Tech Procedures (Special Orders)

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Special Order Process

Please refer to the warehouse receiving SOP of "What is a Special Order?"

The process below is the process one would do when they are getting ready to charge the order out!

While the SOP that warehouse uses special orders is like the process of what E-Tech does. What E-Tech is responsible for is double checking that the technology products are ready to go for delivery! How we do that is by when warehouse passes over the items to use, we check based on the sku, or catalog of the item is correctly serialized. Sometimes there will be items that wouldn't need serialization, but that is a different area of tech that we will get into later.

Firstly, starting with the process of checking if the Technology item is ready to be charged out and delivered, we must check the item.

Step 1: If warehouse has done the steps correctly you should see a label on the item stating its corresponding FileMaker quote

For example, on the label it should say something like:

"CSQ26546 – CAMPUS IT DEP"

OR IF; it was a special order that is for a customer it would say:

"CSQ26465 – MILES O"

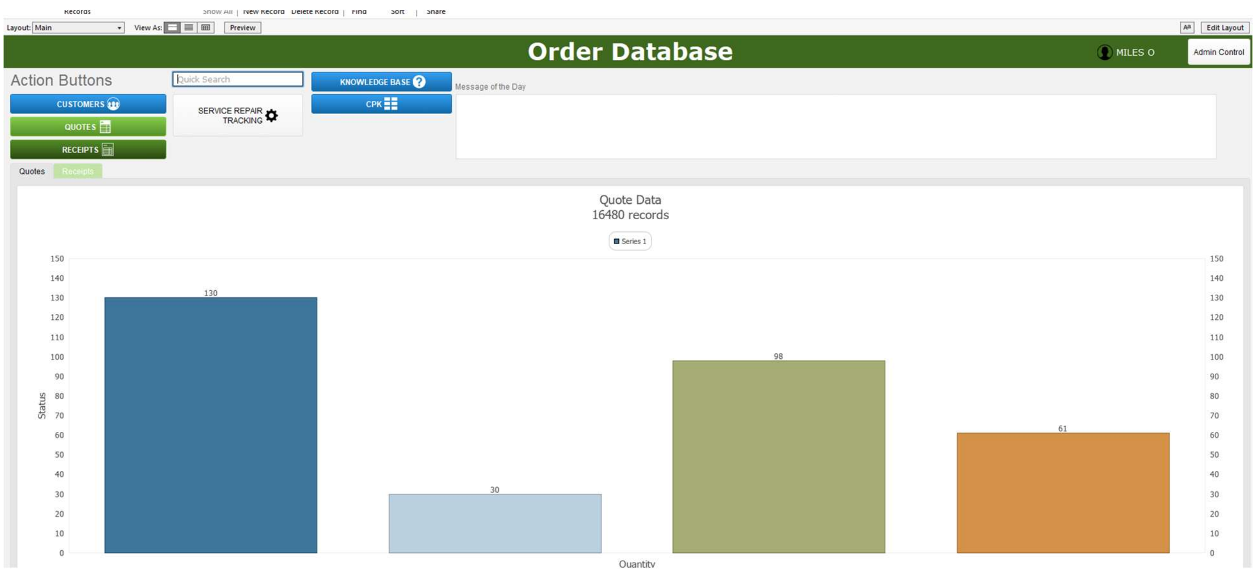
As for merch/ apparel it's the same concept

Depending on whether or warehouse should have handed you

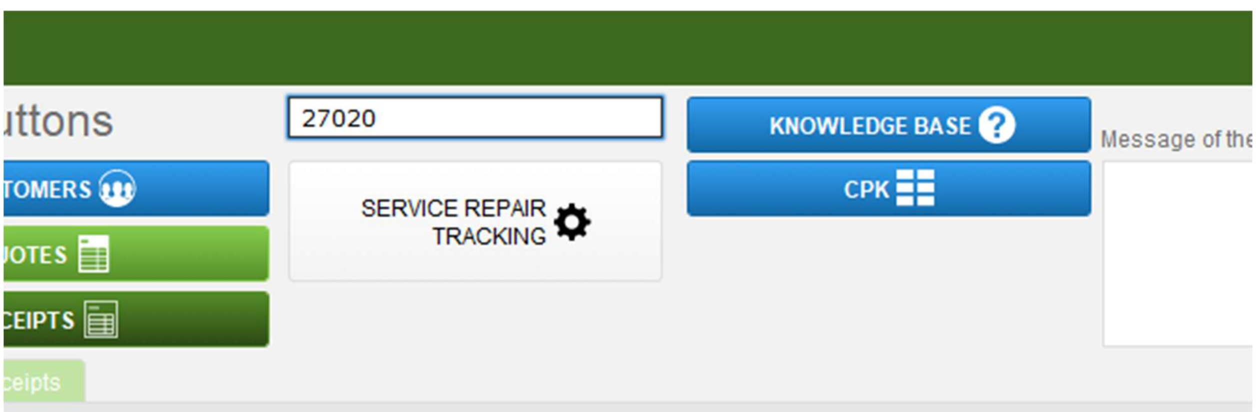
over ONLY tech special orders unless said differently from the higher ups.

Step 2: After you have verified that item is a special order, you must sign into FileMaker Pro and click the option "Order Database," and sign in.

