QuickStart Guide

Billing Special Orders

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BillingSpecial Orders

ARKONA QuickStart Guide

Use this QuickStart Guide for help billing filled special orders.

- Special orders flow through the system as follows:
    1. The special order invoice is created and closed.
    2. The cashier takes the special order deposit.
    3. The parts are placed on a stock order.
    4. The parts are received on the stock order.
    5. The customer is notified the special order parts have arrived.
    6. The customer picks up the part and the invoice is closed.
- When the customer returns to pick up the parts, take the following steps:

1. Start a new invoice using your counterperson ID.

a. Take option **1=Parts Transactions** from the Parts Inventory & Invoicing menu.

b. Key in your counterperson password and hit [FIELD EXIT].

2. Locate the original special order invoice.

- Filled special orders can be located in 3 ways.
    1. Use function **61=Retrieve Special Orders** to search through the special orders by:
        a. Customer name
        b. Counter person name
        c. Date
        d. Special order status, e.g., filled, backordered, to order, etc.
        e. Part number
        f. Stock number
    2. Use function **63= Retrieve Spec Ord by Part** to search through the special orders by part number.
    3. Select the customer on the invoice and use function **64=Customer Special Orders** to see all of the special order parts for that customer.

3. **Retrieve the parts to the Parts Transactions screen.**
   a. Take option **1=Select** by the customer name or part numbers.
      - If the order status is 'Incomplete' you can take option **3=Detail** from the Special Orders screen to display the parts on order and take option **1=Select** by all of the parts in a 'Filled' status.
      - Any unpaid portion will show due.
4. **Add comments if necessary.**
   a. Use function **23=Comments** to put comments after each part or at the bottom of the list of parts.
5. **Close the invoice.**
   a. Use function **90=Cashier** to close.