

# Point-of-Sale Basic Training Special Orders & House Jobs

## How to Enter a New Customer Order

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

```

Release      +-----+
4.05.xxx    |                    | System Date
mm/dd/yy    |                    | 12345
            |                    |
            | Lighting Store 1 |
            |                    |
            | 1 Point of Sale  | TID      1
            | 2 Master MENU TWO| UID      name
            | 3 Accounts Receivable| PPID     9999
            | 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      +-----+
4.05.xxx    |                    | System Date
mm/dd/yy    |                    | 12345
            |                    |
            | Lighting Store 1 |
            |                    |
            | POINT OF SALE MENU |
            |                    |
            | 1 Main Order Entry | TID      1
            | 2 Payments / Adjustments| UID      name
            | 3 Cash Drawer Totals  | PPID     9999
            | 4 Batch Invoice Report |
            | 5 Line Item Archive   | tem
            | 6 Order Gross Profit Review |
            | 7 Quotation Load     |
            +-----+

```

```

PPPPPPPPPPP      OOOOOOOOOOOO      SSSSSSSSSSS
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          SSSSSSSSSSS
PPPPPPPPPPPP      O          O          S
P          O          O          S
P          O          O          S
P          O          O          S
P          O          O          S
P          O          O          SSSSSSSSSSS

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

```

## Point-of-Sale Basic Training Special Orders & House Jobs

### Order Header Screen

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.)

A new order can be opened by entering the customer's ID or name. To search for the correct ID, type a partial ID in the Cust field or a partial name in the Name field and press **[F3]** for Customer Master Lookup.

mm/dd/yyyy	POINT OF SALE	CUST ID
Order: _____	Cust: _____	Column: _ +/- _____ % Spec: _ Prompt: _
Name: _____		Tax: _ _____ % Age: _
Address: _____		Terms: _ _____ Slp: _
		PSlp: _
City/St: _____		Status: _ _____ Lines: _
Zip: _____ (____) _____		
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		

The first match is highlighted on the Customer Master Lookup screen. Use [Pg Up] or [Pg Dwn] to scroll by screen. Use the Up or Down arrows to move to the desired customer. Press [Enter] to choose a customer. While on the lookup screen, [F7] toggles between displaying in Customer ID sequence or Name sequence.

NOTE	CUSTOMER MASTER LOOKUP	NAME [F7]
ID	NAME	CITY ST
8681732	ALBERT ALLSMAN	ST LOUIS MO
7259200	ALTMAN, JASON	ST. LOUIS MO
AMERINT	AMERICAN INTERIORS	
9612541	ANDERSON, JENNY	ST. LOUIS MO
2277955	ARCHER CONSTR CO	ST. LOUIS MO
8615544	BALDWIN, JAMES	ST. LOUIS MO
CASH	CASH SALE CUSTOMER	

A new cash or charge customer account can be created from the Point of Sale header screen by entering a Cust ID that does not exist in the customer master file. A message will display at the bottom of your screen: RECORD NOT FOUND.

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Find out from your system administrator whether you should create a new account for Cash Sale customers or use a “catch all” cash sale customer account number (such as CASH).

Order: \_\_\_\_\_ Cust: 5521045  
 Name: JOHN SULLIVAN  
 Address: 1011 MARKET ST

City/St: ST. LOUIS MO  
 Zip: 63021 (314) 632-5541  
 Contact:  
 Credit: 10000 Allow: 0.00

Bill To

Name: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City/St: \_\_\_\_\_  
 Zipcode: \_\_\_\_\_

F2=TO NAME F3=INQ F4=PRT TTL F7  
 OK TO ADD CUSTOMER? (Y OR N)

When creating a new customer account, you'll be prompted to enter a ship to name and address.

The credit limit is left blank/zero for a cash customer. A credit limit must be entered for a charge customer. Establishing credit limits is usually only permitted by managers or accounting personnel.

Entry of the Bill To address is optional.

Respond Y to create a new customer master account.

After finding the correct customer account or creating a new one, press [F10] to move to the order “Type” field which prefills with an L (lighting or layaway) order.

Depending on how your terminal options are set up, your cursor may stop at the “Deliver” date field (to enter an expected deliver date) and the “Ship” field to enter a ship method. Typically, on point-of-sale counters, the “Ship” will prefill with “Pick Up.”

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.)

If your customer requires a P.O.#, the cursor will stop in the PO# field.

If the order you are entering is a “house order,” the “up arrow” key can be used to move to the “Allow” field and enter a **builder allowance amount**.