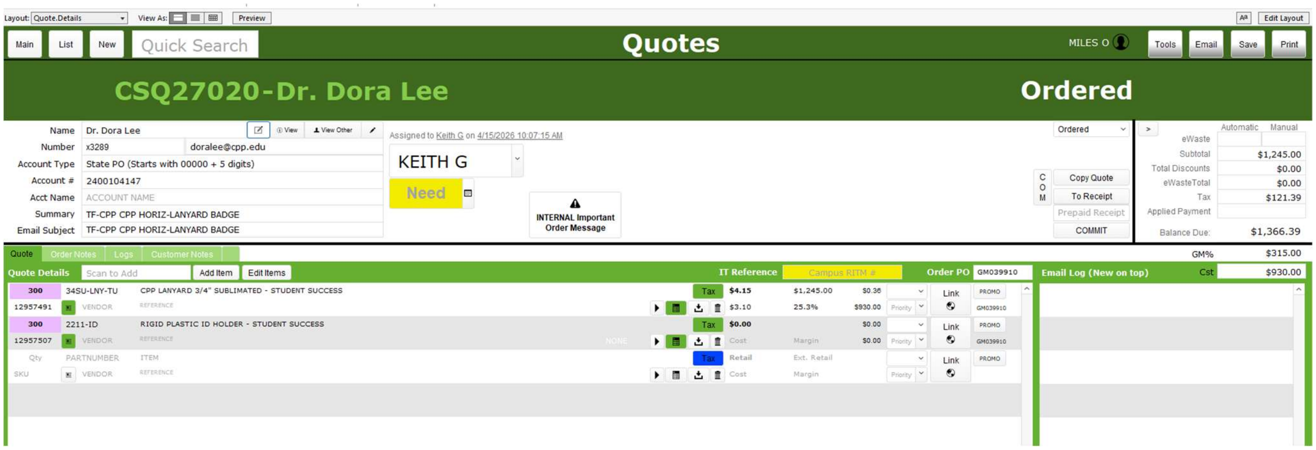
Step 3: You screen should now look like this:



During this step simply using the label on the item that states its CSQ number you just want to add the numbers into the "Quick Search" bar.

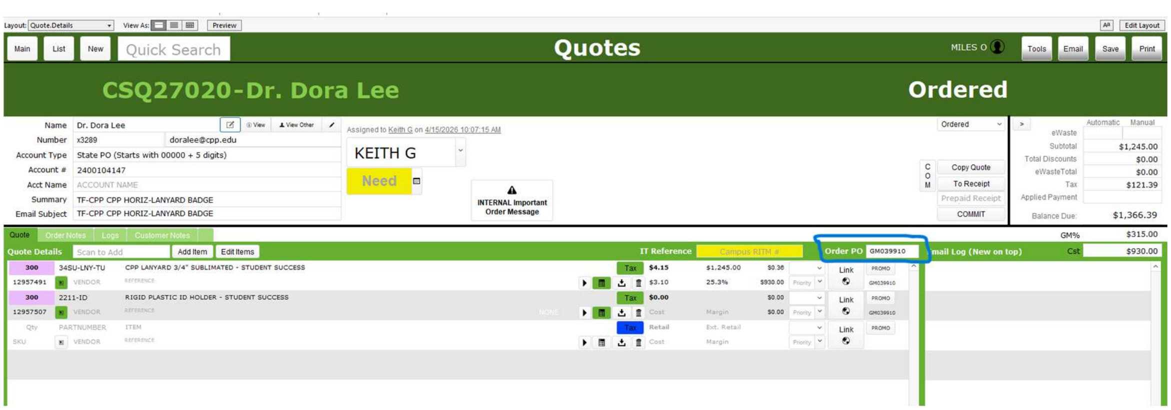


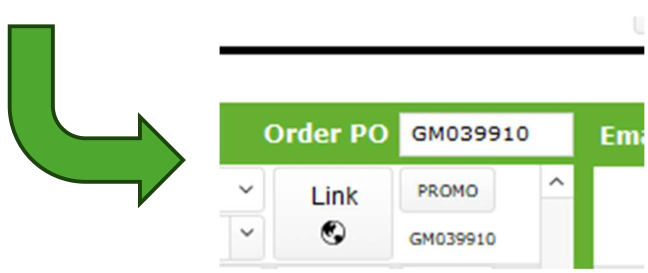
After you have typed and clicked enter, your screen should now look like this:



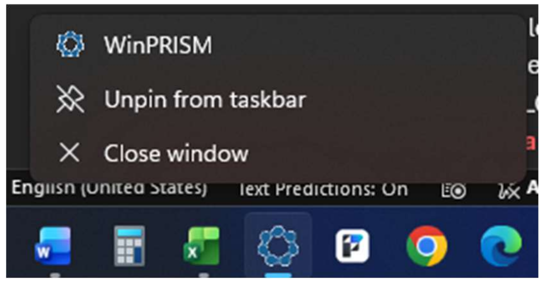
Step 4: Once on the screen above please look to the middle right where it has a small box that says “Order PO” this is where you will look on Win Prism under the Purple tab or in other words in 301. Why would you look there is because as said before if warehouse did their job correctly the GM/PO will state “CLOSED,” and a part of the process for charging out is **we CAN NOT charge items out IF they are not RECEIVED IN 301**, UNLESS SAID DIFFERENTLY FROM HIGHER UPS.

