

Basic Point of Sale

Point of Sale, now referred to as POS, is the Eagle application which is used to sell and return items.

This document serves as a general introduction to the basic and most used functions.

General Information About The Training Document

- two ways to access all functions; click icon with mouse or use designated hotkey
- to see an icon's hotkey: place cursor over icon, do not click, wait 1 – 2 seconds
- instructions on this document will use both the icon name and the designated hotkey
- **EX:** Click **Total (KPad +)** = click the **Total** icon with mouse or press the **+** symbol on the **KPad**
- **KPad** refers to the number and math symbol keys on the right side of the keyboard
- instruction to press the **–** or the **+** on the **KPad**, means you must use the **KPad** & not the other **–** or **+**
- words in **bold** lettering refer to either keys on the keyboard or **Fields** in POS

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Eagle Browser by Epicor

Eagle Browser is a software product made by Epicor. The Eagle Browser platform is the software we use to help manage all the products and services we offer (referred to as, “Eagle” from now on). Everything we do requires the use of one or more of the various Eagle applications. Your job will require you to learn different parts of Eagle. The information contained in this section serves as a general introduction to Eagle and how to find the various applications you will need.

The ‘House’



To Open, Double Click the Icon

***All Work in Every Eagle Application Must Be Done in Capital Letters
Pressing the “Caps Lock” Key After Opening the ‘House’ Should Be Part of Your Routine***

Sign On

The image shows a "Sign On" dialog box. It has a title bar that says "Sign On". Inside the dialog box, there are two input fields: "Name" and "Password". To the right of the "Name" field is an "OK" button. To the right of the "Password" field are two buttons: "Change Password" and "Cancel".

Some Terminals May Not Require a **Sign On**

If This Box Does Not Appear, Proceed to Next Screen Directly Below

Name = Your Assigned Epicor ID

Password = Your Assigned Epicor Password

You Will be Given a Unique ID & Password (Some Positions Do Not Require Password)

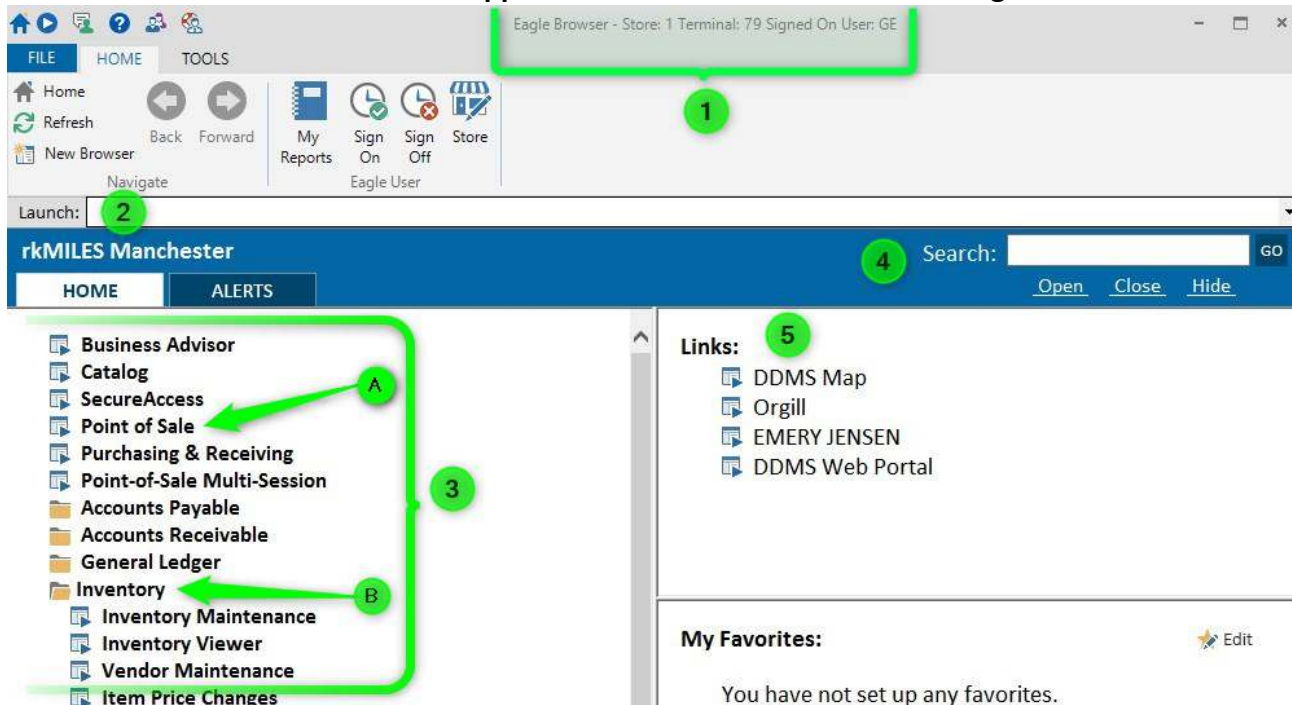
If You Were Not Given a Password, Leave Blank & Select “OK”

Only Use Your Assigned Epicor ID & Password Unless Manager Instructs Otherwise

***If You Do Not Have the Access You Need to Perform Your Assigned Tasks, Contact the IT
Department to Get the Access You Require***