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] for Tax Lookup Screen.

Press [Enter] at Type: L field to open an order. Type Q is for Quote.

## Point-of-Sale Basic Training Special Orders & House Jobs

### 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. Enter a negative quantity for a returned item.

**Item:** Enter the item number exactly as 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). The cursor will rest in the Room Location field.

### How to Enter a Room Location when Selling Line Items in Point of Sale

Room locations may be entered on any sales order -- cash sales, special orders and house jobs. It is particularly helpful to enter the Room location for each item on House Orders/Jobs. The room location can be printed on pick tickets, quotes, and invoice forms as well as the orange job box labels.

Enter the room location either by name or code. For example, the code (abbreviation) for the room location "\*\*\*FOYER" is "FOYR" in the example below. Typing in the code FOYR will display \*\*FOYER in the room location field. Room location codes (abbreviations) may be from one to four characters.

Press [F3] in the Room field to view a list of default room locations. **The list of "default" room locations can be edited to meet your company's needs.** Room locations may be added to and deleted from the list.

```

mm/dd/yyyy                POINT OF SALE                MAN
Order: 2959                Cust: 5521045                Name: JOHN SULLIVAN
Column: A +/-              0.000% Special: B Ship: PICK UP                Slp: GA Lines: 0
Tax: Y MO                   7.2                +-----+                Type: L
Ln# Item Number            Room Location Lookup                Sell Price                Total
Room Description
BSRM **BONUS ROOM
BTH2 **BATHROOM 2
BTH3 **BATHROOM 3
BTH4 **BATHROOM 4
DECK **DECK
DNRM **DINING ROOM
EAVE **EAVES-FLOODS
ENTY **ENTRY
FMLY **FAMILY ROOM
FOYR **FOYER
FPOR **FRONT PORCH
AC QAV: 0
Qty: 1                    Item
Stk: S/O                  Room:
Info:
Desc: 884 17X50 WHITE
F2=TO QTY F3=INQUIRY    F4=ALT/SUPER F7=UPC TOGGLE F8=AUTO TOGGLE TAB=TOTAL
ax: Y Prc: 118.500
lg: _ Cost:
et: Disc: 0.000
LBR : 0.00
    
```

Highlight the desired room location and press [Enter].

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If the room you need is not on the list, simply type it in the Room field.

When you continue entering additional items on your sales order, items will be grouped by the room location.

**Note: Pressing a period in the room location field repeats the room location from the previously entered item.**

Note: Pressing [F3] a second time with the Room Location Lookup displayed will perform an item master lookup.

If a room location is not entered for a particular item, it will be grouped in the miscellaneous room. The description for the miscellaneous room for your company is established on the 7<sup>th</sup> screen of "Main Options" and can be changed by your system administrator if desired.

DESCRIPTION FOR MISCELLANEOUS ROOM: \*\* Bulbs & Misc \*\*\*\*\*

Sample Line Item Screen with Room Locations									
mm/dd/yyyy		POINT OF SALE				MAN			
Order: 2959	Cust: 5521045	Name: JOHN SULLIVAN							
Column: A +/-	0.000%	Special: B	Ship: PICK UP	Slp: GA	Lines: 0				
Tax: Y MO	7.2500%	CR: 10000	Status: O	mm/dd/yyyy	Type: L				
Ln#	Item Number	VC	Ordrd	Dlvrd	Bkord	TFL	Sell Price	Total	
2	**FOYER								
1	40421	CAR	1			Y	118.500	118.50	
3	1148AB	KIC	1			Y	11.340	11.34	
5	**FAMILY ROOM								
4	FC52AB	CRA	1			Y	104.540	104.54	
6	B5/52S-LOK	CRA	1			Y	13.370	13.37	
8	**LIVING ROOM								
7	1148AB	KIC	1			Y	11.340	11.34	
<hr/> Qty: 1    Item: _____    VC: ____    Tax: Y    Prc: _____ Stk: _ _ _    Room: _____    Loc: _____    Flg: _    Cost: _____ Info: _____    Net: _    Disc: _____ Desc: _____    LBR : _____ F2=TO QTY    F3=INQUIRY    F4=ALT/SUPER    F7=UPC TOGGLE    F8=AUTO TOGGLE    TAB=TOTAL									

### How to Enter Info and Sales Notes for an Item

After entry of the Room location, the cursor rests in the **Info** field. Enter a note in the "**Info**" field is strictly **optional**. Enter a note only if you wish to include additional information about this item on the sales order. Press **Enter** after typing in an Info note and the cursor will move to a 4-character field. This is the "print flag" field where you specify on which type of forms the note should print. (If you do not want your note to print on any form or job label, press **Enter** past the print flag field leaving it blank.) Any or all of the following four print flags (PIQL) may be used:

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**P** (Pick Ticket type form). These types of forms are usually printed when the order is in an Open or Hold status. They are typically labeled Pick Ticket, Sales Order, Packing Slip, Delivery Ticket, Order Acknowledgment, etc.

