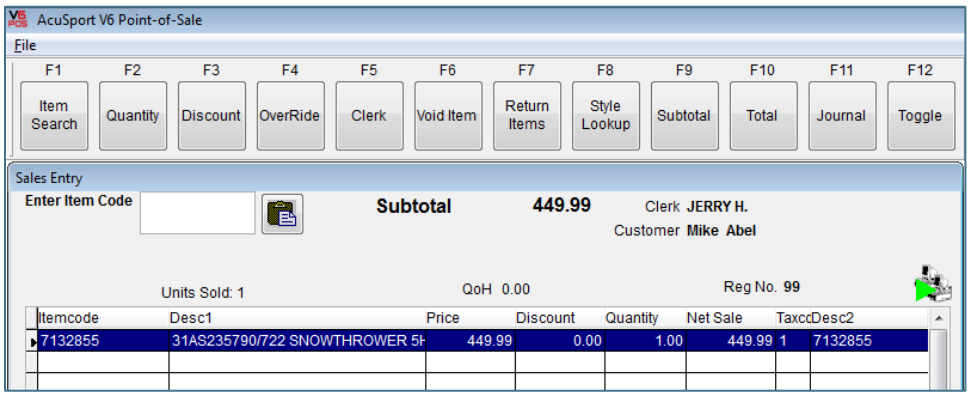
6. Click the **Recall Special Order (F5)** button to display the special order number entry window.




7. Enter the special order number in the **Enter Special Order #** field (or click the **List** button and select the special order from the list).

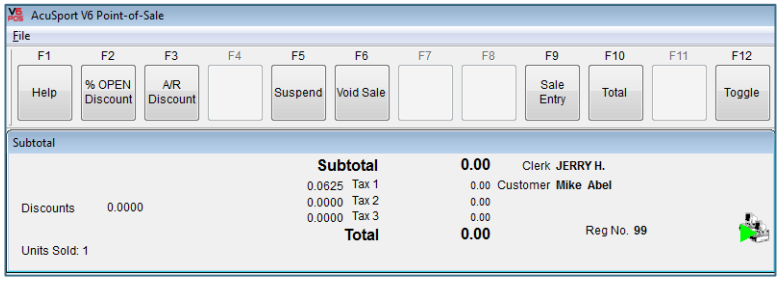
   ► The special order number is printed on the customer's receipt.

8. Click the **OK** button to display the **Sales Entry** window.



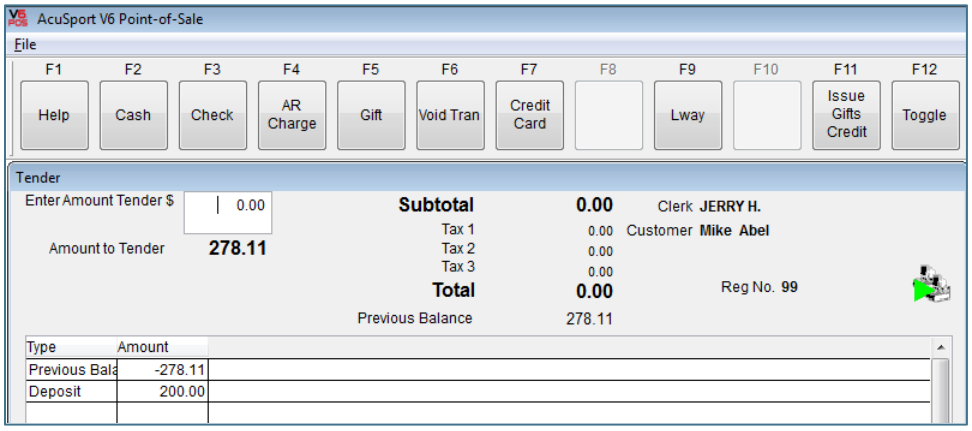

9. If desired, complete the following procedure to add items to this transaction:
   1. Add the additional item(s).
   2. Click the **Subtotal (F9)** button to display the **Subtotal** window.

