

How to Sell a Related Item

Related Item Screen in Point-of-Sale

A bulb sold with a lighting fixture is the most common use of Tag-n-Trak’s “related item” function. When a related item is sold, the Related Item Screen displays. Full editing of related items is allowed, including: adding items, deleting items, changing the item number, changing quantity or price. (You can even look up catalog kits and select any or all items from the catalog to be included as related items.) Below is the layout of the related item screen.

RELATED ITEM SCREEN									
								Qav:	0
VC: AAA	Item: 12345-WH			Qty:	1	Shp/Dlv			
Note: PIQL		Room: **DINING ROOM				0	Shp:		
						0	Dlv:		
Ln	Item / Description	VC	Qty	Rsrvd	Bkord	Dv/Loc	Tx	Nt	Price/Cost
---	60A	BLB	2	2		LB	Y	I	1.000
	A-19 130V-60W			0			Y		0.270

F2=Clear entry F3=Lookup F7=Inv Note F8=Sls Note F9=Clear all Tab=Sell/Exit									

There are five ways to get to the related item screen from the Point-of-Sale line item screen.

1. The Related Item Screen displays automatically after selling an item that has a related item.
2. The Related Item Screen displays automatically after selling a not-on-file item in which the vendor code master is flagged “Y” for “Non-Stock Related Item.”
3. After an item is “read up” but prior to selling the item , press <F12> for the action menu and then ‘L’ for “reLated item.” After selling the item, the Related Item Screen will display.
4. Read up an existing line item, press <F12> for the action menu and then select ‘L’ for “reLated item.”
5. Read up an existing related item and the screen will immediately change to the related item screen.

The top left portion of the Related Item Screen displays information about the fixture -- description, room location, order quantity, quantity tagged for shipment, delivered quantity. The upper right corner of the screen displays the Quantity Available (Qav) of the related item (that is currently “read up”). For an existing related item (one that has

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been sold with a fixture), the upper right portion of the screen (below Qav) displays the quantity “Tagged for Shipment” or “Delivered.”

The body of the screen is where related items are sold. To tell the difference between related items that have already been sold and those that are suggested for sale, look at the left most column which contains the line number. If a line number exists, then the item has been sold. Otherwise, it is just a suggested item for sale. (The first time the Related Item Screen displays after selling a fixture that has related items set up in the main inventory file, there will be no line numbers.)

Up to six items display at one time on the Related Item Screen. To view more than six, use the [PG DN] to scroll forward and [PG UP] to scroll backward. Use [UP ARROW] and [DN ARROW] to move among multiple related items while in the item number field and no fields have been changed. Once the cursor is past the item number, use [UP ARROW] and [DN ARROW] to move to and edit fields for that specific related item.

To add a related item for a fixture, simply type the item number in the Item field on the Related Item Screen. The [F3] Item Master Lookup feature is available to help find the correct related item number.

Item Qty. The “Item Qty” field just after the Vendor code is the quantity needed for one fixture. This field displays automatically if the related item is set up in the main inventory file for a fixture. If adding a related item for a fixture, enter the Item Qty. The program calculates the total quantity of bulbs needed based on the order quantity of the fixture. If the bulb quantity available is insufficient, the program automatically backorders the remainder.

Rsrvd/Bkord. When selling the item, a warning message displays ‘Insufficient Quantity for Item’ if the quantity needed is not available. Press [F10] again to sell what is available with the remainder backordered. The Rsrvd (reserved) quantity can be manually changed. When the Rsrvd quantity is changed, the program will automatically adjust the Bkord quantity. The automatic adjustment is done to ensure that the sum of the Rsrvd and Bkord quantities is equal to the total (bulbs) needed.

For example, assume you are selling a quantity of four of a light fixture that requires two bulbs each. Eight bulbs are needed. If there are only three bulbs available, the program will display three in Rsrvd and five in Bkord. You can manually enter a zero in Rsrvd; the program will adjust the Bkord quantity to eight. If you change the Rsrvd to eight, the program adjusts the Bkord to zero. There is no backorder fill popup screen. You simply change the Rsrvd quantity field and the backorder quantity will automatically adjust.

Editing Related Items. The following fields can be edited for a related item: (Dv) Division code; (Chrg) Charge for related item flag; (Rm) Room location flag; Price/Cost (depending on salesperson permissions); Description; (Loc) Bin location; (Tx) Taxability flag; (Nt) Net Item flag.

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Changing & Deleting Related Items. Other editing features include: changing the related item number after the item has been sold by simply “typing over” the existing related item; deleting a related item with [F6] function key; changing price and cost (as permitted by salesperson ID). After partial shipping a related item, editing is allowed with the following restrictions: (a) the price or cost may not be changed; (b) the item number may not be changed; (c) the quantity may not be reduced below what has already been shipped.

Function Keys on Related Item Screen. Inventory notes for related items can be viewed by using the [F7] function key. Sales notes can be added or changed for a related item by using the [F8] function key. The [F9] function key will clear the entire screen of items that have not been sold. Pressing the [F2] function key while on a line that has not yet been saved will clear the line for entry of a new item. Pressing [F10] will sell the related item or save changes to an existing item. Pressing [TAB] while on the related item screen will sell all related items (that have not yet been sold) and return to the items screen.

Catalog Kits as Related Items. Another new feature of the related item screen is the ability to use “Catalog Kits.” A catalog kit is an item number in inventory that is flagged with a ‘C’ in the Kit field. Catalog kit items do not have sell prices or costs; quantity on hand is not tracked. The purpose of a catalog kit item is simply to display a list of items to sell in Point of Sale. For example, list all of the common blades that tend to be sold with a popular fan. (The list or “catalog” of items is set up by using the Inventory Kit program.) During Point-of-Sale, if a catalog kit is set up as a related item, the program displays the Catalog Item Screen *from* the Related Item Screen. The Catalog Item Screen displays the quantity available and price of each item in the catalog. The salesperson enters the quantity (needed for one fixture) for any item to be sold as a related item. When finished selecting items from the catalog (which may simply be one item), press [TAB]. The cursor returns to the Related Item Screen. The original catalog kit item will be replaced with the last item that was sold from the catalog. Note: it is possible to create a catalog kit item comprised of other catalog kit items. The [F3] function key is used from the Catalog Item screen to view “catalogs within catalogs.”

Toggle Off/ On Related Item Selling. There is a new option that can be used to “turn off” automated related item selling for a particular customer order. This is controlled by the salesperson from the Point of Sale line item screen. For example, assume a salesperson wants to enter a house order without bulbs. The salesperson can temporarily “turn off” the related item option to sell fixtures without the bulbs. While on the line item screen with no items “read up,” press [F12] for the Action Menu and then press ‘L’ for “reLated items.” This will “toggle off” related item selling. Pressing [F12] and ‘L’ again turns the option back on. If you return to the heading screen, the “Selling of Related Items” reverts back to the default mode. (The default mode is defined in Inventory Options under Table Options.)