Images below are where the “Order PO” is within the quote screen:

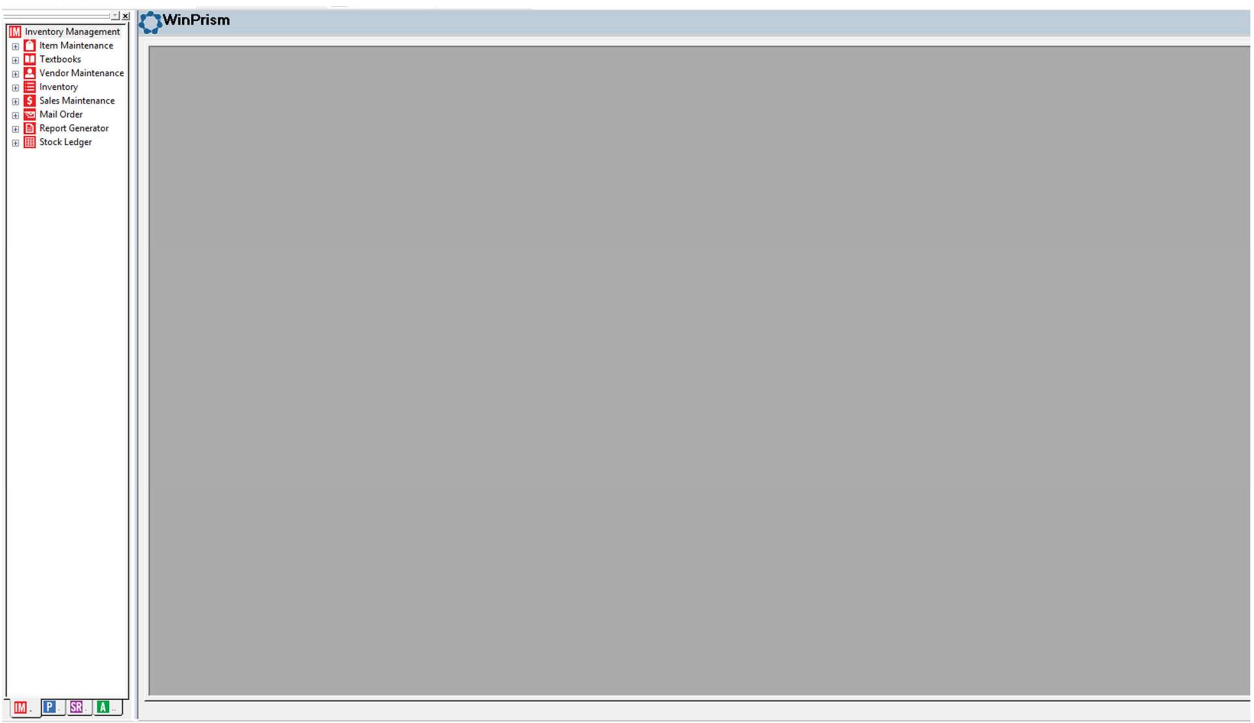




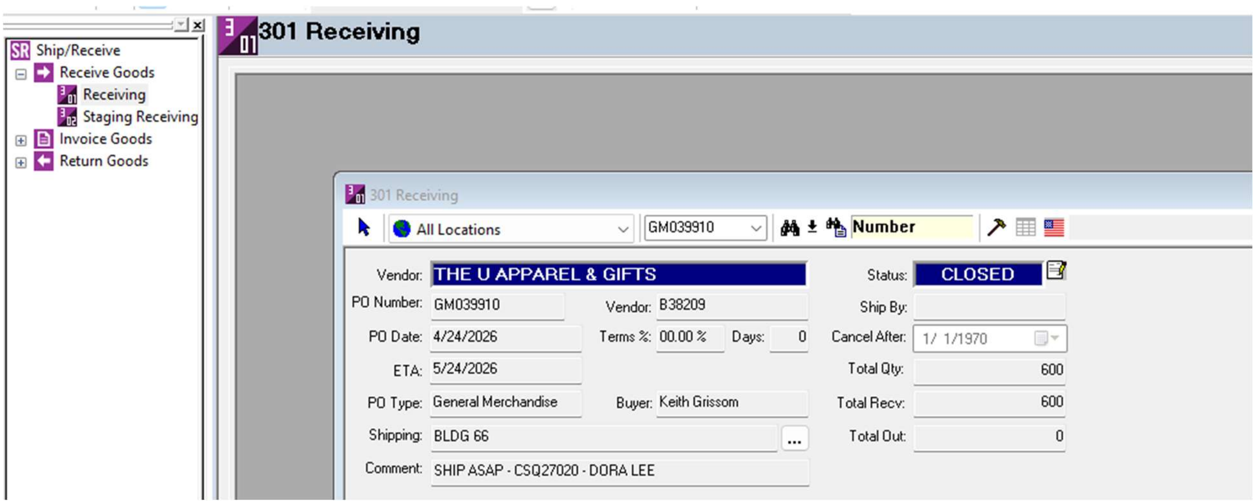
Step 5: Now that you have found the “Order PO” section, please copy and paste the GM inside for refence a GM would look like this “GM039910.” Once you have the GM copied you want to login into Win Prism