      ► The **Subtotal** window does not include the amount due for the special order.




10. Click the **Total (F10)** button to display the **Tender** window.

► The **Tender** window displays the amount due for the special order (and any recently added items). The list displays the balance due and total deposits paid for the special order.




11. Enter the amount due in in the **Enter Amount Tender** field.
12. Click the appropriate tender button (e.g. **Cash (F2)**, **Check (F3)**, etc.) to complete the transaction.

# Cancel a Special Order

Complete the following procedure to cancel a special order.

1. Log in to the **POS** application.

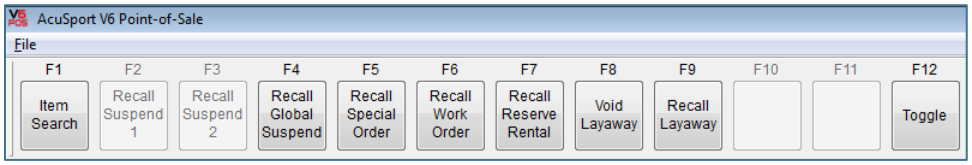
   ► If the FOM is not currently enabled, enable it now.

   ► If the **F11** button is labeled "**Go Online**," click it to send the POS online. (If it is labeled "**Go Offline**," the POS is already online.)

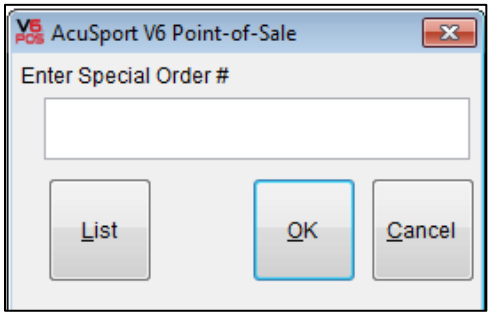
2. If needed, click the **Point-of-Sale (F2)** button to display the set of buttons shown below.

   ► If other windows (PIN entry, etc.) appear, complete or cancel them as appropriate.

3. Click the **Toggle (F12)** button twice to display the recall buttons.




4. Click the **Recall Special Order (F5)** button to display the special order number entry window.

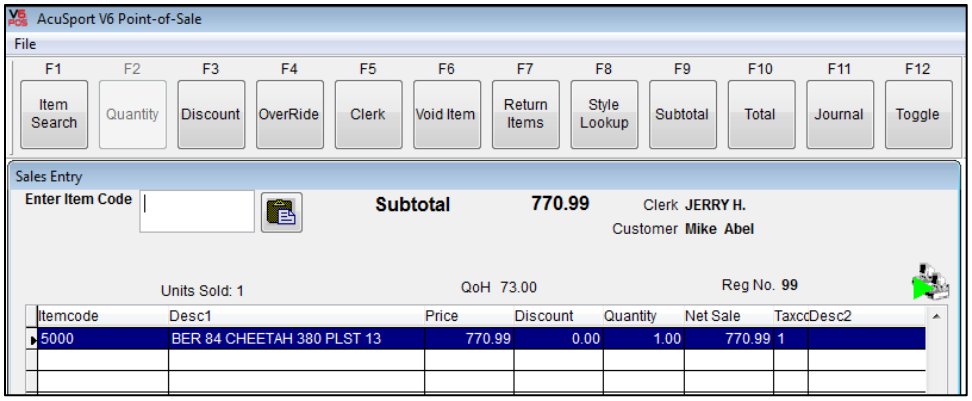



5. Enter the special order number in the **Enter Special Order #** field (or click the **List** button and select the special order from the list).

   ► The special order number is printed on the customer's receipt.