**I** (Invoice form). An invoice form is typically printed when the order has been closed.

**Q** (Quote form). Quote forms are printed for order type Q.

**L** (Job Label). The first sales note with an “L” flag will print on the job label *if* your job label is “defined” to print sales notes.

The note in the “Info” field becomes the first sales note for the item. If additional sales notes are needed OR if you need to write a note for **Purchasing**, press **Enter** to move the cursor to the price field. (If changing the price is not allowed on your system, your cursor may skip over the price field.)

Next, press **[F12]** and **S** for **S**ales notes to open the Sales Notes screen.

POS SALES NOTES		AAA 12345-PB
SAMPLE FIXTURE POLISHED BRASS		
SEQ	PRTF	PO Information
10	PI	NOTE TO PRINT ON PICKTICKET & INVOICE
20	P	NOTE PRINTS ON P/T (PICKTICKET) ONLY.
30	P B	NOTE PRINTS ON P/T, PO & RECEIVING REPT
40	_____	_____
50	_____	_____
60	_____	_____
70	_____	_____
80	_____	_____
90	_____	_____
100	_____	_____
F2=UP F3=SAVE-SELL F7=NEXT F8=PREV TAB=900 NOTES		

- **PRTF** - Enter the print flag(s) in the PRTF column (PIQL).
- **PO** – Leave **blank** unless this note is needed for purchasing. Flag “**P**” will print the note on the Purchase Order; “**R**” will print the note on the purchasing receiving report; “**B**” prints the note on both the purchase order and receiving report.
- Begin typing in the sales note. Text wraps around automatically. The PRTF flags copy automatically for multiple lines.
- Refer to function keys at bottom of screen box for cursor movement.
- Press **F3=SAVE-SELL** to save sales notes and return to the line item entry screen.

### Price and Cost Fields

If your company allows changing the sales price, the cursor will rest in the **Prc:** field. If the price is correct, simply press **[F10]** to sell the item. If you need to change the selling price, press the **Delete** key to “blank out” the price and type in the correct price.

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On Point-of-Sale counter terminals or PC's, the Cost field is typically not displayed. In some cases, the cost is displayed on "back office" terminals or PC's. These options are set up by your system administrator.

### Discount Field

Some companies allow salespersons to enter a line item discount percent. This discount percent should be typed in the Disc field.

### Press [F10] to Sell an Item

At any point during line item entry, press [F10] to sell the item. For example, after entering the room location, you may press [F10] if additional sales notes are not needed and the selling price is correct.

### INSUFFICIENT QAV - Alternate Sell Lost speCial Bko Partialbko Nosale Qrv -

Refer to the sample screen below. The QAV (quantity available) is zero. Notice the S/O next to the Stk field. The S/O means the item is a "special order" item.

mm/dd/yyyy	POINT OF SALE				MAN		
Order: 2959	Cust: 5521045	Name:	JOHN SULLIVAN				
Column: A +/-	0.000%	Special: B	Ship:	PICK UP	Slp: GA	Lines: 0	
Tax: Y MO	7.2500%	CR: 10000	Status: O	mm/dd/yyyy	Type: L		
Ln#	Item Number	VC	Ordrd	Dlvrd	Bkord TFL	Sell Price	Total
AC	QAV: 0						
___	Qty: 1	Item: 45165	VC: CAR	Tax: Y	Prc: _	216.000	
Stk:	S/O	Room:	Loc: _STOCK	Flg: _	Cost: _____		
Info:						Net: Disc: 0.000	
Desc:	227B 26X30 GREEN W/GOLD RECT.					LBR: 0.00	
F2=TO QTY F3=INQUIRY F4=ALT/SUPER F7=UPC TOGGLE F8=AUTO TOGGLE TAB=TOTAL							
INSUFFICIENT QAV - Alternate Sell Lost speCial Bko Partialbko Nosale Qrv -							

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 QAV - 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.