After you have logged in with your credentials your screen should now look like this in Win Prism:



As stated, before we want to check in the Purple Tab or in other words 301 to check if the items that are listed on the File Maker quote match how many was received in 301 and for this instance we have copied, or we are using this GM “GM039910.” Below is the image with the GM listed in the search bar within 301

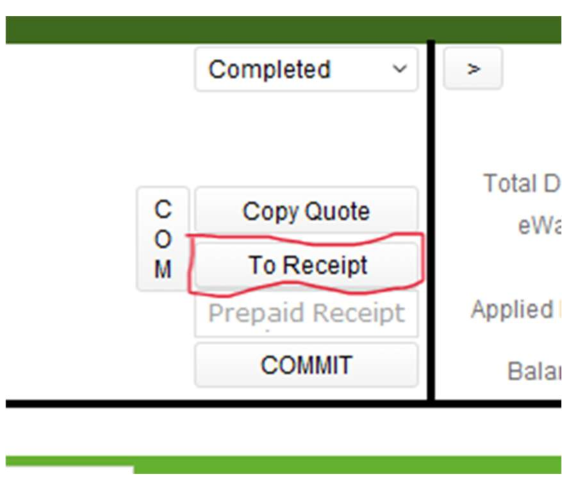


Now that you have the GM shown on the screen, we want to make our attention to the “RCV” column and make sure that BOTH “REQUEST” AND “RCV” match

Link	Location	Sy	O	SKU	Cat #/ISBN	Description	Ti	Term	Request	Out Qty	Rcv	Can Qty	BO Qty	D
	BRONCO BO	GM		12957491	34SU-LNY-TU	CPP LANYARD 3/4" SUBLIMATED - STUDE	/4	Non-Term	300	0	300	0	0	
	BRONCO BO	GM		12957507	2211-ID HOLDER-TU	RIGID PLASTIC ID HOLDER - STUDENT SUC	RI	Non-Term	300	0	300	0	0	

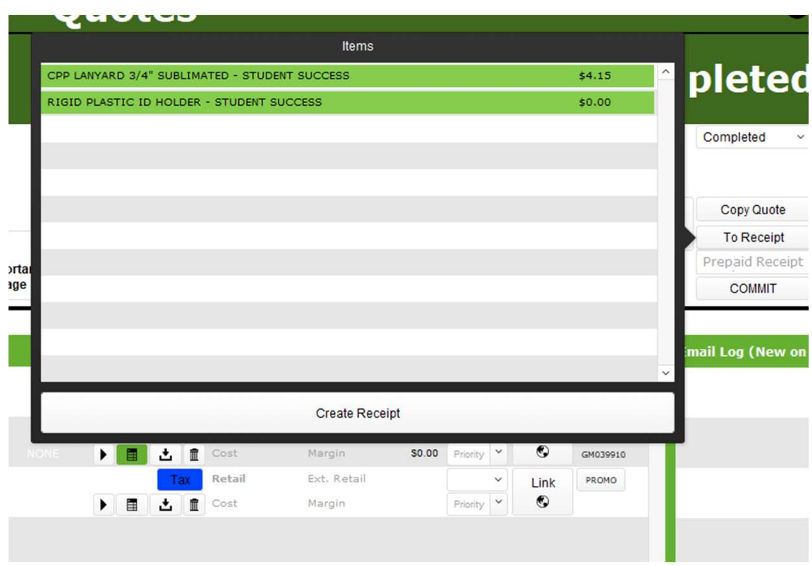
IF THEY DO MATCH YOU ARE NOW READY TO DO NEXT STEP

Step 6: After checking in Win Prism for if the items we are trying to find for the special order and getting it ready to charge out, please switch back to File Maker, where you will create what we call a “Receipt” for the special order. The images below display the “To Receipt” button in red, this button is where you will create the receipt