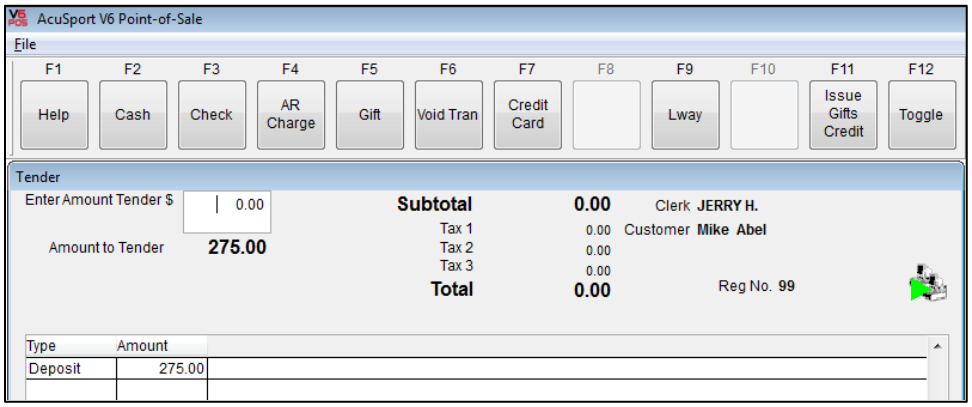
6. Click the **OK** button to display the **Sales Entry** window.

   ► If other windows (Serial Info, etc.) appear, complete or cancel them as appropriate.




7. Void all transaction items to remove them from the **Sales Entry** window.
8. Click the **Subtotal (F9)** button to display the **Subtotal** window.
9. Click the **Total (F10)** button to display the **Tender** window.

► The **Tender** window displays the amount due for the special order (and any recently added items). The list displays the balance due and total deposits paid for the special order.

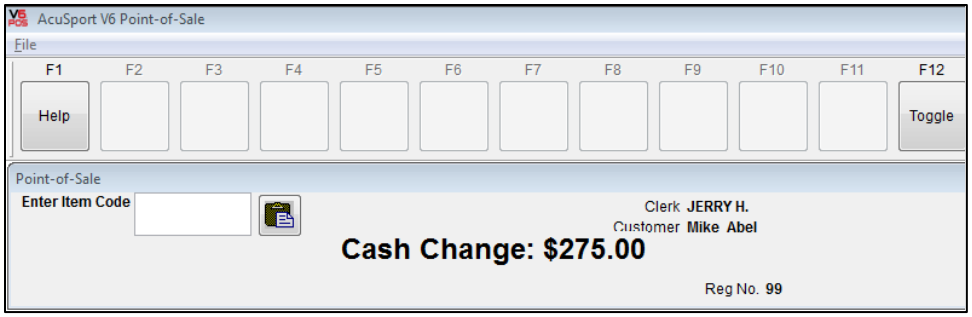



10. Complete one of the following procedures as appropriate to issue a refund:
    - Refund the Entire Deposit Amount with No Restocking Fee
    - Refund the Deposit Minus a Restocking Fee (Item Code)
    - Refund the Deposit Minus a Restocking Fee (Tender Key)

## Refund the Entire Deposit Amount with No Restocking Fee

1. Click the **Cash (F2)** button to display the **Point-of-Sale** window.

► The window displays the amount to be refunded (total deposit).