In the example shown below, a "C" was chosen to speCial order the item. The "S" in the FL column indicates the item was "Special ordered." A "B" appears if the item is backordered. Normally, a "B" is used when there is insufficient quantity for an item that you typically stock.

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mm/dd/yyyy	POINT OF SALE				MAN			
Order: 2959	Cust: 5521045	Name: JOHN SULLIVAN						
Column: A +/-	0.000% Special: B	Ship: PICK UP	Slp: GA	Lines: 2				
Tax: Y MO	7.2500% CR: 9784	Status: O	mm/dd/yyyy	Type: L				
Ln#	Item Number	VC	Ordrd	Dlvrd	Bkord	TFL	Sell Price	Total
1	45165	CAR	1		1	YS	216.000	216.00
Qty: 1    Item: _____    VC: ____    Tax: Y    Prc: _____ Stk: _ _ _ _    Room: _____    Loc: _____    Flg: _    Cost: _____ Info: _____    Net: _    Disc: _____ Desc: _____    LBR : _____ F2=TO QTY    F3=INQUIRY    F4=ALT/SUPER    F7=UPC TOGGLE    F8=AUTO TOGGLE    TAB=TOTAL								

### Change a Line Item on a Quote or "L" Type Order

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.

### How to Change a Room Location for an Item

If an item has the wrong room location, call down the line number FOR THE ITEM. Press [Enter] to move cursor to the room location field. Change it by typing in a new room location (or code) or use [F3] lookup to select a new room location. Press [F10] to save the line item with the new room location. The line item screen will now display the item grouped under the new room location.

### How to Change the Room Location Description for a Group of Items

For quotes and "L" type orders, the Point-of-Sale program allows you to change the room description for an existing room location line. This may be desirable when a typing error was made for a Room Location.

To change a room description, call down the line number of the room location line. You'll notice the current room location is displayed in both the "Item" and the "Desc" (description) fields. The "Room" field itself will be blank. Press 1 in the Qty field to move the cursor to the "Room" field. Type in the new room location, type in the room code/abbreviation, or press [F3] to look up a new room location and select one. Press [F10] to save. (Note: it is not necessary to change the "old" room location you see displayed in the "Desc" field. The system will automatically update this when you save your change.)

Users are also allowed to change the room location of a room location line by "typing over" the room location displayed in the "Desc" (description) field. If you choose this



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method, please be aware that the room location is limited to 24 characters even though the “Desc” (description) field is 30 characters. If a longer description is entered, it will be truncated to 24 characters.

### Delete Line Item from a Quote or “L” Type Order

On the line item screen, use the [Up Arrow] key to move the cursor to the Ln# field. Enter the line# to be deleted and press [Enter]. The line item 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. If you attempt to delete, the following message displays:

CAN NOT DELETE ITEM. ITEM OR RELATED ITEM HAS PARTIALLY SHIPPED

### How to Enter a Not-on-File Item for Special Ordering in Point of Sale

On POS Line Items screen, enter the quantity to order.

Enter the item number to be special ordered. If the item is not in your inventory file, a message displays “RECORD NOT FOUND” indicating the item was not found in the item master file.

Qty: 1	Item: 47004	VC: ____	Tax: Y	Prc: _	_____
Stk: _	Room: _____	Loc: _____	Flg: _	Cost: _____	_____
Info: _____			Net: _	Disc: _____	_____
Desc: _____			LBR: _		_____
F2=TO QTY F3=INQUIRY F4=ALT/SUPER F7=UPC TOGGLE F8=AUTO TOGGLE TAB=TOTAL					
RECORD NOT FOUND << STATUS 103 >> #30 3219					

Enter a valid vendor code.

Enter a Room location if desired.

Enter a description for the item in Desc field as needed or desired.

Enter the selling price in the Prc field.

Enter the Cost of the item in the Cost field. (Consult your system administrator about whether to enter the cost or leave it blank.)

Optional: enter line item discount in Disc field.

At the INSUFFICIENT QAV prompt, select “C” to speCial order the item.