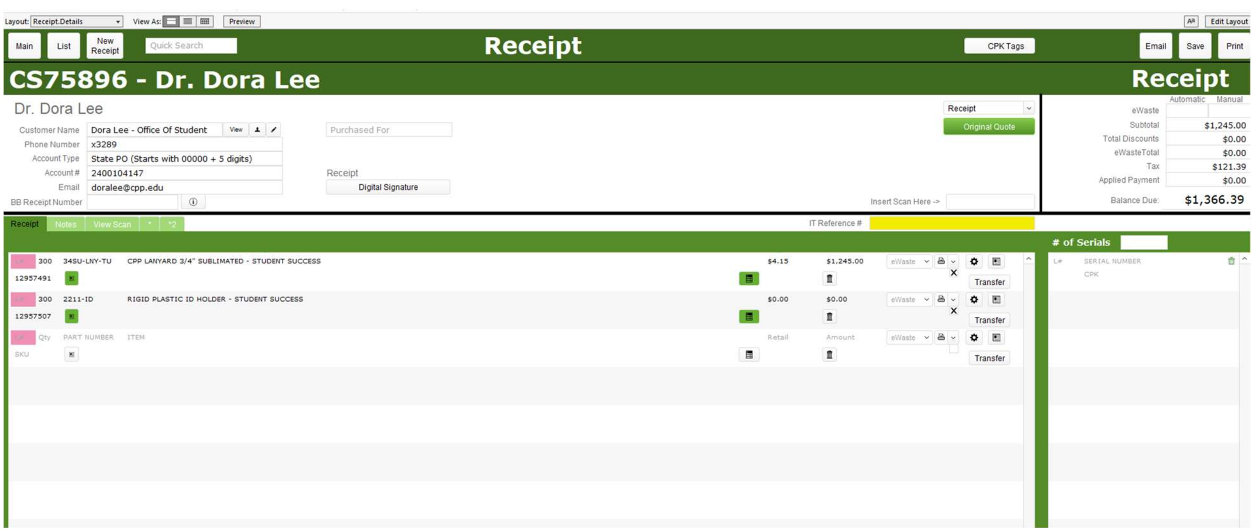


After you have clicked the “To Receipt" button you should then see this pop up

After the “To Receipt” pop up PLEASE MAKE SURE YOU HAVE CLICKED AND TURN THE ITEMS GREEN JUST LIKE THE IMAGE OF THE ITEMS YOU HAVE SELECTED TO BE CHARGED OUT DEPENDING ON WHAT IS RECEIVED; **After you have clicked on the items you want to charge out you can now clicked the “Create Receipt” button**



Step 7: After clicked the “Create Receipt" button your screen should now look like the image below:



Before printing the special order out so you can have it ready for the customer to sign you MUST ALWAYS CHECK THE AMOUNTS MATCH in both the RECEIPT screen AND the QUOTE screen

Step 8: By checking both amounts we are making sure that the special-order quote is correct, the reason as to why we double check the prices is because the customer depends on how they pay it can affect the amount.

What this means is that

State Accounts/POs are project codes that have a PO approved amount from whichever financial service is requested.

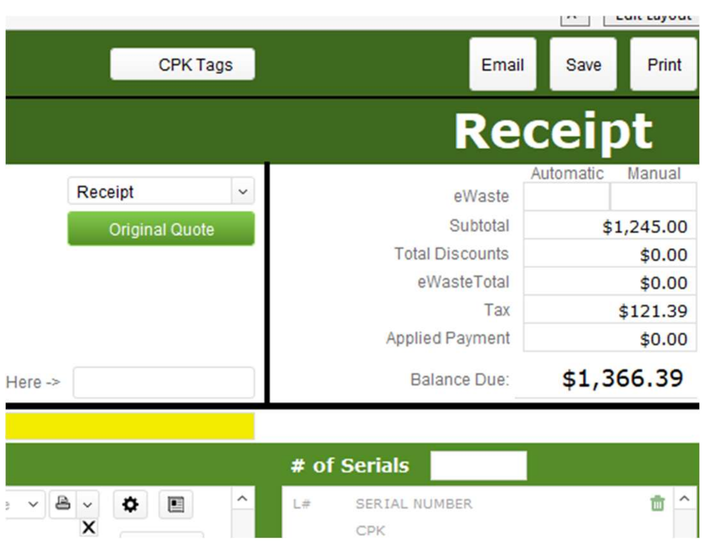
For example: Many clothing and CAMPUS IT special orders are state POs, where Keith would be the one to finalize the account as well as give you the go ahead if the project code is code to be charged out.

The only difference between CAMPUS IT and clothing special order project code is that clothing special orders use account "State Procurement" whereas CAMPUS IT will use "UNIV PO DEP" which uses a RITM#00XXXXX"

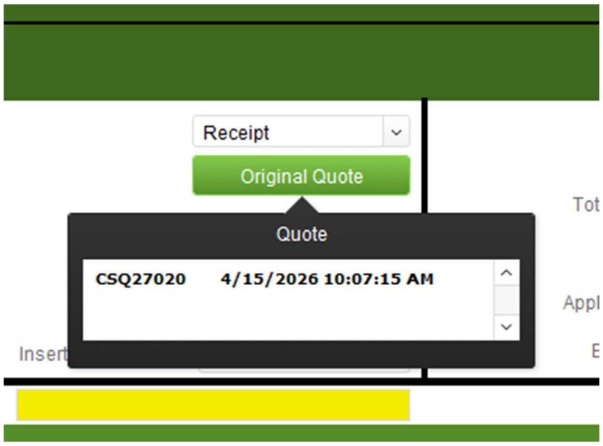
Now Grants, ASI, Foundation/Philanthropic are a kind of the same but not really, if you were to put it on a scale of which one is the easiest to charge out Foundation or Philanthropic would be on top. Why is because since we work for Foundation, the go ahead to charge things out is kind of waived because Bronco Bookstore is Foundation and say the special order we are charging out is for another Foundation subsection of campus (Ex. Farm Store, Vista, The Village, Elements, etc.)

Whereas a GRANT, ASI have a different process they if a customer is paying with a Grant/ ASI they must get approval from both where whatever sub section of the campus is as well as they must go through Keith so then he can create the account and all that fun accounting stuff.

Leading back to checking the prices, how do that is to simply look at the number on the receipt screen and the quote screen. Below is a close of where the total price is displayed in the receipt screen.