Main Page

All Applications Are Launched from This Page



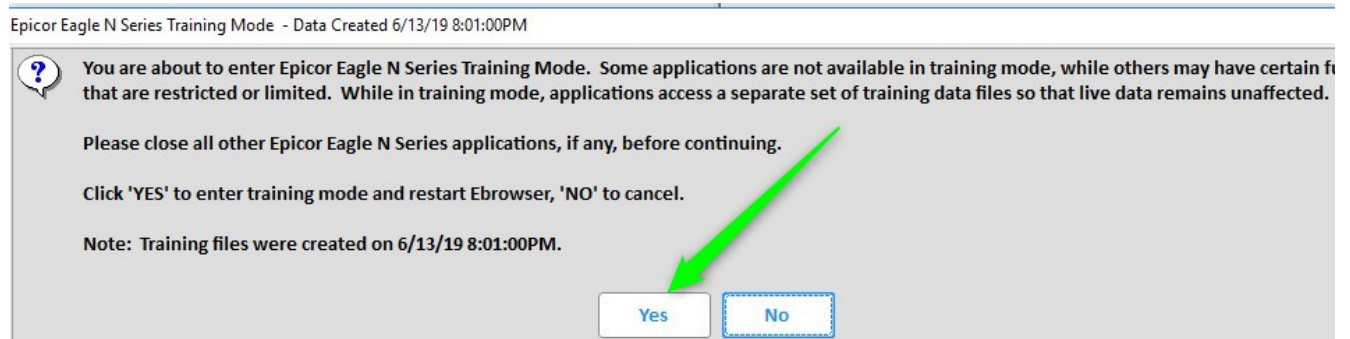
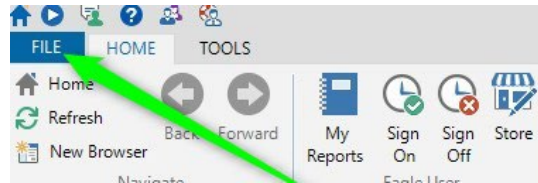
1. **Information at The Top of The Screen:** Every screen, regardless of application, will have some basic information at the top. Will usually consist of 3 to 5 facts including; Application, Screen Within the Application, Store, Terminal Number & the User who is Signed In, see specific examples below
 - a. **Eagle Browser:** This is the application; in this case it identifies this is the Eagle main page
 - b. **Store:** Identifies which location Eagle is 'locked into' & should always be your store
 - i. Eagle should always open with your location ID & should never be changed
 - c. **Terminal:** The unique # assigned to the terminal that may be needed sometime
 - i. **EX:** You contact IT for assistance, IT may need to know the **Terminal #**
 - d. **Signed On User:** The user who logged on

Three Ways to Open an Application, # 2 - 4

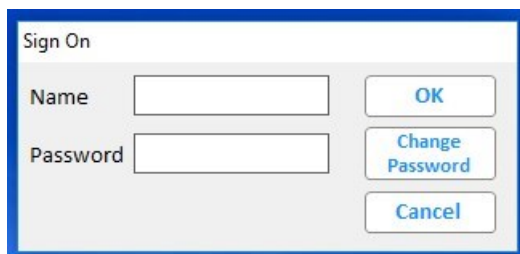
2. **Launch:** Type the abbreviation of the application you want to launch, and press "Enter"
 - a. Every application has an abbreviation and can be found by placing the cursor over the name of the application until the abbreviation appears, EX: Point of Sale = POS, so typing POS in the **Launch** box will open Point of Sale when you press "Enter"
3. **Menu Tree:** The complete list of applications
 - a. Anything with a blue square & arrow to the left is an application, click with mouse to open
 - b. A yellow folder is a group of similar applications, click with mouse to find desired application
4. **Search:** To find an application, type the keyword(s) in this box, Press "Enter" or select "Go" with the mouse, and a list of applications will appear. If a list does not appear, try using a different keyword(s)
5. **Links:** A place to save links to frequently used software programs that are not made by Epicor
 - a. Clicking on "**Orgill**" will automatically open Orgill's home page, see manager or IT department to have correct links loaded onto your **Terminal**

Eagle Browser into Training Mode

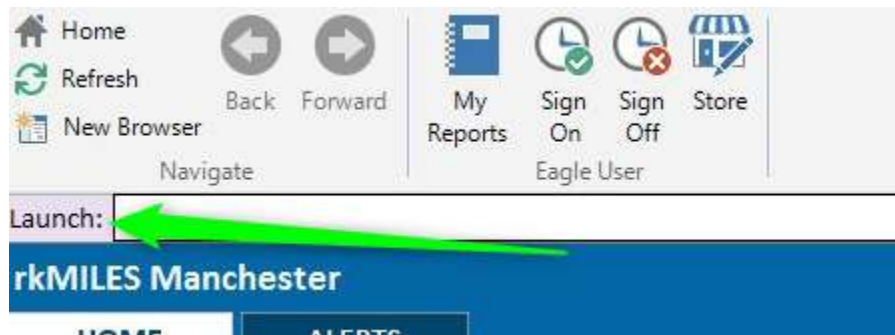
All Eagle Browser Applications Must be Closed Prior to Switching into Training Mode



