

How to Use Point of Sale Line Item Archive

Overview

The Line Item Archive program can be used to search for items sold on closed orders and for items deleted from "L" type sales orders. Items sold on closed orders are copied to the line item archive file when the daily close processes the order. Items deleted from sales orders are immediately copied to the line item archive file. Items deleted from Quotes are not copied to the archive file.

Users can view all items sold to a specific customer in item number sequence, sales order sequence, or by the customer's Purchase Order number. Also, users can look up a specific item number and view all customers who have purchased that item by using the "ITEM ONLY" sequence.

The Line Item Archive display is a useful tool when a customer returns an item and does not have the original receipt/invoice. A salesperson can search the archive file by item number to find out what a specific customer paid.

How to Use the Line Item Archive Program

To view items sold to a specific customer, you must know the Customer ID before selecting this program.

To view a specific item number and view all customers who have purchased that item, you must know the item number and vendor code before selecting this program.

- Select Point of Sale from the Main Menu.
- Select "Line Item Archive."
- The user is prompted to enter "SALESPERSON." Enter your salesperson password like you would for Main Order Entry.
- ID: Enter the Customer ID.

The top right corner of the screen will display **ITEM NUM**. By default, archived items for the selected customer will display in **Item Number sequence**. See the sample screen below.

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06/10/2013          POINT OF SALE LINE ITEM ARCHIVE          ITEM NUM
ID: BLDR          NAME: BUILDER'S INC.
ITEM NUMBER / VC / DESC      ORDER#      PO#/DATE P F X QTY      ITEM      LABOR
SELL/COST SELL/COST
RS1654BZ          227357          L Y 03 03      48.680
AAA FLMT 1-75W ETCH GL GLD BZ      04/27/2013 FX      3.00      29.500
RS1654BZ          228648          L D 05 05      66.970
AAA FLMT 1-75W ETCH GL GLD BZ      05/21/2013 FX      0.00      29.500
RS1654BZ          227319          L D 05 03      48.680
AAA FLMT 1-75W ETCH GL GLD BZ      05/25/2013 FX      3.00      29.500
RS1655BZ          224015          L Y 08 08      84.970
AAA FLMT 2-60W ETCH GL GLD BZ      02/16/2013 FX      2.00      37.500
RS1655BZ          226776          L Y 03 03      84.970
AAA FLMT 2-60W ETCH GL GLD BZ      04/16/2013 FX      1.00      37.500
RS1655BZ          228648          L D 07 07      84.970
AAA FLMT 2-60W ETCH GL GLD BZ      05/21/2013 FX      1.00      37.500
RS1655BZ          229040          L Y 19 19      84.970
AAA FLMT 2-60W ETCH GL GLD BZ      06/04/2013 FX      1.00      37.500
    
