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Point of Sale – Ship Order from Another Store Location

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**Point of Sale – Ship Order from Another Store Location****OVERVIEW**

Point of Sale provides the option to SHIP FROM another store for lighting showrooms with multiple locations. Use of this feature is optional. When this feature is used, the salesperson chooses which store to “SHIP FROM” when a sales order is opened.

This document provides an overview of the multi-store functions that provide the option for shipping merchandise out of another store. In this document:

S1 = Sample Showroom 1 location

S2 = Sample Showroom 2 location

S33 = Distribution Warehouse

- Using Table Options, you can control which store locations display in the “Select Store to Ship From” box when a sales order is opened.
- Using POS Terminal Options, you can control whether or not a list of stores to “SHIP FROM” displays when a sales order is opened. Since the feature is controlled by POS Options, you can turn it “on” for some users and leave it “off” for others.
- When the feature is turned on, a list of stores to Ship From will display as you create a new sales order just prior to displaying the line items screen. If the sell and ship store is the same for most orders, the ship store will be set to default to the selling store. Salespeople use the Up or Down Arrow keys to select a different Ship store.
- Once an order is opened, you cannot change the SHIP FROM location. If the wrong Ship store is selected, the order should be deleted and re-created.
- For existing sales orders, the “Ship Str” number is displayed on the POS header screen, the Line Items screen and the Closing/Totals screen.
- The ship store number will be stored in the POS Header file records and the POS Line Item file records and will be available for query reports.
- When you select to Ship From another store, items sold on the sales order are RESERVED in the Ship Store’s inventory file.
- When you select to Ship From another store, the backorder and special order records will be created in the Ship store location. Purchase orders created in the shipping location will “pick up” these backorders and special orders.
- If you use the Special Order create feature to create a purchase order directly from a point of sale order, you can use this feature with some restrictions when shipping from another store. The program will allow you to create a purchase order in NEW status, however, you will not be allowed to “Post & Print” or “Receive” the PO from the Point of Sale screen. As in the past, if you are selling and shipping from the same location, you are allowed to Post & Print the PO and Receive the PO from the Point of Sale screen if your salesperson record allows it.
- The Point of Sale Archive file for the selling store will display both the ship and sell store numbers.
- The Store Transfer options will continue to be available from Point of Sale and will work in conjunction with the new feature. For example, you can create a sales order in store 1 to ship out of a distribution warehouse store 33. If you need to ship one item out of store 2, you would need to use the Store Transfer function to do a store transfer.

**Point of Sale – Ship Order from Another Store Location**

- The Point of Sale program allows robbing from another sales order that has the same ship location provided the salesperson has permission to rob. For example:

The program allows for a salesperson selling out of store 2 working on an order with a ship store of 1 to rob from an order with a ship store of 1 if the salesperson has permission. However, a salesperson selling out of store 2 working on an order with a ship store of 2 cannot rob from an order with a ship store of 1.

The Salesperson screen under Accounts Receivable controls permission for the “robbing” of items from other orders.

- The Daily Close program will print the Ship Store number on the order register.
- The daily close has a database “Closing Inventory Transfer” which will track each item sold on a POS order that has a ship store different from the selling store. In the G/L Posting Tables, a GL account needs to be established for posting the inventory. The G/L distribution can be broken down by division code if required.

Example: Store 1 sells items to be shipped from store 2. The daily close will go to the store 1 posting tables to get the “transfer inventory to” general ledger chart number and then go to the store 2 posting tables to get the “transfer inventory from” general ledger chart number. Since store 1 sold the items, the inventory needs to be transferred to store 1 to offset the cost of goods sold for store 1. At the end of the daily close, the program will add up all of the postings for inventory transfers by GL chart and create GL distribution records with the same transaction number as the daily close for the inventory transfers.

The Closing Inventory Transfer file records can be purged during a Period Close based on Purge Date.

The Closing Inventory Transfer file records are available in Query.