EB will automatically close, then automatically re-open



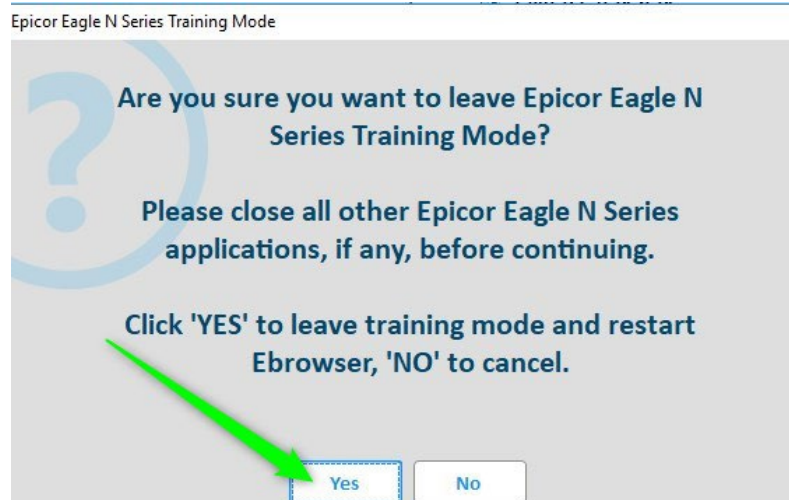
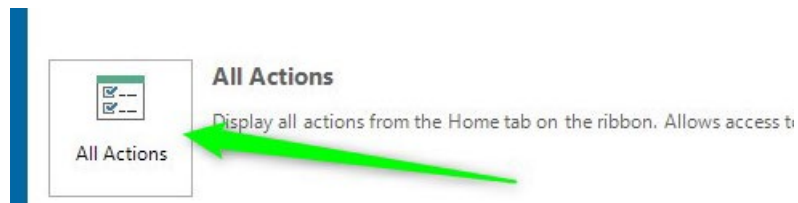
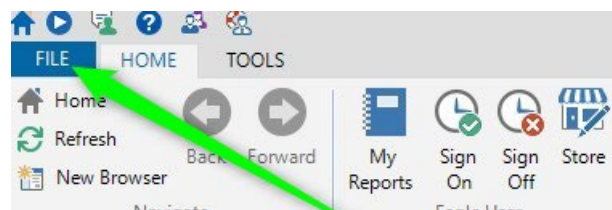
Some Workstations May Not Require You to Sign On



Pink Background = You Are in Training Mode

Once Finished in Training Mode, Follow Steps Below to Get Back to the Live System

All Eagle Browser Applications Must be Closed Prior to Switching back to the Live System



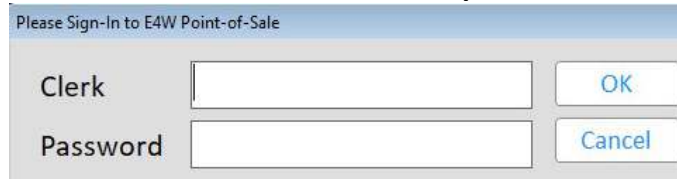
EB will automatically close, then automatically re-open

The 4 Main Screens in POS

Clerk Sign On Screen

Every Transaction Must Begin With You Signing On By Using Your Assigned Epicor ID

All Work Must Be Done In Capital Letters



Please Sign-In to E4W Point-of-Sale

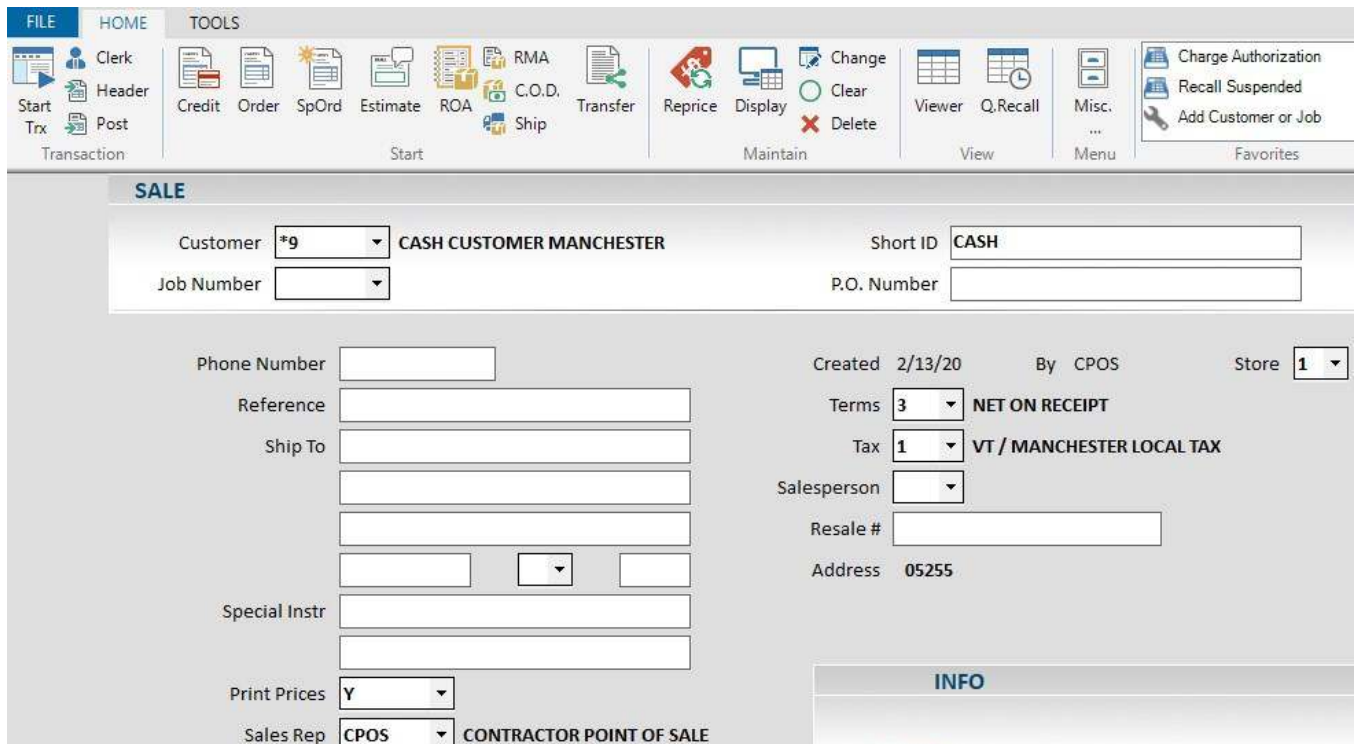
Clerk

Password

- when you complete a transaction, POS automatically returns to this screen

Header Screen

Also Known as **Customer Screen**



FILE HOME TOOLS

Transaction: Start Trx, Header, Post
Start: Credit, Order, SpOrd, Estimate, ROA, C.O.D., Ship
Maintain: Reprice, Display, Change, Clear, Delete
View: Viewer, Q.Recall
Menu: Misc. ...
Favorites: Charge Authorization, Recall Suspended, Add Customer or Job