```

F3=NEXT ITEM BY F7=NEXT CUSTOMER F8=PREV CUSTOMER

How to Use Point of Sale Line Item Archive

As noted, the screen will display items that have been “archived” for the selected customer in item number sequence. Specifically, the sequence is Customer ID, Vendor Code, Item#, Date Closed.

Press Page Down to continue to the next screen-full of archived items. Press Page Up to display the previous screen.

You can “skip ahead” by typing in the Vendor Code and then the item number at the bottom of the screen.

The **TX** column displays the taxability of the item. The letter “D” in the TX column indicates the item was DELETED from the order. The salesperson ID displayed below the SS column (Selling Salesperson) reflects the salesperson who deleted the item. For Deleted items, the DATE shown is the date the deletion occurred. Three of the line items shown below have ‘D’ in the TX column and reflect deleted line items.

06/10/2013		POINT OF SALE LINE ITEM ARCHIVE				ITEM NUM			
ID: BLDR	NAME: BUILDER'S INC.								
ITEM NUMBER / VC / DESC	ORDER#	PO#/DATE	T	L	T	SS	PS	ITEM	LABOR
			P	F	X	QTY		SELL/COST	SELL/COST
RS1654BZ	227357		L	Y	03	03		48.680	
AAA FLMT 1-75W ETCH GL	GLD BZ	04/27/2013	FX			3.00		29.500	
RS1654BZ	228648		L	D	05	05		66.970	
AAA FLMT 1-75W ETCH GL	GLD BZ	05/21/2013	FX			0.00		29.500	
RS1654BZ	227319		L	D	05	03		48.680	
AAA FLMT 1-75W ETCH GL	GLD BZ	05/25/2013	FX			3.00		29.500	
RS1655BZ	224015		L	Y	08	08		84.970	
AAA FLMT 2-60W ETCH GL	GLD BZ	02/16/2013	FX			2.00		37.500	
RS1655BZ	226776		L	Y	03	03		84.970	
AAA FLMT 2-60W ETCH GL	GLD BZ	04/16/2013	FX			1.00		37.500	
RS1655BZ	228648		L	D	07	07		84.970	
AAA FLMT 2-60W ETCH GL	GLD BZ	05/21/2013	FX			1.00		37.500	
RS1655BZ	229040		L	Y	19	19		84.970	
AAA FLMT 2-60W ETCH GL	GLD BZ	06/04/2013	FX			1.00		37.500	

F3=NEXT ITEM BY F7=NEXT CUSTOMER F8=PREV CUSTOMER

The Date shown for items not deleted is the DATE CLOSED for the order.

The **F3=NEXT ITEM BY** function key changes the sequence of archived items. To view archived items in Point of Sale Order Number sequence, press F9 to clear the screen, then press F3 so that **ORDER NUM** appears in the top right corner. (You may have to press “F3=Next Item By” multiple times.) Next, enter the Customer ID. Archived items are now displayed in ORDER NUMBER sequence for the specified customer. Specifically, the sequence is Customer ID, Order#, Line#.

Page Down to continue to next screen. Page Up displays previous screen.

The cursor drops down to the bottom of the display under the ORDER# column allowing you to enter a specific order number and “skip ahead” to that order number.

How to Use Point of Sale Line Item Archive

To view archived items in Purchase Order number sequence, press F9 to clear the screen, then press F3 so that **PO NUMBER** appears in the top right corner. (You may have to press "F3=Next Item By" multiple times.) Next, enter the Customer ID. Archived items are now displayed in Purchase Order sequence for the specified customer. This is the PO Number that is optional on the POS Header screen. Specifically, the sequence is Customer ID, PO#, Order#, Line#.

Page Down to continue to next screen. Page Up displays previous screen.

The cursor drops down to the bottom of the display under the PO#/DATE column allowing you to enter a specific PO Number and "skip ahead" to orders with that PO number.

To view archived items in **ITEM ONLY** sequence for any customer, press F9 to clear the screen, then press F3 so that **ITEM ONLY** appears in the top right corner. (You may have to press "F3=Next Item By" multiple times.)

The Customer ID is left BLANK when in ITEM ONLY sequence. The cursor drops down to the bottom left of the screen allowing you to enter a VENDOR CODE and ITEM NUMBER.

Archived line items are now displayed in Vendor Code, Item#, Date Closed sequence.

Page Down to continue to next screen. Page Up displays previous screen.

To exit from POINT OF SALE LINE ITEM ARCHIVE, press F12 and Exit.

How to Use Point of Sale Line Item Archive

Salesperson Permission to View Cost on Point of Sale Line Item Archive Screen

If the **Displayable Prices in Inquiry** field in the salesperson record includes the letter “E” for cost, the Point of Sale Line Item Archive screen will display Cost. If the letter “E” for cost is not one of the “Displayable Prices in Inquiry” for a salesperson, then the Cost is left blank on the Point of Sale Line Item Archive screen.

Which Items Update the Archive File

Deleted line items from “L” type orders are ALWAYS copied to the Line Item Archive file immediately. (Line items deleted from Quotes are not copied to the Archive file.)

All other line items update the archive file after a sales order has been closed and the daily close processes the order IF the archive fields in Main Options, the customer master record and the item master record are set up to “archive.”

The “Archive” fields in Main Options, the customer master and the item master records must be set appropriately in order for Tag-n-Trak to update the Line Item Archive file.

Main Options:

From Main Menu, select System Administrator, Options Menu, Main Options. Press [F7] until you reach the 10th screen of Main Options titled “CLOSING OPTIONS - DAILY / PERIOD / YEAR – 1.”

There are two fields that affect updating the Archive File. The first field is:

DO YOU WANT TO SAVE POS LINE ITEMS TO ARCHIVE FILE A (A,Y,N)

A = Archive items sold to ALL customers regardless of whether the customer master field “Archive” is Y or N.

Y = Archive items sold to customers only if the customer master field “Archive” is “Y.”

N = Do NOT update the Line Item Archive file. If Main Options is set to N for No archiving, the only items that update the archive file are deleted line items.

The second field in main options that controls archiving is also on the 10th screen and is labeled:

ORDER TYPES TO SAVE IN POS LINE ITEM ARCHIVE FILE L

L means archive line items sold on “L” type lighting orders. Some lighting showrooms sell line items on other order types. If you sell line items on other order types (such as order type A for “Debit” Order), please contact Mylee customer support for assistance on whether or not line items sold on other order types should be archived.

Continued on Next Page

How to Use Point of Sale Line Item Archive

Customer Master:

There is a field in the customer master record labeled "Archive."

Archive = Y. If the Main Options field "Do you want to save POS Line Items to Archive File" is A or Y, items sold to this customer will update the archive file.

Archive = N. If the Main Options field "Do you want to save POS Line Items to Archive File" is A, items sold to this customer WILL update the archive file. (The Main Options "A" to archive ALL overrides what is in the customer master record.) If the Main Options field "Do you want to save POS Line Items to Archive File" is Y or N, then items sold to this customer will NOT update the archive file.

Item Master:

The Archive flag in the item master record serves a dual purpose:

1. It determines which items will be archived in the Point-of-Sale Line Item Archive file. (To view archived line items, go to the Point of Sale Menu and select "Line Item Archive.")
2. It controls the printing of job labels for specific items.

The archive flag is a field labeled "Archive" in the Inventory Item Master record.

Archive Flag	Include item in POS Line Item Archive File?	Print Job Label?
blank	YES	YES
N	NO	YES
L	YES	NO
B	NO	NO
O	YES	Print only ONE label regardless of quantity
1	NO	Print only ONE label regardless of quantity