



## STORE SYSTEMS & OPERATIONS

# IN-AISLE CUSTOMER SPECIAL ORDER PROCESS

STEP	1 ORDER ENTRY	2 COMPLETE POS TRX	3 RECEIVE	4 INVOICE	5 STAGE	6 ASSEMBLE (WHEN APPLICABLE)	7 IN-STORE PICK-UP OR DELIVER	8 MISCELLANEOUS	
SYSTEM TOUCH-POINT			Mobile App 		Mobile App 	Mobile App 	Mobile App 	Mobile App 	 or 
LEAD	Sales Associate	Cashier	Designated Staff	Back Office Store Associate	Designated Staff	Designated Staff	Cashier or Sales Associate	Designated Associate	Back Office Associate
LOCATION	In-Aisle / Hub	POS or Hub	Back Room	POS	Staging Area	Staging Area	In-Aisle or Hub	Delivery Destination	Back Office
ACTIONS	<ul style="list-style-type: none"><li>• Create Stock Reserve or Customer Priority Order</li><li>• Ask about assembly and/or home delivery</li><li>• Sell in item's order multiple</li><li>• Communicate Estimated Time of Arrival</li></ul>	<ul style="list-style-type: none"><li>• Search in Eagle by customer phone #</li><li>• Take 100% Deposit</li><li>• Ring up items being taken today separately</li><li>• Provide special order receipt to customer and thank them</li></ul>	<ul style="list-style-type: none"><li>• Pull special orders via Sort and Seg feature</li><li>• Scan totes with Special Orders</li><li>• Print Pick Sheets</li></ul>	<ul style="list-style-type: none"><li>• Reference order </li><li>• Ensure no remaining balance due</li><li>• Staple invoice to Pick Sheet</li></ul>	<ul style="list-style-type: none"><li>• Review Pick Sheets and sort them by 1) in-store pickup, no assembly, and 3) delivery, no assembly</li><li>• Cross-reference pick sheet </li><li>• Receive orders via fulfill customer o </li></ul>	<ul style="list-style-type: none"><li>• Physically assemble product</li><li>• Advance order via Order Prep feature</li></ul>	<ul style="list-style-type: none"><li>• Complete pick up via the Ready for Pickup feature</li><li>• Locate order in staging area</li><li>• Validate Pick Sheet, invoice and order was paid in full</li><li>• Thank customer</li></ul>	<ul style="list-style-type: none"><li>• Pack up product/paperwork</li><li>• Create route in Needs Delivery feature</li><li>• Validate Pick Sheet, invoice, and order was paid in full</li><li>• Take photo for unattended deliveries</li><li>• Complete delivery in mobile app</li><li>• Thank customer</li></ul>	<ul style="list-style-type: none"><li>• Location code non-stocked special orders as 'DNRSP'</li><li>• Flag large quantities as unusual usage in ITR</li><li>• Review open orders</li></ul>
OUTCOMES	<ul style="list-style-type: none"><li>• Order confirmation sent to customer</li><li>• Order auto-sent to Eagle as a Special Order</li><li>• Order appears in ACNET's Order Tracking </li></ul>	<ul style="list-style-type: none"><li>• Creates SKU in Eagle, if it hadn't existed</li><li>• Committed Qty. updated</li><li>• Deposit amount recorded in Eagle</li></ul>	<ul style="list-style-type: none"><li>• Prepares product for invoicing and staging </li></ul>	<ul style="list-style-type: none"><li>• Qty. On Hand decreased</li><li>• Committed Qty. relieved</li><li>• Sales transaction recorded</li></ul>	<ul style="list-style-type: none"><li>• If in-store pick up, notification sent </li><li>• If assembly or delivery required, order moved to Order Prep feature in mobile app </li></ul>	<ul style="list-style-type: none"><li>• If order is an in-store pick up, notification sent to customer</li><li>• If delivery required, this moves order to Ready for Delivery status in mobile app</li><li>• Delivery notification sent to customer on delivery date</li></ul>	<ul style="list-style-type: none"><li>• Closed order </li></ul>	<ul style="list-style-type: none"><li>• Closed order </li></ul>	<ul style="list-style-type: none"><li>• Review the sales performance of special order items</li><li>• Keeps items from being reordered</li><li>• Addresses order point issues</li><li>• Remedies overdue outstanding orders</li></ul>