SALE

Customer: *9 CASH CUSTOMER MANCHESTER Short ID: CASH
Job Number: P.O. Number:

Phone Number: Reference: Ship To: Created: 2/13/20 By: CPOS Store: 1
Terms: 3 NET ON RECEIPT
Tax: 1 VT / MANCHESTER LOCAL TAX
Salesperson: Resale #: Address: 05255

Special Instr: Print Prices: Y Sales Rep: CPOS CONTRACTOR POINT OF SALE

INFO

- POS opens to this screen after signing in
- this is where you select the correct customer before proceeding to the **Posting Screen**
 - will always default to a **Sale** transaction, with your location's default Cash Customer
 - if the person does not have an account, leave as is
 - if the person does have an account, type their account number in the **Customer** field
 - to find an account #, begin typing the person's name, business name, etc. and a drop down list will appear
 - if the person has multiple jobs on their account, type the correct number in the **Job** field
 - some people may give you a P.O. # or a reference, if so, type it in the **P.O. Number** field
- once all the customer information has been entered, Click **Post (F11)** to proceed to the **Posting Screen**
- to return to the **Clerk Sign On Screen**, Click **Clerk (Shift F3)**

Posting Screen

This Is Where You Begin 'Ringin' Up' The Customer

Transaction Type

Customer: *9 CASH CUSTOMER MANCHESTER P.O.:

Job Number:

Sales Rep:

Ln#	Sku	Description	Qty	U/M	Price	Ext
Posted Item Area						

Item: Quantity: Price:

Description: **Item Posting Area** Cost:

- the cursor defaults to the **Item** field
- to return to the **Header Screen**, Click **Customer (F11)**
- to return to the **Clerk Sign On Screen**, Click **Clerk (Shift F3)** or just press **Esc**
- once all the items have been posted, Click **Total (KPad +)** to proceed to the **Totals Screen**

Totals Screen

Point-of-Sale Total - Sale - Store: 1 Terminal: 79 Signed On User: CPOS

FILE HOME TOOLS

Transaction: Total Post Void Trx Suspend Alt. Tend. Tender: Disc Save Clear Misc. Menu: Charge Authorization Dynamic Promotions Require Signature Cash Customer Info E-Mail Transaction Accept Deposit Favorites

TOTAL DUE

\$1.07

Cash: Number: ABA:

Check: Number:

Bankcard: Number:

*9 CASH CUSTOMER MANCHESTER			
Subtotal	1.00	Sales Tax	.07
Total	1.07		

- to return to the **Posting Screen**, Click **Post (Shift F2)** or just press **Esc**

The 5 Menus in POS

POS Has 5 Menus Which Contain Important Functions
The Hotkey For Each Command Is In Blue

Header Menu

Header Menu	
MAINTAIN 8 Add/Change Customer or Job V View/Change Customer Codes MISCELLANEOUS E eStore Information	TRANSACTION (Continued) I Batch Invoicing J Source Order from Transfer T Multiple Ship To X Recover 'In Process' Transactions VIEWERS 5 Documents A Customer Returns Q Deposit Activity
TRANSACTION 1 Recall Last Saved Document 2 Reprint , View or Fax Invoice 3 Enter Charge Authorization 4 Enter Document Reference 6 Enter Document Notes or Delivery Instructions 7 Recall Suspended Transaction 9 Create Transfer Adjustment H Enter Loyalty #/View Loyalty Summary	

- from **Header Screen**, Click **Misc. (KPad -)**

No Sale Menu

Can Only Be Accessed Under Your Location's Default Cash Customer Account

No Sale Menu	
ACTIVITY 1 Open Cash Drawer D Display Cash Drawer K Print Totals and Close Cash Drawer MISCELLANEOUS 3 Test Form Alignment 5 Open/Close Customer Display 7 Enter Training G Print Gift Receipt I Import Third Party Transaction File P Paste Document	TRANSACTION (Continued) 9 Enter Paid In A Recall Suspended Transactions F Gift Card Maintenance H Enter Loyalty #/View Loyalty Summary N Return With Receipt/Credit Card R Reverse Transaction X Recover 'In Process' Transactions VIEWERS J Electronic Journal V Archived Documents
TRANSACTION 2 Reprint , View or Fax Invoice 4 Cash a Check 6 Create Raincheck 8 Enter Paid Out	

- from **Posting Screen** with nothing in the **Item Posting Area** or the **Posted Item Area**, Click **Misc. (KPad -)**
- contains functions that are not associated with any type of sale or return transaction

Posting Menu (SKU Entered)