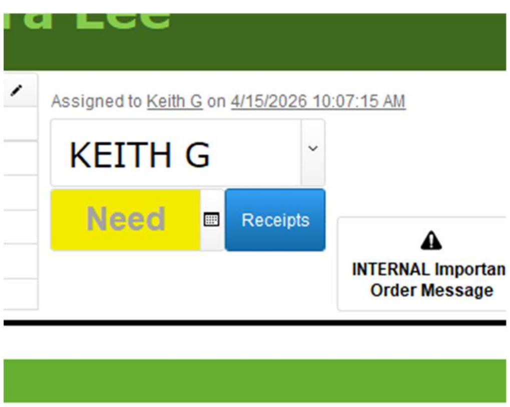
Now how to get into the Quote screen next to the total price of the receipt you should see a button that says “Original Quote” click it and a pop up will look like this:



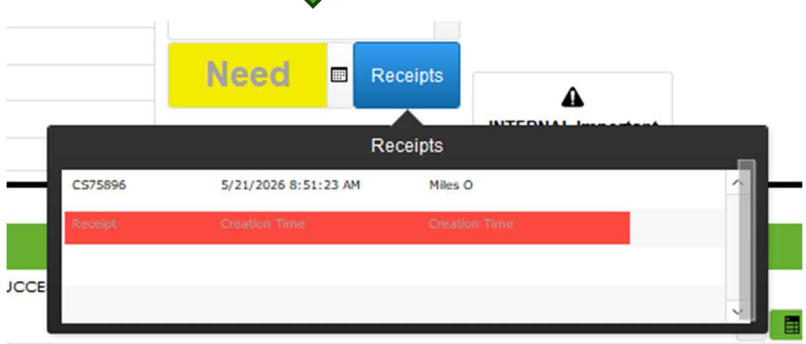
To get back to the “Original Quote” simply just price that section that says the “CSQ” and it should then lead you back to the original screen of the quote

Step 9: You have now clicked on both screens to see if the totals match, hopefully they do if not you can ask someone who you know is knowledgeable about Special Order quotes.

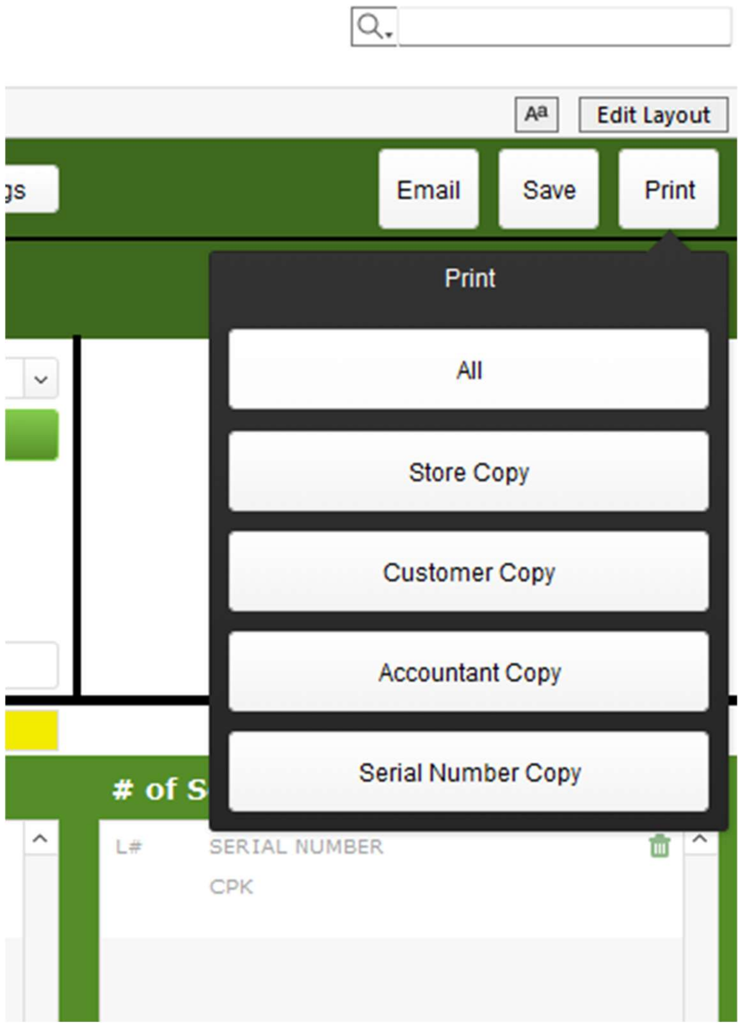
Now a lot of people get stuck during this part because they don’t know how to get back to the “Receipt” screen. In the “Original Quote” screen you should see someone’s name in BIG LETTERS as well as a Yellow “Need” and next to it should now be a blue button that says “Receipts” this blue button is how you get back to the “Receipt” screen.



When you click that button, you should see two things a red line and a white line always click the white line never the red one. The red one will create a blank new receipt which is NOT what we want



Step 10: After you have now landed back on the "Receipt" screen you can now print the paper where the customer who requested the special MUST sign. If you look to the top right of the screen you should see 3 buttons "Email", "Save," and "Print," click "Print" where a drop down will pop up and you want to click "All" then depending on your location selected the printer you want the papers to print too.



Though you have now finished checking if a special order is ready for delivery/pick up we will now move on to how to charge out a Special Order.

Charging out Special Orders

Charging a special order isn't hard BUT it takes time getting used to since the process if very technical/ tedious to do the first couple of times because there are so many steps.