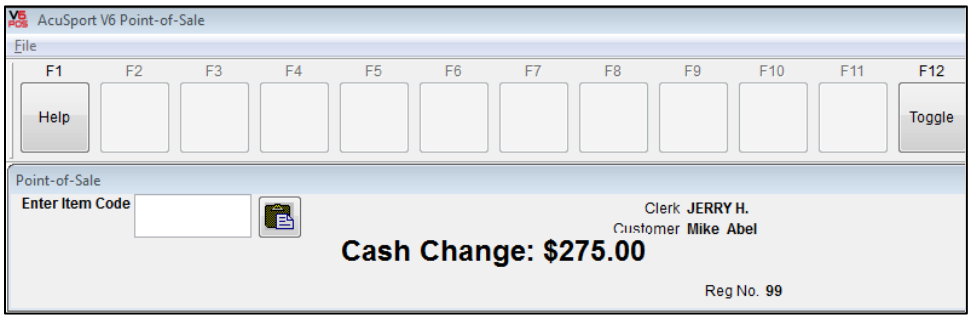

2. Issue a refund in the amount shown.

## Refund the Deposit Minus a Restocking Fee (Item Code)

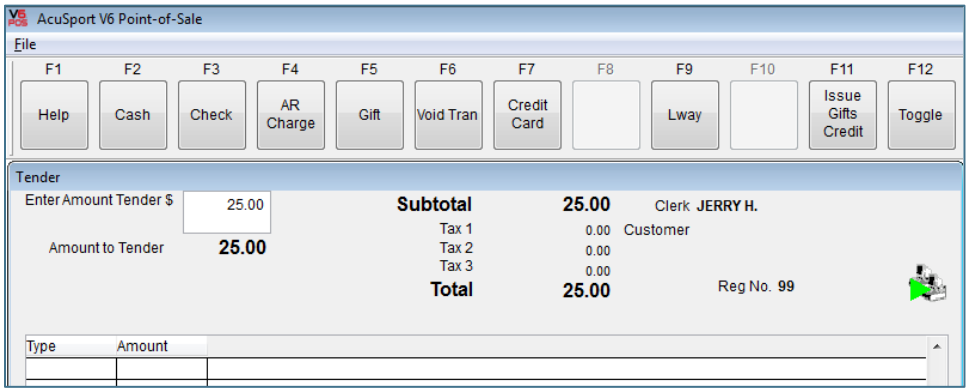
► Refer to Create a Restocking Fee Item Code for more information.

1. Click the **Cash (F2)** button to display the **Point-of-Sale** window.

   ► If the PIN entry and mail number entry windows appear, complete them.



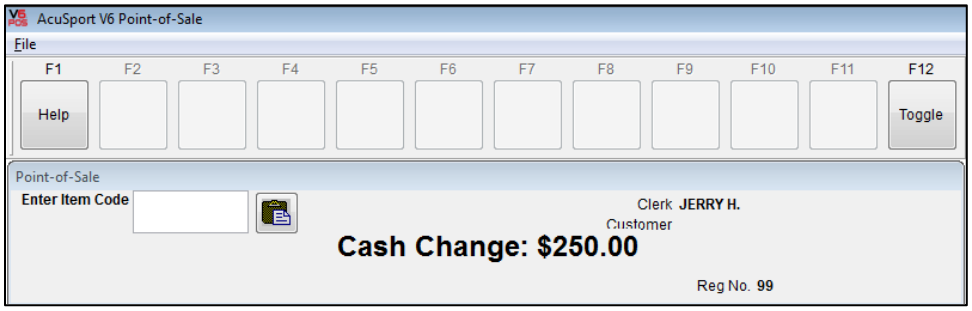

2. Remember the change amount shown in the window for future reference.
3. Enter the restocking fee item code in the **Enter Item Code** window.
4. Press the **Enter** key to add the fee to the list on the **Sales Entry** window.
5. Click the **Total (F10)** button to display the **Tender** window.




6. Enter the change amount (from the **Point-of-Sale** window) in the **Enter Amount Tender** field.

7. Click the **Cash (F2)** button to display the **Point-of-Sale** window.

   ► The window displays the amount to be refunded (total deposit minus the restocking fee).




8. Issue a refund in the amount shown.

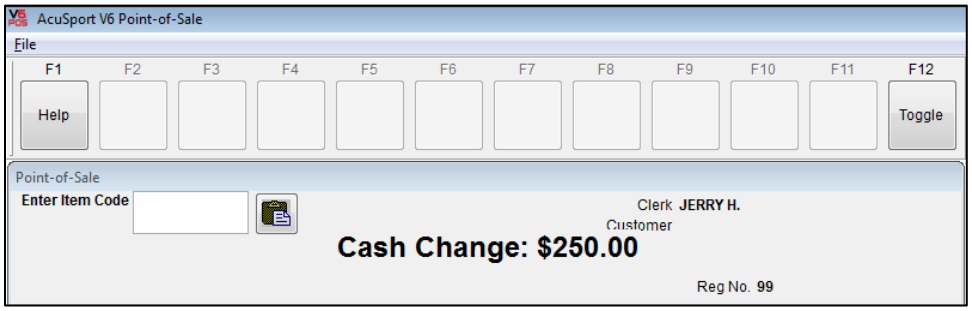
## Refund the Deposit Minus a Restocking Fee (Tender Key)

► Refer to Create a Restocking Fee Tender Key for more information.