Posting Menu (SKU Entered)	
DISPLAY 2 Tally 2 Components 3 Item Costs 7 5 Prior Selling Prices J Source Item Menu S All Occurrences of SKU X Alternates	MAINTAIN (Continued) U Price at 'N for \$X', Example 3 for \$1 TRANSACTION N Validate Return Items VIEWERS O Open Orders P Purchase Orders Q Item Purchase History
MAINTAIN 1 Change Line Item Tax 4 Sell Item at No Charge 5 Change Location 6 Enter Additional Information 8 Change Price/Cost for all Occurrences of SKU F Change Bill of Materials K Record Lost Sale R Sell Raincheck Item T Code Non-taxable Item as Taxable	

- from **Posting Screen**, with a **SKU** in the **Item** field in the **Item Posting Area**, Click **Misc. (KPad -)**
- functions on this menu look at the **SKU** in the **Item** field

Posting Menu

Posting Menu	
DISPLAY 4 Total Weight 5 Lumber Totals 9 Tally 2's Without Components Posted A Dynamic Promotions Pricing B Backorder Subtotal E Find Items Without Serial # Assignment S All Occurrences of SKU	TRANSACTION 3 Partially Invoice Order 6 Enter Customer Information H Enter Loyalty #/View Loyalty Summary N Return With Receipt/Credit Card VIEWERS O Open Orders P Purchase Orders Q Item Purchase History V Archived Documents
MAINTAIN 1 Go to Line 2 Insert a Line 7 Insert Group Subtotal 8 Calculate and Show Range Subtotal F Change Bill of Materials	
MISCELLANEOUS I Import Third Party Transaction File J Change Add'l Info on Selected Items	

- from **Posting Screen** with at least 1 item in **Posted Item Area** & **Item Posting Area** empty, Click **Misc. (KPad -)**
- functions on this menu look at the entire transaction

Totals Menu

Totals Menu	
DISPLAY A Dynamic Promotions Pricing	TRANSACTION (Continued) 5 Change Print Sequence 6 Enter Customer Information 7 Change Date or Invoice Number 8 Select Credit Card 9 Append Special Order Items to PO F Post Freight J Require Signature M Ship Via X Accept Deposit Y Allow manual card entry on PIN pad
MISCELLANEOUS 1 Fax This Document B e-Mail This Document E Exchange Foreign Currency G Print Labels H View Loyalty Summary P Allow swipe of chip card R Enter Dated Billing W iNet Credit Authorization	
TRANSACTION 2 Change Tax 3 Enter Charge Authorization 4 Enter Document Reference	

- from **Totals Screen**, Click **Misc. (KPad -)**

The 4 Viewers in POS

POS Has 4 Viewers Which Organize Specific Groups of Information

Document Viewer

Contains Open Documents: Estimates, Orders, Special Orders & Transfers

Drill F3 Select F4 Display F6 Print Trx F7 Delete F10 Misc. ... KPad -- Refresh KPad + Export KPad * Print Ctrl+P Help F1

Orders

Customer Type ALL

Job SKU

Short ID Thru Date 02/16/20

Store 1 Special Order P.O.

[Change Log](#)

Date	St	Doc #	Type	Cust #	Job	Customer Name	Short ID	SKU	Deposit	Total	Exp Divry
2/16/20	1	157252	Transfer	123		TXFR MANCHE	TRANSFER		0.00	77.70	2/18/20
2/15/20	1	156828	Order	*9		AIMEE BRAXME	6102975995		284.99	284.99	2/19/20
2/15/20	1	157109	Sp.Order	*9		ASHLEY LEWIS	LEWIS		1,612.90	1,612.90	12/25/20
2/15/20	1	156966	Estimate	*9		CASH CUSTOM	CASH		0.00	471.80	3/16/20

- from **Header Screen**, Click **Misc. (KPad -)**, Click **5 Documents, (KPad 5)**

- the **Customer, Job, Short ID, Store, Type, SKU** and **Thru Date** fields can all be used as filters to narrow down your search

Customer Returns Viewer

Viewer - Customer Returns

File Action Help

Drill F3 Select F4 Display F6 Misc. ... KPad -- Refresh KPad + Export KPad * Print Ctrl+P Help F1

Customer Returns [change lookup](#)

Customer Store 1 rkMILES Manchester

Job Return Date

SKU Thru 02/21/20

Clerk

Date	Time	St	Doc #	Cust #	Job	Customer Name	Short ID/ Phone #	SKU	Description
2/21/20	10:17 AM	1	B60850	20299		CROCKETT AND CO	CROCKETT	14WB	1/4" 3X5 DUROCK
2/21/20	9:59 AM	1	B60829	20413		JOSH BURLINGAME	BURLINGA	2TFG	2' SL TEE FG 8323
2/21/20	9:59 AM	1	B60829	20413		JOSH BURLINGAME	BURLINGA	6WRG	6" X 75" GRACE V

- from **Header Screen**, Click **Misc. (KPad -)**, Click **Customer Returns (A)**

- the **Customer, Job, SKU, Store, Return Date, Thru** and **Clerk** fields can all be used as filters to narrow down your search

Quick Recall Viewer

Contains Archived Documents: Invoices & Credits

File		Action		Help	
Drill F3	Select F4	Display F6	Misc. ... KPad --	Refresh KPad +	Export KPad *
		Print Ctrl+P	Help F1		

Quick Recall [change lookup](#)

Customer Short ID

Job Thru Date

SKU Details?