**SETUP AND PREPARATIONS**

**Table Options Multi-Store Setup POS Column to Allow Ship from Another Store**

Please consult with Mylee Systems support personnel for assistance in setting up Table Options to Ship From another store.

Select System Administrator, Options Menu, Table Options. Next, Select **Multi-Store Setup**. **\*\*Use CAUTION when editing this table. Be careful to NOT change the “Data File Path!”**

The column **POS** controls whether or not users at the store location you’re logged into will have the capability to SHIP FROM another store location. See the example screen below:

		Multi-Store Setup Table				
		SAMPLE LIGHTING SHOWROOM #1				
STR	Name	Data File Path	D	P	S	P
			L	E	T	O
			Y	R	S	R
01	Sample Showroom 1	/usr/df/datafile/str1/	Y	Y	Y	Y
02	Sample Showroom 2	/usr/df/datafile/str2/	Y	Y	Y	N
33	Distribution Warehouse	/usr/df/datafile/str33/	Y	Y	Y	Y
						7
						2
						32

**Point of Sale – Ship Order from Another Store Location**

For EACH store location, the Table Options need to be edited.

Enter Y for Yes for each store that the store you’re currently logged into can “ship from” in Point of Sale. Enter N for No, to not allow shipping from that store. The example **ABOVE** is the Table Options for Store 1. This store has a ‘Y’ in the POS column for store 01 because it will be shipping out of its own store and a ‘Y’ in the POS column for store 33 because it will be shipping out of store 33 the distribution warehouse. There is an ‘N’ in the POS column in the example for store 2 because store 1 users are not allowed to ship out of store 2.

The example **BELOW** is Table Options for Store 2. This store has a ‘Y’ in the POS column for store 02 because it will be shipping out of its own store and a ‘Y’ in the POS column for store 33 because it will be shipping out of store 33 the distribution warehouse. There is an ‘N’ in the POS column in the example for store 1 because store 2 users are not allowed to ship out of store 1.

**Multi-Store Setup Table**  
SAMPLE LIGHTING SHOWROOM #2

STR	Name	Data File Path	D	P	S	P	P
			L	E	T	O	T
			Y	R	R	S	R
01	Sample Showroom 1	/usr/df/datafile/str1/	Y	Y	Y	N	7
02	Sample Showroom 2	/usr/df/datafile/str2/	Y	Y	Y	Y	2
33	Distribution Warehouse	/usr/df/datafile/str33/	Y	Y	Y	Y	32
---	---	---	---	---	---	---	---
---	---	---	---	---	---	---	---
---	---	---	---	---	---	---	---
---	---	---	---	---	---	---	---
---	---	---	---	---	---	---	---

The example **BELOW** is Table Options for Store 33. This store has a ‘Y’ in the POS column for store 33 because it will be shipping out of its own store, though in this scenario, POS sales orders are rare at the distribution warehouse. There is an ‘N’ for both stores 01 and 02 because Store 33 users are not allowed to ship out of those stores from Point of Sale.

**Multi-Store Setup Table**  
DISTRIBUTION WAREHOUSE STR#33

STR	Name	Data File Path	D	P	S	P	P
			L	E	T	O	T
			Y	R	R	S	R
01	Sample Showroom 1	/usr/df/datafile/str1/	Y	Y	Y	N	7
02	Sample Showroom 2	/usr/df/datafile/str2/	Y	Y	Y	N	2
33	Distribution Warehouse	/usr/df/datafile/str33/	Y	Y	Y	Y	32
---	---	---	---	---	---	---	---
---	---	---	---	---	---	---	---
---	---	---	---	---	---	---	---
---	---	---	---	---	---	---	---
---	---	---	---	---	---	---	---

**Point of Sale – Ship Order from Another Store Location**

**Table Options Multi-Store Setup-PTR Column for Printer# for BKO Fill Rept by Salesperson**

Select System Administrator, Options Menu, Table Options. Next, Select **Multi-Store Setup**. The screen shown below is a sample table options for store 33 Distribution Warehouse. The PTR column is used to specify the Printer Number for the Backorder Fill Report by Salesperson. When store 33 receives a PO and the SHIP Store for a customer backorder is store 1 Sample Showroom 1, the Backorder Fill Report by Salesperson will print on printer 7. (See column labeled **PTR**.)

