

# Point-of-Sale Basic Training - Cash Sale Entry

## Entry of a Cash Sale Order (Cash & Carry)

With the Tag-n-Trak main menu displaying, select **Point of Sale**.

```

Release      +-----+
4.05.xxx    |           |           System Date
mm/dd/yy    | Lighting Store 1 |           12345
            |           |           1
            | 1 Point of Sale |
            | 2 Master MENU TWO|
            | 3 Accounts Receivable|
            | 4 Inventory       |
            | 5 Inventory Purchasing|
            | 6 Closing Routines |
            | 7 System Administrator|
            | 8 Exit To Operating System|
            +-----+
    
```

From the Point of Sale Menu, select **Main Order Entry**.

```

Release      +-----+           System Date
4.05.xxx    |           |           12345
mm/dd/yy    | Lighting Store 1 |
            |           |
            | POINT OF SALE MENU |
            | 1 Main Order Entry |
            | 2 Payments / Adjustments|
            | 3 Cash Drawer Totals |
            | 4 Batch Invoice Report |
            | 5 Line Item Archive   |
            | 6 Order Gross Profit Review |
            | 7 Quotation Load     |
            |           |
            +-----+
    
```

```

PPPPPPPPPPP      OOOOOOOOOOOO      SSSSSSSSSSSS
P                P                O                O                S
P                P                O                O                S
P                P                O                O                S
P                P                O                O                S
P                P                O                O                S
P                P                O                O                S
PPPPPPPPPPPP      O                O                S
P                O                O                O                S
P                O                O                O                S
P                O                O                O                S
P                O                O                O                S
P                O                O                O                S
P                OOOOOOOOOOOO      SSSSSSSSSSSS

          POST DATE mm/dd/yyyy Defaults to Current System Date
          DIVISION      01 Enter Div# only if Used
          SALESPERSON    _  Each Salesperson has ID/password
    
```

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### Order Header Screen for Cash Sale Entry

The cursor rests in the Cust (customer ID) field. When entering a new order, the order# field is left blank. An order number will be assigned after completing the order header screen. (To change an existing order, press up arrow to move to the order # field.)

Enter **CASH** as the customer ID (unless your company uses a different ID for entry of cash sale tickets).

Optional: The sales person can request a customer phone number and address to add this cash customer to the “mailing list” file. If the customer already exists in the mailing list file, entry of their phone number will automatically display the name and address. If you are using this feature, **enter the phone number (including area code) in the Name field.** Next enter the address including state and zipcode.

If you are not using the “mail list” feature or if the customer does not wish to give you their phone number, simply press [F10] to bypass.

MM/DD/YYYY	POINT OF SALE	CUST ID
Order: _____ Cust: CASH	Column: _ +/- _____ %	Spec: _ Prompt: _
Name: _____	Tax: _ _____ %	Age: _
Address: _____	Terms: _____	Slp: _____
City/St: _____	Status: _____	PSlp: _____
Zip: _____ (____) _____		Lines: _____
Contact: _____	Stage Loc: _____	Deliver: _____
Credit: _____ Allow: _____	P.O.#: _____	Ship: _____ Type: _
Bill To		
Name: _____		
Address: _____		
City/St: _____		
Zipcode: _____		
F2=TO NAME F3=INQ F4=PRT TTL F7=NXT ODR CUST F8=PRV ODR CUST TAB=SUM TTL		

After pressing [F10], the cursor will optionally stop at the “Deliver” date field to enter an expected deliver date. For cash and carry type sales, press [Enter] to bypass the Deliver date field. The cursor also will optionally stop at the “Ship” field to enter a ship method. Typically, on point-of-sale counters, the “Ship” will pre-fill with “Pick Up.”

After optionally entering a deliver date and ship method, the cursor will rest in the order “Type” field. Typically, the Type field will pre-fill with L (meaning “lighting” or “layaway”) order.

Stage Loc: _____	Deliver: _____	
P.O.#: N _____	Ship: PICK UP	Type: L

Type [Enter] at Type: L to open an order. (Use Type: Q to open a Quote.)

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If the taxability (Y=taxable vs N=nontaxable), or the sales tax code needs to be changed, press "up arrow" to move to: **Tax:** \_ \_\_\_\_ % Press F3 to look up valid tax codes and select the appropriate one.

Press [Enter] at Type: L field to open an order. (Enter a Q in the Type field to open a Quote.)

### Begin Selling Items

Once an order has been opened, you may begin entering items to sell. The quantity field will default to 1. Press [Enter] to accept a quantity of 1 or change the quantity as needed.

To return an item for credit, enter a NEGATIVE QUANTITY.

