



Special Order System

Process and Procedures

Special Order Process for Bikes & Frames

1. Store collects full payment before submitting order, selling either existing part # or #6.
2. Store places Special Order through MBOS, located on info. Creates bike sales tag and references order #.
3. Purchasing places order with vendor, ships to DC.
4. Purchasing creates part# (if necessary) using "S/O xxxxxx" as Desc 1, swapping # 6 on a new receipt if necessary.
4. Purchasing creates PO to ship to DC, with PO# of ordering store # + "S/O" + customer last name+date, for example: "02 Liggett3/1/13" (02 and Liggett used as example only.) Updates MBOS status to "Ordered".
6. DC receives bike, vouchers in to DC, assembles bike, and transfers to store on Out Slip. Updates MBOS to "Received, Given to Sales".
7. Lead Ops checks in bike at store, creates In Slip, notifies MOD.
8. MOD or Lead sales calls customer and informs them that their order is ready for pick up.

Special Order Process for P&A (Sales)

1. Store places Special Order through MBOS. Must submit credit card info on order form.
2. Purchasing places order with vendor to ship direct to store, updates MBOS with order details.
3. Purchasing creates part# (if necessary) using "S/O xxxxxx" as Desc 1.
4. Purchasing creates PO for receiving store, with PO# of store # + customer last name + date, for example: "02 Liggett3/1/13" (02 and Liggett used as example only.) Updates MBOS status to "Ordered".
5. Product arrives at store and Lead Ops vouchers it in using existing PO.
6. Lead Ops prints a bar code and attaches it to product.
7. Lead Ops attaches pack slip envelope to product, inserts slip with customer name and S/O#. Updates MBOS to "Received, Given to Sales".
8. Lead Ops hands product to MOD or Lead Sales.
9. MOD or Lead Sales captures cc info from S/O site and rings up sale using correct Rpro part# and correct customer file.
10. MOD or Lead Sales calls customer and informs them that their order is ready for pick up. MOD Updates MBOS to "Completed and Sold"
11. MOD or Lead Sales attaches RPro receipt and RPro cc signature slip to product and places in S/O pickup area. **Product may not be placed in this area until paid in full and recorded in RPro**
12. Upon pickup of product, customer must present cc used for purchase and matching ID, and must sign RPro cc signature slip, which goes in the drawer.

Special Order Process for P&A (Tech)

1. Store places Special Order through MBOS, selects "Repair Bike" as ship method, and enters Work Order #.
2. Purchasing places order with vendor to ship direct to store, updates MBOS with order details.
3. Purchasing creates part# (if necessary) using "S/O xxxxxx" as Desc 1.
4. Purchasing creates PO for receiving store, with PO# of store # + "repair" + customer last name+date, for example: "02 repair Liggett" (02 and Liggett3/1/13 used as example only.) Updates MBOS status to "Ordered".
5. Product arrives at store and Lead Ops vouchers it in using existing PO.
6. Lead Ops prints a bar code and attaches it to product.
7. Lead Ops attaches pack slip envelope to product, inserts slip with customer name and S/O#. Updates MBOS to "Completed, Given to Tech".
8. Lead Ops hands product to Tech Manager or Lead Tech.
9. Tech installs part, records S/O part # and price on paper work order, creates Sales Order in Rpro using the correct S/O part#.
9. Upon bike pickup, RPro receipt is processed and customer pays as usual.

Rules

1. Only Lead Ops may open and receive orders.
2. Only Lead Ops may remove product from Ops area, and only after it has been vouchered in as described above.
3. Split PO's: Requires Special PO Format "Store Code/Vendor Code/"Split"-Date. **Ex. "02QBPSPLIT-02/21/13"**. Lead ops will reference MBOS and line items on invoice to match up orders and receive. Lead ops will be responsible for handing received parts to MOD for sales or TM or lead tech for service items.

Systems to catch mistakes

1. **Unfulfilled PO's with a customer name in the PO# mean order hasn't been vouchered in.** Requires weekly monitoring by GM.
2. **S/O part # with qty > 0 in Rpro inventory mean an order has been vouchered in but not sold.** Conduct physical inventory of all S/O part numbers 1 time per week.