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```

___ Qty: 1      Item: 47004      VC: CAR  Tax: Y Prc:      226.000
Stk: _ _ _ _  Room:**BEDROOM 2  Loc: _____ Flg: N Cost:      84.000
Info:          _____      Net:  Disc:      0.000
Desc: WOOD-BEVEL-27X33          LBR :      0.00
F2=TO QTY  F3=INQUIRY  F4=ALT/SUPER  F7=UPC TOGGLE  F8=AUTO TOGGLE  TAB=TOTAL
INSUFFICIENT QAV - Alternate Sell Lost speCial Bko Partialbko Nosale Qrv - C
    
```

This places the quantity in both the ordered (Ordrd) and backordered (Bkord) columns. The "S" in the "F" column indicates it is a special order item and will be "picked up" on the next purchase order run for this vendor.

Ln#	Item Number	VC	Ordrd	Divrd	Bkord	TFL	Sell Price	Total
2	**BEDROOM 2							
1	47004	CAR	1		1	YS	226.000	226.00

### How to Sell Labor on a Point-of-Sale Ticket

Typically, one or more labor items are set up in the Item Master Inventory file for the sale of Service or Labor. Item number "LABOR" with vendor code LBR is an example.

These Labor items have an "L" in the LBR field in the item master indicating that they are labor items. The selling price and cost of the labor items in the item master are often left at zero to allow the salesperson to enter the labor charge on Point of Sale orders. Some companies enter in the labor charge for specific labor items.

Find out from your system administrator which labor or service item numbers to use on sales orders.

In the example that follows, the item number **LABOR** with vendor code **LBR** will be used. This sample labor item is set up as non-taxable with no price or cost.

In the sample below, a quantity of 1 and item number **LABOR** was entered. The "Tax" field contains an "N" indicating that labor is non-taxable. When selling Labor, leave the normal Prc and Cost fields as ZERO. **Enter the labor charge in the LBR field, next to the L.** See the sample screen below displaying a \$74.56 labor charge.

```

99 QAV:
___ Qty: 1      Item: LABOR      VC: LBR  Tax: N Prc:_      0.000
Stk:  S/O      Room:          Loc:  Flg:  _ Cost:      0.000
Info:          _____      Net:  Disc:      0.000
Desc: SERVICE LABOR          LBR :L  74.56
F2=TO QTY  F3=INQUIRY  F4=ALT/SUPER  F7=UPC TOGGLE  F8=AUTO TOGGLE  TAB=TOTAL
    
```

Refer to the column heading "TFL" which represents "T"axability, "F"lag and "L"abor. You'll notice NLL in this column when selling Service Labor (item# LABOR): "N"o for Taxability, "L" in the Flag column meaning Labor, and "L" in the Labor column.

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After selling a labor item, the screen will look similar to what is shown below.

Ln#	Item Number	VC	Ordrd	Dlvrd	Bkord	TFL	Sell Price	Total
1	LABOR	LBR	1			NLL	0.000	74.56

On the Totals page of the order, the labor sales amount is NOT included in the Price Subtotal. It is displayed in a separate "Labor" field. It is included in the Total and reflected in the Balance Due.

### Order Closing Screen

From the Line Items screen, pressing the **[TAB]** key will take you to the Closing screen. This is often referred to as the "Totals Page."

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

Your cursor will be positioned in the Current Payment field.

### Freight and Other Charges

To enter a freight/shipping charge, press the Up Arrow key twice. Enter the amount in the **Freight** field. Press Enter. The cursor moves to the **Other Charges** field. This field is often used to enter a **Restocking Fee**. Press Enter again and the cursor returns to the Current Payment field. The Total and Balance Due now reflect freight and other charges entered.

### Taking a Cash Payment

- Enter the **Current Payment**. If you are collecting the full balance, press the [TAB] key. If you are collecting part of the balance due (such as a 50% deposit), enter the amount in the Current Payment field. (Note: there is an option that can be set by terminal to automatically calculate the current payment on special orders. Your system administrator can contact Mylee customer support for instructions.)
- Enter the **Rec Method**. The Receipt or Payment Methods are displayed on the screen (see methods 1 through 6). If paying by cash or check, you must enter the amount received in the **Amt** field. If you are using pay types 3 – 6, the Amt will prefill.
- Press the **[TAB]** key to accept the payment. If the payment is a partial payment, the order is placed in a HOLD status.

In the example shown below, a payment of \$120.00 was taken by pay method 3 (Visa/MC). The order is in a Hold status with a balance due of \$111.66.

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```

mm/dd/yyyy                POINT OF SALE
Order: 2959                Cust: 5521045      City/State: ST. LOUIS      MO
Name: JOHN SULLIVAN        Zip: 63021      Phone: (314) 632-5541
Address: 1011 MARKET ST   Contact:
Address:                    Terms Code: A 2% 10TH NET PROX
Price Level: A Adjustment: 0.000%      Tax - Flag: Y Cd: MO      Percent: 7.2500%
Spec Price: B              Status: H mm/dd/yyyy mm/dd/yyyy Ln: 2
P.O.#: N                   Avail CR: 9888      Ship: PICK UP      Age: 1 Slm:GA      Type: L
-----ORDER CLOSING-----
Price Subtotal:           216.00                Special:           216.00
Discount:                 0.00                Discountable Amt: 216.00
Tax: 7.2500               15.66                Labor:            0.00
Deposits:                 120.00      Freight:          0.00      Other Charges:    0.00
Allowance:                0.00      Taxable:          216.00      Nontaxable:       0.00
+-----+ Tax Disc:      0.00                FET:              0.00
Total: | 231.66 | Sales: 216.00      Returns:          0.00
Balance Due: | 111.66 | Cost: Gross Profit %:
+-----+ 1 = CASH      2 = CHECK      3 = VISA/MC
Current Payment:         4 = AMEX/DISCV 5 = GIFT CARD 6 = REFUND CHK
REC Method: 3 Amt:      120.00      REC Method:      Amt:
Accts. Receivable:
Change *****      0.00 *****
F2=ENTER DISC  F7=RETURN ENTER MORE  F8=ACCUMULATE DISC  TAB=TOTAL
    
```