		Multi-Store Setup Table				
		DISTRIBUTION WAREHOUSE STR#33				
STR	Name	Data File Path	D	P	S	P
			L	E	T	P
			Y	R	R	S
			Y	Y	N	7
			Y	Y	N	2
			Y	Y	Y	32
01	Sample Showroom 1	/usr/df/datafile/str1/	Y	Y	N	7
02	Sample Showroom 2	/usr/df/datafile/str2/	Y	Y	N	2
33	Distribution Warehouse	/usr/df/datafile/str33/	Y	Y	Y	32

For each store, go to Table Options and specify the printer number for printing the Backorder Fill Report by Salesperson for each of the store locations.

If you do not print the Backorder Fill Report by Salesperson, the fields in the PTR column may be left blank.

NOTE: Printing the Backorder Fill Report by Salesperson is controlled by a field on the 9<sup>th</sup> screen of Main Options. To view it for each store, select System Administrator, Options Menu, Main Options. Press F7 until you get to the 9<sup>th</sup> screen titled Main Options – Purchasing. Refer to the following field. If this field is blank, you are not printing the BKO Fill report by salesperson. If this field contains a number 1 through 6, it means you are printing the BKO Fill report by salesperson. The number 1-6 determines the salesperson record type for printing the report and whether or not the program does a “Top of Form” (page break) between each salesperson.

In the example below, the report is printed for the Selling salesperson (the Slip on the order heading) and there is a page break between salespersons so that each salesperson receives their own report.

PRINT BKO FILL REPORT BY SALESPERSON / TOF 4 (1/4=SELL 2/5=POST 3/6=CNTR)  
(blank=NO SALESPERSON REPORT)

**POS Options-Screen 1 Fields Allow Shipping from Another Store**

Once Table Options has been set up to allow shipping from another store, POS Options is used to control whether or not the list of stores to SHIP FROM displays in Point of Sale. Select System Administrator, Options Menu, POS Options.

Enter the TERMINAL ID for the salesperson OR salespersons using that ID.

Refer to the following two fields on screen 1 of POS terminal options:

**STOP FOR SHIP STORE BEFORE CREATING ORDER** \_ (Y,N) **DEFAULT STORE** \_\_

If Y, the POS program displays a list of stores from which the salesperson can select a ship location at the time an order is opened.

If N, the POS program does not display a list of stores. The ship location will default to the “Default Store” in POS Options. (See below.)

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### Point of Sale – Ship Order from Another Store Location

STOP FOR SHIP STORE BEFORE CREATING ORDER \_ (Y,N) **DEFAULT STORE** \_\_\_

The Default Store field is for the default ship location. It will initially default to the main store location. For example, for users in the S1 (Sample Showroom 1) database, the default store will be 1. For users in S2 (Sample Showroom 2), the default store will be 2. Normally, the Default Store should not be changed unless those using this Terminal ID ALWAYS ship from another store location.

#### Salesperson Record-Setup Control Robbing Items from Sales Orders

Select Accounts Receivable and then Salesperson. Enter the Salesperson ID. Press F7 to display the second of two screens.

Allow Robbing From Order: \_ (Y-Yes N-No P-Posting S-Selling E-Either)

The program allows robbing from another order that has the same ship location. For example, the program allows for a Showroom 1 salesperson working on an order with a ship store of 1 to rob from an order with a ship store of 1 if the salesperson has permission. The program allows for a Showroom 1 salesperson working on an order with a ship store of 33 (Distribution Warehouse) to rob from an order with a ship store of 33 if the salesperson has permission.

