Customer Order Overview

The Customer Order module is designed to accommodate types of sales not generally associated with "walk-in" customers. This should not be confused with Special Orders, which are taken via the Cash Register module. Customer Order sales may come from any number of sources such as phone, fax, email, or an AWS web site. These types of sales require more information than is supplied in the Cash Register interface. Additional fields for billing and shipping information, invoicing information, printing options, and even special handling of deposits, are available in Customer Order module.

Because of additional information requirements, the CO screen is separated into three tabbed pages: List, Header, and Details. The Header tab is an expanded customer information section (e.g. "Who", "When" and "Where" information). The Details tab shares basic customer information with the Header tab, however, this section also contains detailed information about the individual sale items (e.g. What items, How Many, and at What Price).

Much of the screen information is derived from other modules (i.e. Inventory, Customer, Taxes, etc.). Sometimes this information can be cascaded from those original files while other times the information will need to be manually entered. It is a good idea to be familiar with Customers, Taxes, and the Options screen defaults. Knowing these screens will help in understanding the behaviors of the Customer Order module.

Customer Orders may exist in one of four states or "statuses". These are Draft, Open, Shipment, and Complete.

- •Draft: These orders are works in progress (not posted). They have no bearing on system data such as on-hand or on-order quantities.

- •Open: These are orders that have been posted but are not yet completed. Such orders may have been posted but not yet shipped; or a shipment may have been made that did not complete the order (e.g. backordered items). Customer Orders may also be posted without shipping. This results in an open Customer Order (e.g. You could post an order to receive payment but want to delay shipping).

- •Shipment: Each time you ship, a shipment document is created. On some orders, a single shipment completes the order. In such cases, only a single shipment document is associated with the original order. Other orders may take two or more shipments to complete and will have multiple shipment documents associated. Every Customer Order where items have been shipped, will have an accompanying shipment record.

- •Complete: When all items on an order are either shipped or canceled, the order is marked as completed. These records are historical documents; they may not be edited or deleted.

When used in conjunction with AWS, orders are generated automatically when a download is processed from the web site. These orders are left in draft mode so edits may be made prior to posting