1. Click the **Toggle (F12)** button as needed to display the **Restocking Fee** tender key (button).

2. Enter the amount of the restocking fee in the **Enter Amount Tender** field.
3. Click the **Restocking Fee** button to add the fee to the list in the **Tender** window and update the amount shown in the **Amount to Tender** field.
4. Click the **Cash (F2)** button to display the **Point-of-Sale** window.

   ► The window displays the amount to be refunded (total deposit minus the restocking fee).




5. Issue a refund in the amount shown.

# Correct a Special Order Issue

Complete the following procedure as needed to correct a special order that was incorrectly recalled and finalized (cashed out).

1. If the transaction was voided after the special order was finalized, complete the following procedure to correct the special order AR account:

   ► If the transaction was NOT voided after the special order was finalized, proceed to the next step.

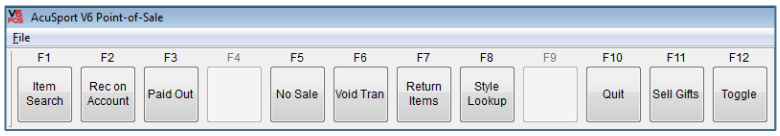
   1. Log in to the **POS** application.

      ► If the FOM is not currently enabled, enable it now.

      ► If the **F11** button is labeled "**Go Online**," click it to send the POS online. (If it is labeled "**Go Offline**," the POS is already online.)

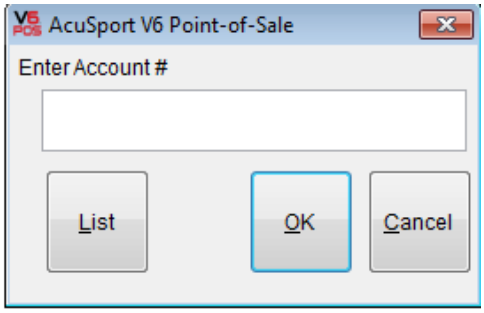
   2. If needed, click the **Point-of-Sale (F2)** button to display the set of buttons shown below.

      ► If other windows (PIN entry, etc.) appear, complete or cancel them as appropriate.



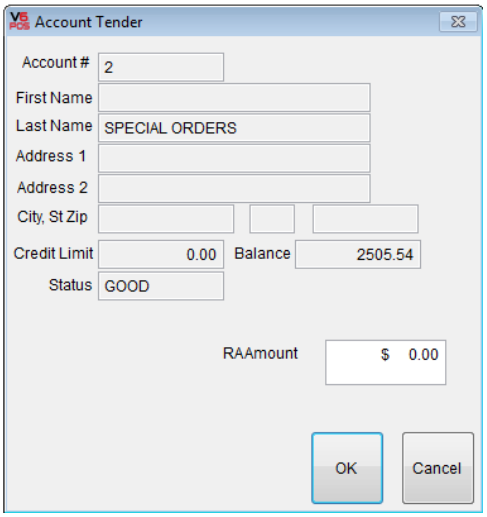

   3. Click the **Rec on Account (F2)** button to display a different set of buttons.

   4. Click the **AR Charge (F4)** button to display the account number entry window.




   5. Enter the special order AR account number in the **Enter Account #** field (or click the **List** button and select the account from the list).

   6. Click the **OK** button to display the **Account Tender** window.




7. Enter the deposit amount in the **RA Amount** field and press the subtraction (**-**) key to make the amount negative.
8. Click the **OK** button to display the **R/A Payments** window.
9. Click the appropriate tender button (e.g. **Cash (F2)**, **Check (F3)**, etc.) that was used to finalize the transaction.

2. Recreate the special order.

► Refer to Create a Special Order for more information.