**Item:** Enter the item number exactly as it appears in the inventory file. If you know only a portion of the item number, enter what is known, enter the vendor code and then press [F3] for the Look Up screen.

If you have entered an item number that is in your inventory file, the item will display showing the item description, the customer's price and the quantity available to sell (displayed next to QAV).

If the price is correct, simply press **[F10] to sell the item**. If the price is incorrect, press the [Enter] key to move the cursor to the Price field. Press [Delete] key to "blank" the price field. Type in the correct price.

MM/DD/YYYY	POINT OF SALE		MAN
Order: 2957	Cust: CASH	Name: CASH SALE	
Column: B +/-	0.000% Special: B	Ship: PICK UP	Slp: GA Lines: 0
Tax: Y MO	7.2500% CR: 0	Status: O	MM/DD/YYYY Type: L
Ln#	Item Number	VC	Ordrd Dlvrd Bkord TFL Sell Price Total
AC	QAV: 3		
Qty: 1	Item: 40065	VC: CAR	Tax: Y Prc: 135.000
Stk: S STK	Room: _____	Loc: R1- S2	Flg: Cost: _____
Info: _____		Net: _____	Disc: 0.000
Desc: 902 17X41 GOLD BEAD & FLORAL		LBR: _____	0.00
F2=TO QTY F3=INQUIRY F4=ALT/SUPER F7=UPC TOGGLE F8=AUTO TOGGLE TAB=TOTAL			

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Continue entering new items for sale until complete.

MM/DD/YYYY	POINT OF SALE				MAN		
Order: 2957	Cust: CASH	Name:	CASH SALE				
Column: B +/-	0.000%	Special: B	Ship: PICK UP	Slp: GA	Lines: 4		
Tax: Y MO	7.2500%	CR: 0	Status: O	MM/DD/YYYY	Type: L		
Ln#	Item Number	VC	Ordrd	Dlvrd	Bkord TFL	Sell Price	Total
1	40065	CAR	1		Y	135.000	135.00
2	45163	CAR	1		Y	214.200	214.20
3	BA2-GL	WAC	1		Y	63.000	63.00
<p>___ Qty: 1      Item: _____ VC: ___ Tax: Y Prc: _____</p> <p>Stk: _____ Room: _____ Loc: _____ Flg: ___ Cost: _____</p> <p>Info: _____ Net: ___ Disc: _____</p> <p>Desc: _____ LBR: _____</p> <p>F2=TO QTY   F3=INQUIRY   F4=ALT/SUPER   F7=UPC TOGGLE   F8=AUTO TOGGLE   TAB=TOTAL</p>							

The number of Lines shown in the upper right reflects regular line items as well as special line types (such as room location lines). Some of these special line types are not displayed until needed.

When selling an item that is not in stock or is a special order item, the following message appears at the bottom of the screen:

INSUFFICIENT QOH - Alternate Sell Lost speCial Bko Partialbko Nosale Qrv

Enter the letter that is capitalized for the function you want. Typically B to Backorder, C to speCial order, P to Partially backorder. "S" will force Sell the item. Backordering and Special ordering will be covered in a different section of the Point-of-Sale Basic Training.

### Delete a Line Item

To delete a line item, press the "up arrow" key to move the cursor to LN# field. Enter the LN# of the item to be deleted. It will be displayed in the bottom portion of the screen.

**Press [F6] to delete.**

If the item has a room location and it is the only item grouped under that room location, the room location line will be deleted automatically. If the item has a related item associated with it, the related item (typically a bulb) will be deleted automatically.

You will not be allowed to delete an item if it has been shipped (using partial shipments) or if it has a related item that has been shipped.

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### Change a Line Item

To change a line item, press the “up arrow” key to move the cursor to LN# field. Enter the LN# of the item you wish to change. Press [Enter] to move to the field that needs changing (such as the price). Press [F10] to save your change.

### [F2]=To Qty

The bottom of the screen displays a brief description of the function keys. Refer to [F2]=TO QTY. When entering line item information, pressing [F2] once will move the cursor to the quantity field and allow you to change it. Pressing [F2] TWICE will “clear” the bottom of the screen and allow you to re-enter.

### Total and Close an Order

When finished entering line items, **press [TAB] to go to the totals page.**

The total of the order and Balance Due will be displayed in the box.