Store All Stores

Date	Time	St	Doc #	Type	Cust #	Job	Customer Name	Short ID	SKU
2/15/20	4:02 PM	1	708922	Invoice	23481		Johannes Michel	MICHElse J	
2/15/20	4:01 PM	1	B57242	Invoice	*9		KLEIN/JAMES H	CASH	
2/15/20	4:01 PM	1	B57243	Invoice	*9		BELL/MYRNA	CASH	
2/15/20	4:00 PM	1	B57241	Invoice	*9		SMALL/DEBOR	CASH	

- from both **Header & Posting Screens**, Click **Q. Recall (Ctrl R)**

- the **Customer, Job, SKU, Store, Short ID**, and **Thru Date** fields can all be used as filters to narrow down your search

Inventory Viewer

Contains Useful Information About All Items & Services We Offer

File		Action		Help	
Drill F3	Select F4	Display F6	View Sum F7	Weblink Ctrl+W	Misc. ... KPad --
		Refresh KPad +	Export KPad *	Labels Ctrl+B	Print Ctrl+P
		Help F1			

Inventory [change lookup](#)

Description

Store rkMILES Manchester

St	SKU	Description	Loc	Dept	Class #	Qty Available	Qty Comited	QOH	QOO	Future QOO	Primary Vendor
<input type="checkbox"/>	1 0191353	3/4" X 300" TRANSPARENT TAPE	7B	9	900	11		11			11000
<input type="checkbox"/>	1 0260729	6"X21" SAFETY GRIT TAPE STRIP	19B	6	691	5		5			11000
<input type="checkbox"/>	1 0318576	3M DOUBLE SIDED TAPE 1/2" X 250"	7B	9	900	7		7			11000
<input type="checkbox"/>	1 0340141	3M EXTERIOR TAPE 1 1/2" X 45 YD	P2EC	16	126	17		17			11000
<input type="checkbox"/>	1 0340158	3M EXTERIOR TAPE 2" X 45 YD	PD4B	16	126	7		7			11000
<input type="checkbox"/>	1 0424010	3M MOUNTING TAPE 4" X 50"	P2EC	16	126	16		16			11000

- from **Posting Screen**, Click **Viewer (F9)** or type in **Description** in **Item Posting Area** on **Posting Screen**, press **Enter**

Sale Transaction: First Three Steps

1. Clerk Sign On Screen

- a. use your assigned Epicor ID
- b. Click **OK (Enter)**

2. Header / Customer Screen

- a. defaults to a **Sale** transaction, with the cursor in the **Customer Field**
- b. **Customer** – if person has account, enter # here; if person does not have account, leave as is
- c. to find account #, begin typing the person's name, business name, ETC. & a drop down list will appear
- d. once you have found the correct account # and it is highlighted in blue, press **Enter**
- e. **Job Number** – if the customer has job accounting, enter correct job #
- f. **P.O. Number** – if the customer gives you a P.O. # or reference, enter it here
- g. once all the needed information has been entered on the **Header / Customer Screen**
- h. Click **Post (F11)** to proceed to the **Posting Screen**

3. Posting Screen

- a. cursor defaults to **Item** in the **Item Posting Area**
- b. type the **SKU** or scan the UPC barcode
- c. if you typed the **SKU**, then **Tab** over to the **Quantity** and enter correct amount, press **Enter**
- d. if you scanned the UPC, the **Quantity** fills in for you
- e. if you need additional information about the **SKU**, Click **Display (KPad /)**
- f. continue scanning UPC's or manually entering the **SKU** until all items are in the **Posted Item Area**
- g. Click **Total (KPad+)** to proceed to the **Totals Screen**

Finalizing a Sale For Customer Without a Charge Account

The screenshot shows a POS system interface. At the top, there are buttons for Transaction, Tender, Menu, and Favorites. The main display area shows 'TOTAL DUE' in a blue box, followed by '\$2.85' in large green text. Below this, there are input fields for Cash, Check, and Bankcard. The bottom section shows a summary of the sale: *9 CASH CUSTOMER MANCHESTER, Subtotal 2.66, Sales Tax .19, Total 2.85.

Cursor Defaults to The **Cash Field**

Cash Sale

- enter the amount of cash in **Cash Field**, press **Enter**
- POS always assumes two decimal places, even if you don't type a decimal: 5.00 & 500 both mean 5 dollars
- if the amount is less than the **Total Due**, cash drawer will not open & a note will appear at the bottom of the screen, telling you an additional amount is due
- if the **Cash** amount is more than the **Total Due**, the **Change Due** screen will appear, and the cash drawer will open

Check Sale

- **Tab** (remember, cursor defaults to the **Cash Field**, so you must **Tab** down to the **Check Field**)
- **Enter**, POS assumes check will = **Total Due**, so pressing **Enter** brings in the **Total Due** amount
- cursor moves to the **Number Field**, enter the check number, press **Enter**

Bank & Gift Card Sale

- cards without an **EMV** chip can be swiped, prompts vary based on type of card
- **EMV** cards must be inserted; if swiped, the pin pad will beep & "Insert Card" message will appear on pad
- some **EMV** cards will request a Pin #, customer may be able to bypass Pin request by pressing **Enter**
- most **EMV** will not require a signature from the customer, if signature prompt appears have them sign
- **EMV** cards have special security features built into them, & require us to follow strict processing rules
 - insert **EMV** card, if there is an error, the pad will prompt customer to insert card again
 - if there is a second error, pad will prompt customer to insert card a third time
 - if there is a third error, pad will prompt customer to swipe
 - this, "insert 3 times, then swipe policy" is mandated by the banking industry & must be followed

Finalizing a Sale For Customer With a Charge Account and Terms Discount

First Prompt

Immediate Terms Discount

A Will any part of this transaction be charged to the customer's account?