A salesperson working on an order with a ship store of 1 cannot rob from a ship store of 33.

- Y indicates the salesperson is allowed to rob from another order.
- N indicates the salesperson is not allowed to rob from another order.
- P indicates the salesperson is allowed to rob from another order if the Posting salesperson is the same as the current order.
- S indicates the salesperson is allowed to rob from another order if the Selling salesperson is the same as the current order.
- E indicates the salesperson is allowed to rob from another order as long as either the posting or selling salesperson is the same as the current order.

#### Closing Routine Menu-GL Posting Table Setup when Ship From another Store Location

If you use the Tag-n-Trak General Ledger module OR if you print the GL Distribution Report from the Closing Routine Menu, you will need to edit the General Ledger Posting Table as shown below.

- Go to your STORE 1. From Main Menu, select "Closing Routines" and then "GL Posting Table."
- Select #5 "Divisional Inventory Transfer Posting."

**DIVISION:** Press ENTER to leave the Division field Blank.

**INVENTORY CHART:** Enter the general ledger chart number for Inventory for this store.

NOTE: Some lighting showrooms distribute to general ledger based on Divisions. If you have general ledger distribution set up by Division, then enter each Division and the general ledger chart number for Inventory for that division **if it is different from the default Inventory Chart number you specified for the Blank Division.** In other words, assume you have 10 divisions set up under the "Divisional Summary Posting" Tables and all 10 use the same G/L Account Number for "Inventory." When this is the case, set up one record in the "Divisional Inventory Transfer Posting" screen with a "blank" division and the Inventory G/L Chart number for that store as noted above. It is not necessary to set up that same Inventory Chart number for each of the 10 divisions. If nine of the 10 divisions all post to the same G/L Inventory account entered for the default "blank" division but one division posts to a different G/L Inventory account number, then set up a record for that one division that is different in addition to setting up a record with the Inventory Chart for the "blank" default division.

Point of Sale – Ship Order from Another Store Location

If you are unsure as to whether or not you distribute to general ledger by Division, please contact Mylee Customer Support for assistance.

- Repeat the above step for EACH STORE.

Each time a daily close is run, general ledger distribution is created for all types of inventory transfer transactions. The description of the G/L distribution for transfers created by the daily close is "Inv Xfer Between Stores." The types of inventory transfers are:

- (a) Store Transfers done from the Main Inventory or Inventory Inquiry screens.
(b) Store Transfers done from a Point of Sale Order including F2=Customer Pickup, F7=Deliver to Customer and F8=Transfer to Store.

For "(a)" and "(b)" above, the G/L Distribution is created during a daily close AFTER the "Post Transfer" step has been run for the items transferred. A credit is posted to the Inventory chart number of the sending store to decrease inventory and a debit is posted to the Inventory chart number of the receiving store to increase inventory.

(c) The transfer of inventory cost when shipping from another store in POS. The G/L Distribution is created during the daily close for all orders that have a "Ship" store different from the "Sell" store. A credit is posted to the Inventory chart number of the "Ship" store to decrease inventory and a debit is posted to the Inventory chart number of the "Sell" store to increase inventory. As part of the normal G/L distribution for a sale, the selling store's inventory chart also will be credited and COGS debited.

POINT OF SALE – CREATING SALES ORDERS WITH A DIFFERENT SHIP STORE

Point of Sale-Select SHIP FROM Store Location

The example below demonstrates selling from store 1 (Sample Showroom 1) using a Ship Location of store 33 (Distribution Warehouse) for a house job.

In this example, the POS terminal options for the salesperson are set as follows:

STOP FOR SHIP STORE BEFORE CREATING ORDER Y (Y,N) DEFAULT STORE 1

After filling out the header screen as normal, the following box displays after pressing Enter past the order type L:

Table with 2 columns: STR, Name. Rows: 1 Sample Showroom 1, 2 Sample Showroom 2, 33 Distribution Warehouse.

