



QuickStart Guide

Canceling Special Orders

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Canceling Special Orders

ARKONA QuickStart Guide

Use this QuickStart Guide to learn how to handle special orders where the parts are canceled or discontinued. There are 9 different scenarios described below.

- Special order is created with a deposit and sent to the cashier, but the **customer decides not to purchase the part before** the original invoice is closed.
 1. Use function **94=Retrieve from Cashier** to display the parts invoices on the cashier screen.
 2. Position to the customer name and take option **1=Select** by the customer name to retrieve the invoice into the Parts Transaction screen.
 3. Take option **4=Delete** by the part number.
 - a. The message 'Part PART# deleted by CPID Total: \$\$.\$\$' replaces the part number on the invoice.
 - b. The charge for the special order part is removed from the invoice.
 4. Use function **90=Cashier** to close the invoice.

- Customer does not pay a deposit, the part is ordered, but **the factory indicates the part is no longer available**.
 1. Take option **11=Stock Orders** from the Parts Inventory & Invoicing menu.
 2. Take option **8=Receive** by the stock order with the discontinued part.
 3. Take option **4=Discont** by the part number.
 4. Take option **61=Retrieve Special Orders** from the Parts Transactions screen and position to the customer name.
 - a. The status of the order is 'Incomplete'
 5. Take option **1=Select** by the part invoice to retrieve it to the Parts Transactions screen.
 - a. The message 'Part PART# Discontinued' is placed on the invoice.
 6. Use function **90=Cashier** to close the invoice.

- Customer pays a deposit, the part is ordered, but **the factory indicates the part is no longer available**.
 1. Take option **11=Stock Orders** from the Parts Inventory & Invoicing menu.
 2. Take option **8=Receive** by the stock order with the discontinued part.
 3. Take option **4=Discont** by the part number.
 4. Take option **61=Retrieve Special Orders** from the Parts Transactions screen and position to the customer name.
 - a. The status of the order is 'Incomplete'.
 5. When the customer comes in to get back their deposit, take option **61=Retrieve Special Orders**, position to the customer name, and take option **1=Select** by the order to retrieve the invoice to the Parts Transactions screen.
 - a. The message 'Part PART# Discontinued' is placed on the invoice with the special order deposit credit.
 6. Use function **90=Cashier** to close the invoice as a credit to the cash drawer.
 - a. The cashier may then give a cash refund or have the office write a check and charge it to the cash drawer account.

- **Customer does not pay a deposit** and calls back and cancels their order **before it is placed on order**.
 1. Take option **61=Retrieve Special Orders** from the Parts Transactions screen.
 2. Position to the customer name and take option **3=Detail** by the customer name to display the parts on the invoice.
 3. Take option **4=Delete** by the part numbers and press [ENTER] to confirm.
 4. Use function **F12=Cancel** to return to the Customer Special Orders list. The order drops off the special order list

- **Customer pays a deposit** and calls back and cancels their order **before it is placed on order**.
 1. Take option **61=Retrieve Special Orders** from the Parts Transactions screen.
 2. Position to the customer name and take option **3=Detail** by the customer name to display the parts on the invoice.

3. Take option **4=Delete** by the part numbers and press [ENTER] to confirm.
 4. Use function **F12=Cancel** to return to the Customer Special Orders list.
 - a. The order status changes to Filled.
 5. Use function **F12=Cancel** again to return to the Parts Transactions screen.
 6. When the customer comes in to get back their deposit, take option **61=Retrieve Special Orders**, position to the customer name, and take option **1=Select** by the order to retrieve the special order deposit credit to the Parts Transactions screen.
 7. Use function **90=Cashier** to close the invoice as a credit to the cash drawer.
 - a. The cashier may then give a cash refund or have the office write a check and charge it to the cash drawer account.
- **Customer does not pay a deposit and calls back and cancels *after the part is placed on order, but before the part is received.***
 1. Take option **61=Retrieve Special Orders** from the Parts Transactions screen.
 2. Position to the customer name and take option **3=Detail** by the customer name to display the parts on the invoice.
 3. Take option **4=Delete** by the part numbers and press [ENTER] to confirm.
 4. Use function **F12=Cancel** to return to the Customer Special Orders list.
 - a. The order drops off the special order list
 5. Use function **F12=Cancel** to return to the Parts Transactions screen.

- **Customer pays a deposit** and calls back and cancels **after the part is placed on order, but before the part is received.**
 1. Take option **61=Retrieve Special Orders** from the Parts Transactions screen.
 2. Position to the customer name.
 - a. The status of the order is 'Incomplete'
 3. Take option **3=Detail** by the customer name to display the parts on the invoice.
 4. Take option **4=Delete** by the part numbers and press [ENTER] to confirm.
 5. Use function **F12=Cancel** to return to the Customer Special Orders list.
 - a. The status of the order changes to 'Filled'.
 6. When the customer comes in to get back their deposit, take option **61=Retrieve Special Orders**, position to the customer name, and take option **1=Select** by the order to retrieve the special order deposit credit to the Parts Transactions screen.
 7. Use function **90=Cashier** to close the invoice as a credit to the cash drawer.
 - a. The cashier may then give a cash refund or have the office write a check and charge it to the cash drawer account.

- **Customer does not pay a deposit** and calls back and cancels **after the part is received**
 1. Take option **61=Retrieve Special Orders** from the Parts Transactions screen.
 2. Position to the customer name.
 - a. The status of the order is 'Filled'.
 3. Take option **1=Select** by the customer name to retrieve the invoice to the Parts Transactions screen.
 4. Use function **F14=Delete** to delete the invoice and place the special order parts back in inventory.

- **Customer pays a deposit** and calls back and cancels **after the part is received**
 1. When the customer comes in to get back their deposit, take option **61=Retrieve Special Orders**, position to the customer name, and

take option **1=Select** by the order to retrieve the special order deposit credit to the Parts Transactions screen.

2. Take option **4=Delete** to remove the parts from the invoice and leave the special order deposit credit.
3. Use function **90=Cashier** to close the invoice as a credit to the cash drawer.
 - a. The cashier may then give a cash refund or have the office write a check and charge it to the cash drawer account.