- **Current Payment:** Press the **TAB** key to bring the Balance Due into the Current Payment field. Use TAB if the customer is making full payment. If the customer is making a partial payment, type the amount the customer is paying.

```

MM/DD/YYYY                POINT OF SALE
Order: 2957                Cust: CASH                City/State:
Name:  CASH SALE          Zip:                Phone: (   )
Address:                  Contact:
Address:                  Terms Code: D  CASH
Price Level: B Adjustment: 0.000%  Tax - Flag: Y Cd: MO  Percent: 7.2500%
Spec Price: B            Status: O 03/20/2001  Ln: 4
P.O.#: N                Avail CR: 0  Ship: PICK UP  Age: 1 Slm:GA  Type: L
-----ORDER CLOSING-----
Price Subtotal:          412.20                Special:          0.00
Discount:                0.00                Discountable Amt: 412.20
Tax: 7.2500              29.88                Labor:           0.00
Deposits:                442.08  Freight:          0.00  Other Charges:    0.00
Allowance:               0.00  Taxable:          412.20  Nontaxable:       0.00
Total:                   | 442.08 |  Sales:           412.20  Returns:          0.00
Balance Due:              | 0.00 |  Cost:                Gross Profit %:
+-----+                1 CASH                2 CHECK            3 VISA/MC
Current Payment:         442.08                4 AMEX/DISCV       5 GIFT CARD        6 REFUND CHK
REC Method: 2 Amt:       442.08  REC Method:         Amt:
Accts. Receivable:
Change ***** 0.00 *****
F2=ENTER DISC  F7=RETURN ENTER MORE  F8=ACCUMULATE DISC  TAB=TOTAL
CONTINUE TO CLOSE ORDER Y OR N
    
```

- **Rec Method:** “Rec Method” means the Receipt or Payment Method. The Payment Methods are displayed on the screen. Your payment methods will likely look different from the sample shown above. Pay method 1 is Cash, pay method 2 is

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Check. Pay methods 3 through 6 are payment methods defined in main options by your system administrator specifically for your company.

- If the customer is paying cash, simply press Enter because the Rec Method defaults to 1. Otherwise, enter the appropriate REC Method. (NOTE: Pay Method Zero 0 is used to close an order to Accounts Receivable.)
- If paying by cash or check, you **MUST ENTER** the amount received in the **Amt** field and then press the **Enter** key. If the amount received is more than the balance due, the program displays the change to return in the **“Change”** field.

Note: If the Current Payment is a negative amount (as it will be for a merchandise return order), the “Amt” field will pre-fill with the negative amount for all payment methods.

- See the sample shown below. The Balance Due is \$69.33. The customer is paying in full so this is also the amount in the “Current Payment” field. The REC Method is 1 for CASH. The customer gave the salesperson \$70.00 in cash. The amount of change to return to the customer is 67 cents.

Total:	69.33
Balance Due:	69.33
Current Payment:	69.33
REC Method: 1 Amt:	70.00
Accts. Receivable:	
Change *****	0.67 *****

- When using pay methods 3 through 6, the Amt field pre-fills, so simply press the **Enter** key.
- Press the **[TAB] key to accept the payment**. If full payment is made, the Balance Due will change to 0.00 and the program will prompt the salesperson to close the order:

**CONTINUE TO CLOSE ORDER Y OR N**

Respond “N” for No if the customer is not taking the merchandise with them. This is the normal response if the item will be delivered later. Responding “N” leaves the order in a Hold status to be closed later when the item is delivered or picked up.

Enter “Y” for Yes if you wish to close the order. “Y” for Yes is the appropriate response if the customer is taking the merchandise with them immediately.

- If partial payment was made, the order goes to a **HOLD** status. The “Balance Due” will reflect the amount the customer still owes.

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### Print an Invoice for the Cash Sale

Press **[F4]** to print the order. The print menu displays on screen. Enter the printer number only if it is different from the default printer displayed, otherwise, simply press the **Enter** key.

Select the document (type of form) you want to print. If the order is closed, the system will default to an Invoice. If the order is still open (or hold), the system will default to a Pick Ticket, however, you may select any type of form from the pop-up print menu.

Refer to the sample pop-up print menu shown below. Forms are “custom defined” for your company by Mylee Systems in conjunction with your system administrator. Your print menu will likely look different from what is shown. The forms available for each printer may vary.

```
Select Printer: 1 ( 1=Default R=Receipt)
Select Document: 1
Print on Quote: (Item, Upc, Neither)
1-Invoice      2-Pick Ticket      3-Partial Shipment
5-Credit Memo  9-Overage Receipt  A-Acknowledgement
G-GP Review    N-Quote=NO Item#s  P-Quote No Totals
Q-Quote= w/Item#s
```

### To Delete an Entire Order

On the order header screen, enter the order number to be deleted. **Press [F6]**. You will be asked if you want to delete this order. Typically, only managers have permission to delete orders that have been printed.

The system does not allow the deletion of closed orders. Also, deleting an order with a payment “taken on it” will delete all of the line items, but NOT the payment. (There is a separate procedure for deleting or reversing payments taken on an order.)