### Taking the Overage Payment on a House Order with Builder Allowance

If your sales order is a house job with a builder allowance, the allowance amount would have been entered on the Order Heading screen. If you have not yet entered the builder allowance, press **[F12]** and **"H"** to go to the Order Heading screen.

Press the Up-arrow key to "back up" to the **"Allow"** field on order header. Enter the builder allowance amount in the Allow field. Example: **Allow: 1000.00**

Press [Enter] to move to the Type field (L) and press [Enter] to go to the line items page. Press TAB for totals page.

On the closing totals page, the allowance amount displays and is subtracted from the Total to calculate a **Balance Due**. The Balance Due displays the overage amount to collect from the homeowner. In the example below, the \$1000.00 is subtracted from the Total of \$2354.00 for a Balance Due of \$1354.00.

```

Price Subtotal:           2200.00
Discount:                 0.00
Tax: 7.0000               154.00
Deposits:                 0.00
Allowance:                1000.00

Total:                    2354.00
Balance Due:              1354.00

Current Payment:         0.00
REC Method: 1 Amt:
Accts. Receivable:
    
```

Enter the Amount in "Current Payment" or press TAB to bring the Balance Due into Current Payment.

## Point-of-Sale Basic Training Special Orders & House Jobs

Enter the REC Method (1=Cash, 2=Check, etc.) for payment by the homeowner as you would normally. (Enter the amount next to "Amt:" and press TAB to accept the payment.) Using the example, \$1354.00 displays in "Deposits." The Balance Due is now \$1000.00 which will later be closed to Accounts Receivable.

Price Subtotal:	2200.00
Discount:	0.00
Tax: 7.0000	154.00
Deposits:	1354.00
Allowance:	1000.00
<b>Total:</b>	<b>2354.00</b>
<b>Balance Due:</b>	<b>1000.00</b>
<b>Current Payment:</b>	
REC Method: 3 Amt:	1354.00
Accts. Receivable:	
Change *****	0.00 *

Accepting the payment from the homeowner puts the ticket in a Hold status. You may print an invoice form or a special form (e.g. "Order Acknowledgement," "Sales Order") for the homeowner. (The Allowance field is an available field for printing in the totals section of custom forms.)

### Print an Order Acknowledgement for Special Order or House Order

While on the Closing screen, press **[F4]** to print the order. The print menu displays. Select the printer if different from the default. Select the document (type of form) you want to print. If the order is still open, the system will default to a Pick Ticket, however, you may select any type of form from the pop-up print menu.

Typically, a custom form will be set up for deposit or "hold" orders. Choose the appropriate form. It may be labeled Acknowledgement or Special Order. In the example below, "A" for Order Acknowledgement is the selected document.

Select Printer:	1	( 1=Default R=Receipt)
Select Document:	A	
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		

### Searching for Customer Orders by Name, Lot# or Partial Address

To check the status of items on a special order or house job, press [Up Arrow] on the order header screen to move the cursor to the order number field. Enter the order number. If you do not know the order number, you can search for it by entering the customer's name, lot number or part of an address *in the Name field* and press **[F8]**. Refer to the example below. The last name of "SULLIVAN" is entered followed by [F8].