B

TOTAL DUE

\$1.07

Cash

Check Number ABA

Bankcard Number

Charge

C

TOTAL DUE

\$1.05

Cash

Check Number ABA

Bankcard Number

- If you select **Yes**, **Picture B**
 - **Enter**, since you selected **Yes** (pic A) **Total Due** will automatically populate in **Charge**
 - the signature prompt will appear on your screen & the Pin Pad
 - the customer's signature will then appear in the signature prompt on your screen, press **Enter**
- If you select **No**, **Picture C**
 - since you selected **No**, the **Charge** field is no longer an option
 - follow steps from, Finalizing a Sale For Customer With Out a Charge Account, to complete the transaction

Finalizing a Sale For Customer With a Charge Account and No Terms Discount

TOTAL DUE

\$1.07

Cash

Check Number ABA

Bankcard Number

Charge

- only prompt you will see when at **Totals Screen** when the customer does not have terms discount
- **When Customer Wants to Put Items on an Account**
 - press **Enter** & **Total Due** will automatically populate in **Charge**
- **When Customer Does Not Want to Put Items on an Account (Wants to Pay On the Spot)**
 - follow steps from, Finalizing a Sale For Customer With Out a Charge Account, to complete the transaction

Specialty SKUs

ZZ SKUs

- single-use SKUs, for Special Order items only, attached to a specific POS document
- are not to be re-used or sold to any other customers
- the format of the number contains a lot of very useful information **ZZ 001 979291 001**
 - ZZ** – notates it is a Special-Order item
 - 001** – store Id # from the POS Document where the ZZ SKU was
 - 1979291** – the POS document # the SKU was created on, see Step 6 (pg. 4)
 - 001** – line within the POS document the ZZ SKU is on
- more detail about these SKUs and the Special-Order process is provided in other training documents

MH SKU

- stocking information (Quantity on Hand, Quantity on Order, ETC.) & price are not kept
- type **MH** in the **Item** field, press **Tab**, at **Quantity** type the quantity being sold, press **Tab**, at **Price**, type the per unit amount, press **Enter**
- used mostly for loose items sold individually; Hillman items
- speak with your management team to learn which items are sold using the **MH** SKU
- when using the MH SKU as part of a delivery ticket, be sure to enter some info about the item in the **Description** field so the correct item is picked. Ex: ¼" x 5" Gal Carriage Bolt

Multiple Selling Units SKUs

- items that are sold individually or by the case and have the same UPC on both
 - scan the item or type the **SKU** in the **Item** field and the **Select Multiple Selling Unit** prompt will display
 - use the arrow keys to highlight the correct selling unit, Click **OK (Enter)**
- Example: SKU = **GF01**, "Pur Fill Gun Foam" sold individually and as a case of 12; since the manufacturer has the same UPC on both the can and the case, when you scan either UPC you will have to select which unit

Paint Care Recovery Fee SKUs

- there are 3 Paint Care Recovery Fee SKUs which automatically **Post** with certain paint SKUS
- **PR1 "PAINTCARE RECOVERY FEE PINT/QT"**
- **PR4 "PAINTCARE RECOVERY FEE GALLON"**
- **PR5 "PAINTCARE RECOVERY FEE 5 GALLON"**
- you do not need to do anything; the Paint Care Recovery Fee SKUs are attached to the necessary paint SKUs and will always **Post** automatically with the correct **Price**

Tally 1 SKUs

- items that sell in different lengths; Siding, Flooring, Finish Boards, Decking & Mouldings
- type the SKU in the **Item** field, press **Enter**
- the **Tally 1 Item** prompt should display. If prompt does not appear, enter any number into the **Quantity** field and press **Enter**. The Prompt will now appear.
- at **Quantity**, in the **Tally 1 Item** prompt, type the quantity of the pieces, press **Tab**
- at **Length**, in the **Tally 1 Item** prompt, type the length of the pieces, press **Enter**
- continue until all lengths and quantities have been entered
- press **Enter** with both **Quantity** and **Length** empty to **Post** the **SKU** with all **Lengths** and **Quantities**
- EX: SKU 546CSP: 6 pieces @ 10', 4 pieces @ 12' & 8 pieces @ 14'
 - type **546CSP** in the **Item** field, press **Enter**, the **Tally 1 Item** prompt will display with cursor in **Quantity**
 - **6, Tab, 10, Enter: 6/10** appears next to **Pairs** at the bottom
 - **4, Tab, 12, Enter: 6/10 4/12** appears next to **Pairs** at the bottom
 - **8, Tab, 14, Enter: 6/10 4/12 8/14** appears next to **Pairs** at the bottom
 - **Enter**, and the item will move to the **Posted Item Area**
- if the customer does not specify specific lengths of material but rather the overall lineal footage needed for their project, at **Quantity** in the **Tally 1 Item** Prompt enter total lineal footage, at **Length** in the **Tally 1 Item** prompt enter "1". This will now post the total lineal footage to the posting screen without the need to tally specific lengths.

Tally S SKUs

- items that have a Serial Number: Power Tools
- when the item moves to the **Posted Item Area**, the **Enter a Serial Number** prompt will display
- type the Serial Number, Click **OK (Enter)** and the item will **Post** with the serial # directly under it
 - use the Serial Number on the actual tool and not the Serial Number on the box
- if the item is being sold to someone who does not have an account, the **Required Consumer Information** prompt will appear as you proceed to the **Totals Screen**
 - **Required Consumer Information**
 - we usually ask for a **Name, Phone Number** and/or **Email Address** so we can assist the customer with any potential warranty claims if needed
 - if the customer does not want to give you any personal information, type **RTS** in the **Name** field, Click **OK (Enter)** to proceed to the **Totals Screen**

