

Point of Sale - Unlocking an Order In Use

How to Unlock an Order in Use

An order in use should be unlocked ONLY after determining no one else is using the order. Inappropriately unlocking an order may cause an Internal Audit Error or cause the “balance due” on the order to not reflect payments taken. Please read the information in this document that explains under what conditions an order is locked and when it is appropriate and not appropriate to unlock an order. Contact Mylee Customer Support with any questions at 636-326-9994 Ext 12 or email tnhelp@mylee.com.

- Enter the Order Number on the Point of Sale header page. With the cursor positioned in the “Order Type” field, press Enter. If the order is locked, a message displays: **ORDER IS IN USE**

- Press the **F6** function key. A message will display:

DO YOU WANT TO UNLOCK ORDER Y OR N. Respond **Y**.

- **PLEASE ENTER PASSWORD TO UNLOCK –**

Enter the password for your salesperson ID (two alphanumeric characters) and then press ENTER.

- A salesperson must have permission to unlock an order. Please refer to the **Allow Unlocking Orders** field in the salesperson record.
- Tag-n-Trak creates a special order heading note when an order is unlocked. The note includes the salesperson ID who unlocked the order along with the date and time: **XX Unlocked order on MM/DD/YYYY at HH:MM**

To view the order heading note, read up the order, press **F12** for the Action Box, **T** for **order notes**, and then press the **TAB** key. Pressing the TAB key displays the special 900 series notes. Only salespeople with permission to unlock orders will be able to view the note.

Two Types of “Locks” – Order is in Use Lock & Daily Close Lock

There are two basic types of Point of Sale order “LOCKS.” The first type is an “Order is in Use” lock and the second type is a “Daily Close” lock. An order is locked under the following conditions:

(1) Order is in Use

- a. A user has an order “read up” and is working on the line items or order closing screen.
- b. A user has an order “read up” and is working on the line items or order closing screen and then “chains out” by using F12 and M to work in another program.
- c. A user with a PC has an order “read up” and is working on the line items or order closing screen and closes his or her TinyTerm session without properly exiting.
- d. A user has an order “read up” and is working on the line items or order closing screen when the terminal locks up and another user kills their terminal.

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- e. A user has an order “read up” and is working on the line items or order closing screen when a shutdown is performed or when the unix server reboots due to a system problem, hardware malfunction, or power failure.

(2) Daily Close Lock

The Daily Close is processing the order.

The two types of locks are explained in detail below.

- (1) **Order is in Use Lock**. When a user "reads up" an existing order or creates a new order, the Point of Sale program puts a Lock on it. The Lock Flag is Y in the POS Order Header. Refer to the following examples of when the Lock Flag is Y for Yes:

- a. User1 has an order "read up" on their terminal. User2 tries to "read up" the same order. User2 will see a message displayed at the bottom of the POS order header screen: **ORDER IS IN USE**

User2 needs to wait until User1 is finished working on the order. **Do NOT unlock an order that is "in use" by someone else.**

Unlocking an order that someone else is using will likely cause an **Internal Audit Error** on the order. An internal audit error occurs when the extended sales of the line items do not equal the price subtotal on the Order Closing screen (“totals page”). This is the result of two or more users accessing an order at the same time. When an Internal Audit Error occurs, the order must be copied to a new order and then the original order must be deleted.

- b. User1 is working on the line items or order closing (“totals”) screen of a Point of Sale order. User1 decides to “chain out” of this point of sale order by pressing F12 and M for Menu to work on inventory, accounts receivable, run a query, etc. **The order this user was working on is LOCKED the entire time the user is “chained out” working in other programs.** User2 attempts to “read up” the same order and sees the message **ORDER IS IN USE**.

User2 needs to wait until User1 is finished working on the order. The order should not be unlocked in this situation. It is not apparent that User1 has the order locked, because User1 “chained out” of the order and is currently working in another program. For this reason, **it is recommended that users NOT “chain out” of a point of sale order by using F12 and M if they will be “chained out” for any length of time.**

- c. A user connected to Tag-n-Trak with a PC and TinyTerm has a point of sale order “read up.” While in the midst of the order, the user simply closes his or her TinyTerm session. The order is LOCKED because the user improperly exited. If a user attempts to access that order, the ORDER IS IN USE message will display. In this situation, the order needs to be UNLOCKED. Verify that the

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person who improperly exited has been trained on how to properly exit an order and log off.

- d. User1 is working on an order and has a terminal problem. Another user "kills" the terminal # of User1. The order still has a Lock Flag of Y. When anyone attempts to access the order, a message will display: ORDER IS IN USE.

In this situation, no one else has the order "read up." It is recommended that you Unlock the order.

- e. User1 is working on an order when their terminal "reboots," a system shutdown is done, a power failure occurs, or the system "goes down" due to some type of hardware failure. The order still has a Lock Flag of Y. When anyone attempts to access the order, a message will display: ORDER IS IN USE.

In this situation, no one else has the order "read up." It is recommended that you Unlock the order.

- (2) **Daily Close Lock**. The Daily Close momentarily locks an order as it is processed and then unlocks it. The Lock Flag in the POS order header is "D" temporarily while it is processed. The Daily Close processes Closed orders that have not yet been through a daily close and Hold orders with Payments that have not yet been through a daily close. The chance is small that a user will try to "read up" an order at the exact moment it is processed by the daily close. However, should it happen, the program will display an "Order is In Use" message. (Note: The system does not allow unlocking an order that is being processed by the daily close.)

NOTE: If you run the daily close during normal business hours, you may occasionally see the following message printed on the order register:

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***** ORDER NUMBER 123456    IS LOCKED AND THE DAILY CLOSE CAN
NOT PROCESS THE ORDER *****
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This typically means a user had an order "read up" that the daily close was attempting to process. The daily close cannot process an order that is "in use" (Lock Flag of Y). This is a normal occurrence. The order will get processed on the *next* daily close (assuming it is not locked when the *next* daily close is run).

Important Note: The error message COULD mean that the order is locked because a user had it "read up" when their terminal was killed, their terminal rebooted, a system shutdown was done or a hardware failure occurred. If this was the case, you need to Unlock the order so that it can be processed by the next daily close. So how do you know? Here are some indicators:

- Verify no one has the order "read up." Try to go to the line items screen of the order. If you do NOT get an "Order is in Use" message, then someone simply had the order

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"read up" during the daily close and the order is no longer locked. The order will get processed on the next daily close.

- Verify no one has the order "read up." The best time to verify this is "after hours" when all users should be logged off. Try to go to the line items screen of the order. If you get the "Order is in Use" message, then the order needs to be Unlocked so that it can be processed by the next daily close.
- If you see the SAME order number in the error message printed on the Daily Close report on two or more consecutive days, this is a good indicator that the order is locked due to kill terminal, terminal reboot, system shutdown, or hardware failure. Verify that no one has the order "read up," and then Unlock the order.