## Point-of-Sale Basic Training Special Orders & House Jobs

mm/dd/yyyy	POINT OF SALE	CUST NAME
Order: _____ Cust: _____	Column: _ +/- _____% Spec: _ Prompt: _	
Name: SULLIVAN _____	Tax: _ _____% Age: _	
Address: _____	Terms: _ _____	Slp: _
		PSlp: _
City/St: _____	Status: _ _____	Lines: _
Zip: _____ (____) _____		
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		

The program searches the name & both address lines for "SULLIVAN" and finds the first "match." If this is the order you are looking for, press **[F10]** to select it. If not, continue pressing **[F8]** until you find the order and then press **[F10]**.

mm/dd/yyyy	POINT OF SALE	CUST NAME
Order: 2959 Cust: 5521045	Column: A +/- 0.000% Spec: B Prompt:	
Name: JOHN SULLIVAN	Tax: Y MO _____% Age: 1	
Address: 1011 MARKET ST	Terms: A _____	Slp: GA
		PSlp: GA
City/St: ST. LOUIS MO	Status: H mm/dd/yyyy mm/dd/yyyy	Lines: 2
Zip: 63021 (314) 632-5541		
Contact: _____	Stage Loc: _____ Deliver: _____	
Credit: _____ Allow: 0.00	P.O.#: N Ship: PICK UP Type: L	
Bill To		
Name: JOHN SULLIVAN		
Address: _____		
City/St: _____		
Zipcode: _____		
F2=TO NAME F3=INQ F4=PRT TTL F7=NXT ODR CUST F8=PRV ODR CUST TAB=SUM TTL		

### Checking the Backorder Status of the Special Order

Enter the order number or search for the order using the **[F8]** search key as described on the previous page.

With an order displayed on the order header screen, press **[F12]** for the Action Menu. Select **Bko Status** to display the status of items backordered on this ticket.

## Point-of-Sale Basic Training Special Orders & House Jobs

BACKORDER STATUS FOR ORDER						
LN#	VC	ITEM	QTY	P.O.#	STS	DATE
1	CAR	45165	1	1312	ORD	mm/dd/yyyy
227B 26X30 GREEN W/GOLD RECT.						

In the example shown above, the special order item 45165 (vendor code CAR) was ordered on Purchase Order number 1312. The PO# field would be zero and the STS (status) and Date would be blank if the item had not yet been placed on a purchase order.

After the item has been received into the warehouse or store, the receiving program automatically “fills” the backordered quantity on the customer order.

The customer can be contacted that the merchandise has arrived and pickup or delivery scheduled.

Press [F12] and Exit to exit from the Backorder Status screen.

### How to Enter an Order Heading Note

A note that applies to the “whole order” may be typed by the salesperson and printed on a pick ticket, invoice and/or quote. An order heading note prints in the body of the order *before* any line items print. Some salespeople use the order heading note to type directions to the job site for the delivery driver.

To type an order heading note, read up the order number and press [F12]. Select ‘T’ for order noTes from the Action box.

— ACTION —
Exit
pArtilal ship
Bko status
Menu
cust Notes
Open scrn
Resume
order noTes
calcUlate

The **PRTF** column is the print flag column. This is where you specify on which form the note should be printed. Use any or all of the following: **P** for pick ticket, delivery ticket; **I** for Invoice; **Q** for Quote.

Begin typing your note in the Information field. Text will automatically wrap to the next line and fill in the print flag.

In the example below, directions to the job site were typed to be printed only on the pick ticket / delivery form. Press [F3] to Save your notes and exit the notes screen.

## Point-of-Sale Basic Training Special Orders & House Jobs

```

ORDER HEADING NOTES

SEQ  PRTF  Information
10   P    SOUTH ON HWY 270 TO HWY 44 WEST. EXIT
20   P    BOWLES AVE AND TURN LEFT. GO 1.2 MILES
30   P    AND TURN RIGHT INTO WHISPERING LAKES
40   P    SUBDIVISION.
50   _____
60   _____
70   _____
80   _____
90   _____
100  _____

F2=UP  F3=SAVE-EXIT  TAB=900 NOTES
    
```

### Collecting the Balance Due on Special Orders

When the order is ready to be shipped, select Point-of-Sale and call up the order by entering the order number or searching by name, lot number or address.