After you have printed your papers before we can charge out the order, we must CONTACT the customer either via **Email, Phone, or through Teams messaging.**

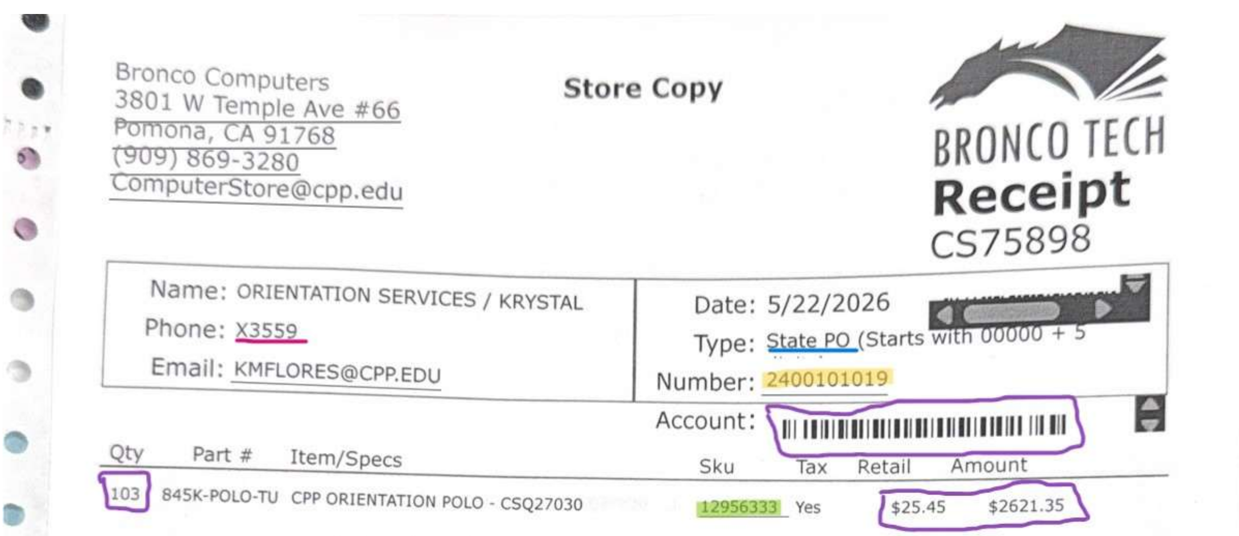
If you are an underneath Keith's payroll you are required to do this step no questions asked. As for if you are a part of Lori's people or Michelle's you ARE NOT required to take this step.

For the best fastest way to contact the customer would be through a Teams messaging below is the format/template that is recommended to use when sending a team's message to a customer for a special order:

Hello @ [The customers name]!

My Name is [Your Name] and I am with the Bronco Bookstore. I just wanted to let you know that [what they ordered] is ready for pick up or delivery. Please let me know which is best for you, if you would like a delivery, please reply with the location and timeframe for said delivery. Please and thank you!

If you don't feel comfortable sending a team message you can always ask a team lead or supervisor to do so. You can also send an email using the same format as above and if you don't like NEITHER you can use the customer EXT. number that is displayed on the printed papers.


Bronco Computers
3801 W Temple Ave #66
Pomona, CA 91768
(909) 869-3280
ComputerStore@cpp.edu

Store Copy

BRONCO TECH
Receipt
CS75898

Name: ORIENTATION SERVICES / KRYSTAL
Phone: X3559
Email: KMFLORES@CPP.EDU

Date: 5/22/2026
Type: State PO (Starts with 00000 + 5
Number: 2400101019
Account:

Qty	Part #	Item/Specs	Sku	Tax	Retail	Amount
103	845K-POLO-TU	CPP ORIENTATION POLO - CSQ27030	12956333	Yes	$25.45	$2621.35

Once you get word back from the customer you can then charge out the items, please keep in mind that it can take a week or even a couple of days to get back to you so please either tell someone what you did, when you did, for that special order and never be afraid to send updates or follow ups for those deliveries. The bookstore doesn’t have a lot of space, so we need to clear our warehouse in a timely manner.

Now charging out orders is very selective as stated before. If you are a part of Kieth’s payroll, this step is required for you to learn but as for everyone else, no.

Step 1: Using the paper you have printed out **AND THE CUSTOMER HAS ALSO REPLIED BACK FOR A PLANNED DELIVERY**, please head over to the register, any register is fine but preferably the one at Tech because you do need to do a last step that involves a computer

Step 2: Once you are in front of the register **always make sure you are signed in as your name**, if you use someone else’s account, it will create issues because if something was to go wrong with the order, accounting will reach out to whoever charged it out.