# In-Aisle Customer Special Orders - FAQs



## 1. Why should I care about this new Customer Special Order Process?

Consumers are increasingly shopping retail a number of different ways (i.e. in-store pick up, BOPIS, BODFS), and expect stores to adapt and have the products they desire. Special orders can be a key market differentiator and ultimately add incremental profitability to your bottom line. In fact, the average ticket at Ace for a special order is roughly \$115, more than three times the amount of an average transaction. With the recently launched upgrades, the special order process is now much more modernized. ACENET and the Retailer Mobile App have been integrated with your Eagle system, enabling near real time data synchronization, reducing the time and the number of steps to process special orders.

## 2. We use the mobile for special orders, but there are times in the process it is more convenient to use a computer terminal versus mobile. Has there been any changes here?

One of bigger developments rolled out is ACENET's ability to enter customer special order. Specifically, leveraging ACENET, customer orders can either be processed as a stock reserve or customer priority order (when available). Doing so brings the information into your Eagle system, and adds the item to your inventory file if it is not already there. Cancelling a special order can also be executed in ACENET and automatically flows back to your Eagle for Windows.

## 3. Super important to the special orders is communicating back to the customer the status of their order. How is this accomplished with this experience?

During the order entry process, the Sales Associate obtains a phone number from the customer as to where to receive notifications. In turn, customers receive notifications when their order is acknowledged, when the order is ready for pick up, or the date of home delivery.

## 4. I hear different things. When is the right time to invoice the special order?

Under the enhanced special order process, execute them immediately after receipt from the RSC. Upon completion, sales are recorded in Eagle for Windows, committed quantities decreased, and the status of the order updated in your Retailer Mobile App.

## 5. From time to time, customers call in asking for updates to their special orders, which we don't have a really good process for checking on efficiently. Has anything changed here?

Yes. Moving forward, in these instances, leverage ACENET or the Retailer Mobile App Customer Order Tracking lookup. Doing so enables you to search the status of an order by last name, or order number. Beyond orders taken by the Retailer Mobile App within ACENET, AceHardware.com orders are also captured in these programs.

## 6. I see the value in the process, but I would like more understanding to implement. What do I do?

Ace Way of Retailing remains as your one-stop place for a step-by-step understanding and theory behind establishing the best practices. Path: ACENET > About Ace—Ace Way of Retailing > AWOR Search: Special Orders.

## 7. I reviewed the best practice on AWOR. Why do I need to take a 100% deposit?

Studies show that 15% of customer special orders are never picked up by the customer, resulting in a potential and sizable profit loss. Taking a full deposit eliminates the financial risk on the part of the store, and facilitates a sense of urgency for the customer to pick up the product.

## 8. What are some important but underutilized best practices I should be doing with every special order I process?

Though the Ace Way of Retailing Customer Special Orders (In-Aisle) document outlines each best practice, some of the top ones include:

- Inform customer of your policy to have orders picked up within five days of notification.
- Enter the item in the order multiple in which it comes in, particularly if you don't stock the product.
- For a clean process, do not include any items to be taken by the customer that day under the same transaction as the special order. Ring those up separately.

## 9. I haven't been using the retailer mobile app for anything more than product searches. Can I still take advantage of the benefits of this process?

To maximize efficiencies, the customer special order process is best executed using the Ace Retailer Mobile App. Training via the Ace LearningPlace and Ace Way of Retailing best practices are available to assist you in your journey in getting started successfully. Start saving time today!

## 10. Are my in-aisle customer special orders supposed to appear in the Acehardware.com Order System (AOS)?

AOS currently only tracks e-commerce related orders. In-aisle customer special orders can be reviewed via ACENET's order tracking system and the retailer mobile app order lookup feature. See AWOR for further detail.

## 11. Who do I contact with any further questions and support?

For further details about the customer special orders, contact the Store Systems and Operations team.