After finding the order, the cursor rests in the "L" type field. Press [Enter] to display the line items page.

```

mm/dd/yyyy          POINT OF SALE          MAN
Order: 2959          Cust: 5521045          Name: JOHN SULLIVAN
Column: A +/-       0.000% Special: B Ship: PICK UP      Slp: GA Lines: 2
Tax: Y MO           7.2500% CR: 9888 Status: H mm/dd/yyyy mm/dd/yyyy Type: L

Ln# Item Number          VC  Ordrd  Dlvrd  Bkord TFL Sell Price      Total
1  45165                  CAR    1          Y      216.000    216.00
2  mm/dd/yyyy-PAID VISA          $      120.000    120.00

____
Qty: 1          Item: _____ VC: ____ Tax: Y Prc: _____
Stk: _____ Room: _____ Loc: _____ Flg: _ Cost: _____
Info: _____ Net: _ Disc: _____
Desc: _____ LBR : _____
F2=TO QTY F3=INQUIRY F4=ALT/SUPER F7=UPC TOGGLE F8=AUTO TOGGLE TAB=TOTAL
    
```

You'll notice the deposit the customer paid previously as a line item on the order.

You'll also notice that the quantity now displays in the Ordrd column rather than the Bkord column because the backorder/special order item has been filled.

Press [Tab] to go to the Totals page to collect the balance due.

- Enter the Current Payment and press [Enter].



## Point-of-Sale Basic Training Special Orders & House Jobs

- Select a REC Method. In the example below, the balance due of \$111.66 is being paid by check. Enter the \$111.66 in the Amt field and press [Enter].

```

mm/dd/yyyy                POINT OF SALE
Order: 2959                Cust: 5521045        City/State: ST. LOUIS        MO
Name: JOHN SULLIVAN        Zip: 63021        Phone: (314) 632-5541
Address: 1011 MARKET ST    Contact:
Address:                    Terms Code: A 2% 10TH NET PROX
Price Level: A Adjustment: 0.000%        Tax - Flag: Y Cd: MO        Percent: 7.2500%
Spec Price: B                Status: H mm/dd/yyyy mm/dd/yyyy Ln: 2
P.O.#: N                    Avail CR: 9888        Ship: PICK UP        Age: 1 Slm:GA Type: L
-----ORDER CLOSING-----
Price Subtotal:            216.00                Special:                0.00
Discount:                  0.00                Discountable Amt:      216.00
Tax: 7.2500                15.66                Labor:                 0.00
Deposits:                  120.00        Freight:              0.00        Other Charges:        0.00
Allowance:                 0.00        Taxable:             216.00        Nontaxable:          0.00
Total:                      +-----+        Tax Disc:           0.00                FET:                 0.00
Balance Due:                | 231.66 |        Sales:             216.00        Returns:             0.00
                          | 111.66 |        Cost:
                          +-----+        1 = CASH            2 = CHECK            3 = VISA
Current Payment:          111.66        4 = PRIOR DEP.      5 = TEMPORARY        6 = REFUND CHK
REC Method: 2 Amt:        111.66        REC Method:          Amt:
Accts. Receivable:
Change *****          0.00 *****
F2=ENTER DISC F7=RETURN ENTER MORE F8=ACCUMULATE DISC TAB=TOTAL
    
```

- Press [Tab] to accept the payment. Respond "Y" to close the order and use [F4] to print an invoice.

### Closing an Order with an Allowance Amount to Accounts Receivable

When a sales order has a lighting allowance, the amount over the allowance is paid by the homeowner. The balance due (the allowance amount) is paid by the builder and is typically closed to **Accounts Receivable**.

After items have been delivered and you are ready to close the order, read up the order in Point of Sale and go to the totals page. Assuming no changes have been made to the order and the homeowner paid the full overage, the Balance Due will display as 0.00.

**This is because the Balance Due is the amount due from the homeowner. The homeowner has paid the overage, so the Balance Due is zero.**

```

Price Subtotal:            2200.00
Discount:                  0.00
Tax: 7.0000                154.00
Deposits:                  1354.00
Allowance:                 1000.00

Total:                      2354.00
Balance Due:                0.00

Current Payment:          0.00
REC Method: Amt:
Accts. Receivable:
Change *****
    
```

**Point-of-Sale Basic Training Special Orders & House Jobs**

To bill the builder for the allowance, simply press **TAB** in the Current Payment field. Tag-n-Trak will display the \$1000.00. The cursor will be resting on Rec Method 0 for Accounts Receivable.

Current Payment:	1000.00
REC Method: 0 Amt:	

Press TAB again to close. Respond "Y" to **CONTINUE TO CLOSE ORDER Y OR N**.

An invoice form may be printed for the builder by pressing the [F4] key and selecting the form.