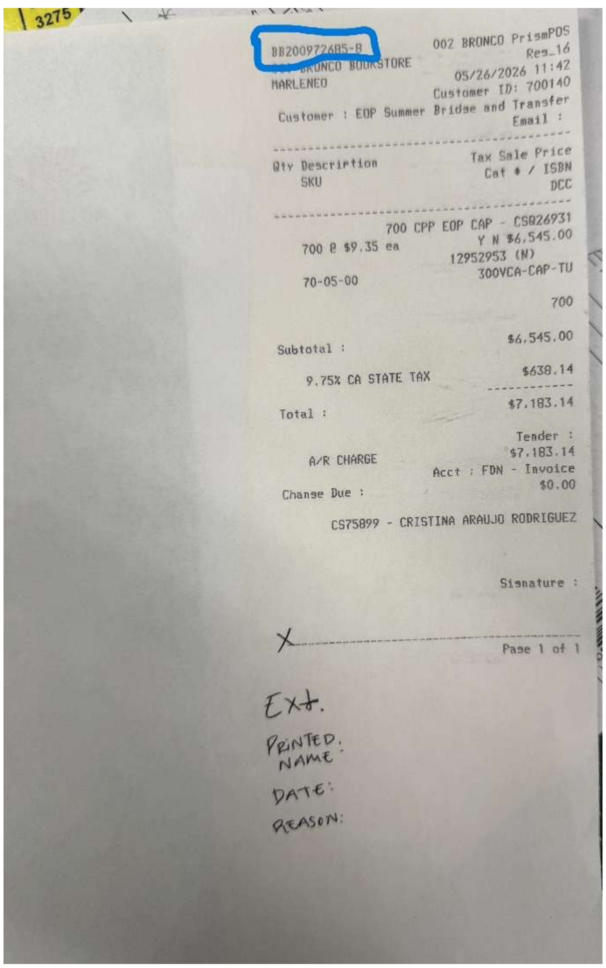
On the register you should see 5 icons starting from “Quick Menu” “Items” “Customer” “Receipt” “Tender”

- Click on the “Customer” icon and above there's a search bar. Click it with your finger and use the scanner, scan the barcode that is displayed on the printed papers you have; Please use the “Store Copy” paper.
    - If done correctly you should now see a yellow box near the totals to the left with the words saying “CSQXXX” or if it's for a place the name of the place.
- After that click on the “Items” tab and start manually typing out the SKUs, now this part is where you **must** pay close attention because at times the order one is charging out many have a lot of items so you must figure out a system where you don’t confuse yourself.
- After you had entered all the SKUs you below that yellow box is a green box that says “Pay: $XXX.XX” where the total displayed using the same “Store Copy” paper on the bottom right is the total amount, THEY MUST MATCH. Once you have verified that they match click on the “Pay” button which should lead you to a paper where there are 10 different payment methods for ALL IF NOT MOST SPEICAL ORDERS ARE ALWAYS GONNE BE “A/R CHARGE”

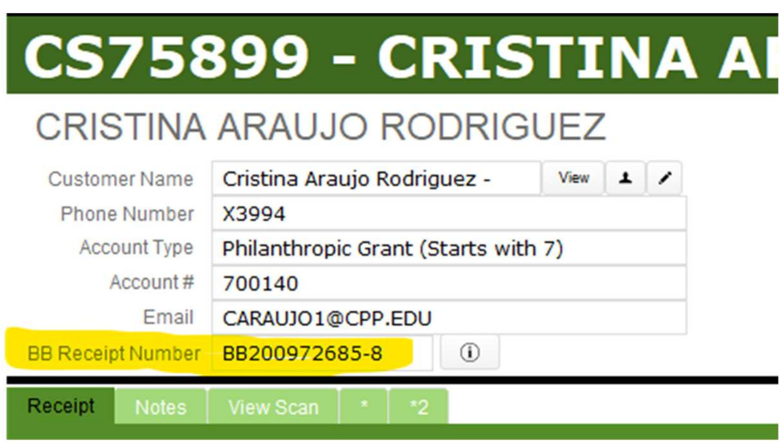
  - Once you have clicked on the A/R charge button you should automatically say "Insert paper," where you will Insert the A/R paper into the machine that prints out the receipt.
- After you have entered the paper either click "OK" or press "Enter" on the keyboard of the register. Once that happens the machine will start printing out the receipt for the customer to sign.
  - After all that is done you should now have 4 different types of paper.
    1. Store Copy Paper
    2. Customer Copy Paper
    3. A/R Papers (Printed with the information of the transaction)
    4. A long green Bronco Bookstore receipt

Before you head out to your delivery whoever is doing the charging out MUST take this last step, which is adding the BB number from the receipt or A/R paper. As well as for now writing what is needed from the customer for signature purposes.

Below inside the blue box is where you would find the BB number on an A/R paper:



After you have found the BB number go back to the receipt screen of the quote you are charging out and locate the section that says, "BB Receipt Number" and enter the number; Below is an image of that



Once you have all this you are now ready to finish your delivery.

Guidelines

This section is to be referenced as what is needed by the customer for signature purposes for the special orders.

1. Below are the things needed on the papers you will provide the customer with to sign
    a. They MUST sign the "Store Copy" paper
        i. Signature, printed name, and date
    b. They MUST sign the A/R Paper with these 5 things
        i. Signature
        ii. Printed Name
        iii. Date
        iv. Their EXT. Number
        v. Reason for purchase
2. What you keep is the "Store Copy" paper WITH the signature AND the yellow A/R paper that has the signatures
    a. EVERYTHING ELSE is for the customer

If they are confused as to WHY they need a reason for purchasing because both sides of accounting us and theirs need to validate that this purchase has caused, if they continue not to give you say that they must for accounting purposes. THIS IS NON-NEGOTIBALE.