Arrow down to STR 33 to highlight it and press ENTER.

**Point of Sale – Ship Order from Another Store Location**

The “**Ship Str: 33**” displays in the upper right section of the POS Line Items screen.

```
MM/DD/YYYY          POINT OF SALE          MAN
Order: 10100        Cust: BLDR      Name: BUILDER'S INC.      Ship Str: 33
Column: C +/-      0.000% Special: B  Ship: PICKUP      Slp: DW      Lines: 0
Tax: Y 10          8.0000% CR: 50000  Status: O  MM/DD/YYYY      Type: L
```

```
Ln# Item Number          VC   Ordrd  Dlvrd  Bkord  TFL  Sell Price      Total
```

Once the order is opened and the salesperson is on the line items screen, the Ship Str location may NOT be changed.

**Point of Sale- Quantities Reserved & Backordered at the SHIP Store Location**

In our sample order, as line items are entered, the inventory of store 33 is accessed. F3 inquiries initially display the ship location of store 33, the Distribution Warehouse.

Items sold on this order reserve inventory quantities at store 33 Distribution Warehouse. Items backordered on this order update the customer backorder file at store 33 Distribution Warehouse. A purchase order created in store 33 Distribution Warehouse will pick up these customer backorders.

All line items on the order are for the same ship location. The salesperson cannot ship from multiple stores on the same order. The salesperson may select store transfers if their permissions allow it. In this example, the Sample Showroom 1 salesperson may request a transfer from Sample Showroom 2 to fill the order being shipped out of Distribution Warehouse Store #33.

**Point of Sale-Item Master Lookup Displays QAV for the SHIP STORE Location**

An item master lookup from the POS line item order entry screen will display the QAV of the Ship location. In this example, the lookup was done from the order in store 1 with a ship store of 33. The QAV is for store 33, the Distribution Warehouse.

ITEM MASTER LOOKUP		NUMERIC BY VC <F7>	
ITEM / UPC NUMBER	VC DESCRIPTION	QAV	PRICE SD
100ACL	BLB 100W MB A19 CLEAR 120V	600	0.00
100AFR	BLB 100W MB A19 FROST 120V	1250	0.00
40ACL	BLB 40W MB A19 CLEAR 120V	800	0.00
40AFR	BLB 40W MB A19 FROST 120V	500	0.00
60ACL	BLB 60W MB A19 CLEAR 120V	900	0.00
60AFR	BLB 60W MB A19 FROST 120V	700	0.00
	KIC KICHLER		
2019NI	KIC 4LT CHANDELIER	2	93.00 S
2051AP	KIC 3LT CHANDELIER	1	187.50 S
2640NI	KIC 1LT PENDANT	4	217.50 S
	LBR LABOR / INSTALLATION		
LABOR	LBR LABOR / INSTALLATION	0	0.00 F
	NUL NULCO		
175202	NUL 2LT SCONCE	2	226.80 S
5986-10	NUL 6LT CHANDELIER	1	567.00 S

F8=Alternate



**Point of Sale – Ship Order from Another Store Location**

As previously noted, as items are sold, the quantity is reserved at the ship location store 33. Items backordered or special ordered post to the CBO quantity of ship store 33.

```
MM/DD/YYYY          POINT OF SALE          MAN
Order: 10100        Cust: BLDR      Name: BUILDER'S INC.      Ship Str: 33
Column: C +/-      0.000% Special: B Ship: PICKUP      Slp: DW      Lines: 5
Tax: Y 10          8.0000% CR: 49738 Status: O MM/DD/YYYY      Type: L
```

Ln#	Item Number	VC	Ordrd	Dlvrd	Bkord	TFL	Sell Price	Total
2	** BREAKFAST ROOM							
1	2019NI	KIC	1			Y	93.000	93.00
3	03987	WES	4			Y	0.770	3.08
5	** DEN							
4	P2503-33	PRO	1			1 YS	165.480	165.48

In the above example, a qty of 1 for 2019NI and a qty of 4 for 03987 were reserved in the Distribution Warehouse inventory. A qty of 1 for P2503-33 was special ordered (backordered) in the Distribution Warehouse inventory.

**Point of Sale-Customer Backorders Picked up by Purchase Orders Created in Ship Store**

A Purchase Order created in the Distribution Warehouse will pick up the CBO on the Sample Showroom 1 sales order:

```
MM/DD/YYYY          CREATE / EDIT LINE ITEMS
PO Number: 33000      Status: NEW Order Date: MM/DD/YYYY
Vendor ID: PRO        Name: PROGRESS
Free Freight: 0
Totals: Lines: 1 Units: 1 Cost: 78.80 Weight: 0.00

Line#  Item Number      VC  Qty  F      Cost  Line Total
  10  P2503-33      PRO   1  S      78.800  78.80  NOTE
```

```
PO ITEM NOTES      PRO P2503-33
                   AirPro Performance-CeilingFan-
SEQ  PRTF  Information
  10  R    1  BUILDER'S INC. 10100
  20  _____
```

The On Order qty of the item in store 33 Distribution Warehouse location is updated when the PO is posted.

**Point of Sale – Ship Order from Another Store Location**

Salespeople may perform the F12 and B from the order header to find out if the customer backorders/special orders have been ordered. See the screen display below:

MM/DD/YYYY	POINT OF SALE	ORDER #
Order: 10100	Cust: BLDR	Column: C +/- 0.000% Spec: B Prompt: A
Name: BUILDER'S INC.	Tax: Y 10 8.0000%	Age: 1
Address:	Terms: A NET 10TH	Slp: DW
		PSlp: DW
Ci		nes: 5
Zi		Str: 33
Co	-----	
Cr	BACKORDER STATUS FOR ORDER	
		Type: L
	LN# VC ITEM	QTY PO#/PRIM STS DATE
	4 PRO P2503-33	1 33000 ORD MM/DD/YYYY
Na	AirPro Performance-CeilingFan-	0
Ad		

When the PO is received, the Post Received Order Report and the Backorder Fill Report will print on the printer selected by the store 33 Distribution Warehouse user. However, the Backorder Fill Report by Salesperson will print on a printer designated in Table Options.

**DAILY CLOSE – PROCESSING SALES ORDERS WITH A DIFFERENT SHIP STORE**

**Daily Close–Ship Store Number on Order Register**

The Daily Close program will print the Ship Store number on the order register.

On the Order Register, see the column labeled:

**STR/STAT** (STR=Ship Store STAT=Status of Order)

Example: On the Daily Close report for store 1, when a closed sales order is processed with a Ship From store of 33, the order register column will contain:

**33/CLOSE** (33 is the Ship Store and the status of the order is Closed)

**Daily Close–Closing Inventory Transfer File Contains Records for Items Sold from Another Store**

The daily close has a database “Closing Inventory Transfer” which will track each item sold on a POS order that has a ship store different from the selling store. These records have an “H” in the Type field to distinguish them from other types of inventory transfers. Note #1: In the Closing Inventory Transfer file, records can be purged during a Period Close based on Purge Date. Note #2: The Closing Inventory Transfer file records are available in Query.

As noted previously, in the G/L Posting Tables, a GL account needs to be established for posting the inventory. The G/L distribution can be broken down by division code if required.

Example: Store 1 sells items to be shipped from store 2. The daily close will go to the store 1 posting tables to get the “transfer inventory to” general ledger chart number and then go to the store 2 posting tables to get the “transfer inventory from” general ledger chart number. Since store 1 sold the items, the inventory needs to be transferred to store 1 to offset the cost of goods sold for store 1. At the end of the daily close, the program will add up all of the postings for inventory transfers by GL chart and create GL distribution records with the same transaction number as the daily close for the inventory transfers. The Description printed on the G/L Distribution Report is “**Inv Xfer Between Stores.**”