Sell a Gift Card

- minimum = \$1.00 and maximum = \$3001.00
- type **GIFTCARD** in the **Item** field, press **Tab**, at **Quantity** type the quantity being sold, press **Tab**, at **Price**, type the desired gift card amount, press **Enter**
- Click **Total (KPad +)** to proceed to the **Totals Screen**
- follow normal steps as you complete the transaction
- the **Activation** prompt will display, with the **Gift Card Amount** already filled in
- swipe the gift card through the Pin Pad and the transaction will finalize
- gift cards can only be sold on a **Sale** transaction and not on an **Order** or **Special-Order**
- you can sell a gift card with other items on the same **Sale** transaction
- gift cards may be sold in multiples if they are for the same amount
 - Example: customer wants 2 gift cards, both for \$50.00
 - at **Item**, type **GIFTCARD**, at **Quantity**, type **2** and at **Price**, type 5000 or 50.00
 - when you get to the **Activation** prompt you will swipe 2 cards
- if a customer wants 2 gift cards for different amounts, you must post the gift card SKU two times
 - at **Item**, type **GIFTCARD**, at **Quantity** type **1**, at **Price** type 5000 or 50.00, press **Enter**
 - at **Item**, type **GIFTCARD**, at **Quantity** type **1**, at **Price** type 7500 or 75.00, press **Enter**
 - when you get to the **Activation** prompt you will swipe 2 cards

**** Once You Reach the Activation Prompt, You Must Swipe & Never Try To Cancel The Transaction ****

Check a Gift Card Balance

- at the **Posting Screen**, with the cursor in the **Item** field and no items in the **Posted Item Area**, Click **Misc. (KPad -)** to bring up the **No Sale Menu** (the **Customer** must be the default cash account to access the **No Sale Menu**)
- Click **F Gift Card Maintenance (F)** to bring up the **Gift Card Menu**, Click **2 Check Balance (2)**
- the **Check Balance** prompt will display, swipe the gift card through the Pin Pad

*** * * Never Use Any Of The Other Options in The Gift Card Menu * * ***

Adding More Money To an Existing Gift Card

- type **ADDFUNDS** in the **Item** field, press **Tab**, at **Quantity** type 1, press **Tab**
- at **Price**, type the desired amount the customer wants to add to the existing gift card, press **Enter**
- Click **Total (KPad +)** to proceed to the **Totals Screen**
- follow normal steps as you complete the transaction
- the **Add Funds** prompt will display, with the **Add Funds Amount** already filled in
- just swipe the gift card through the Pin Pad and the transaction will finalize

*** * * Once You Reach the Add Funds Prompt, You Must Swipe & Never Try Cancel The Transaction * * ***

3 Ways To Access Item Information

Displayed Item Information Box

- when you need additional information about an item
- at the **Posting Screen**, with a **SKU** entered in the **Item** field, Click **Display (KPad /)**
- to view similar items, Click **Next (F7)** and/or **Previous (F8)** which will cycle through similar SKUs
 - Example: you need to know all the different 2 x 4 lengths you have in stock
 - type **248SP** in **Item**, Click **Display (KPad /)**, Click **Next (F7)** to cycle through all the various 2 x 4 items you have in stock

Look Up an Item With Description

- at the **Posting Screen**, with the cursor in the **Description** field, type what you are looking for, press **Enter**
- this will bring up the **Inventory Viewer**, with description as the **Look Up** field
- if your location does not have any items matching the description the **Inventory Viewer** will be empty
- use the **Store** field and change to **ALL** to see if any of the other locations carry the item
- 'less is more' with this search function because POS will find items that have an exact match to what you type
- the Asterix * should always be the last character you type when using this search function because this tells POS that it does not matter what comes after the last letter

Look Up an Item With UPC or Manufacturer Part

- at the **Posting Screen**, with the cursor in the **Description** field, type the UPC or Mfg Part #, press **Enter**
- this will bring up the **Inventory Viewer**, with description as the **Look Up** field
- if your location does not have an item with the UPC / Mfg Part #, the **Inventory Viewer** will be empty
- use the **Store** field and change to **ALL** to see if any of the other locations carry the item

Most Used Miscellaneous Functions

Insert a Comment Line Immediately After Posting an Item

- at the **Posting Screen**, in the **Item** field, Click **Comment (F3)** to display the **Comments and Notes** prompt
 - begin typing your note, Click **OK (Enter)**
 - to insert a single blank line, do not type anything, just Click **OK (Enter)**
 - press **Ctrl Enter** to add new lines, can be blank or you can type, then Click **OK (Enter)**

Insert a Comment Line or SKU Between 2 Existing Lines

- at the **Posting Screen**, in the **Item** field, Click **Menu (KPad -)** to display the **Posting Menu**
- Click **2 Insert a Line (2)**, to display the **Insert After Line Number** prompt
- at **Line Number**, type the line number after which you want to insert a new line, Click **OK (Enter)**
- **"Insert a Line after line 2"** displays across the bottom of the screen, cursor is in **Item** field
- to add a SKU, just **Post** a new SKU as normal
- to add a comment line, text or blank, Click **Comment (F3)** to display the **Comments and Notes** prompt

Change Customer During a Transaction

- there may be times when you will need to change the **Customer** during a transaction
- at the **Posting Screen**
 - put the cursor in the **Customer** field directly under the **Transaction Type** heading
 - enter correct number in **Customer**, and in **Job Number** when applicable, press **Enter**
 - the **Repricing is required** prompt may display, press **Enter**
 - the **Prices** for all the **Posted Items** will change to the new retail **Price**

Void an Item

- to void one or more **Posted** items, but not the entire transaction
- at the **Posting Screen**, with the cursor in the **Item** field
 - Click **Void (F10)** & the **Void Item** display prompt will appear
 - type the **Ln#** of the item you want to remove in the **Void Line Number** field, press **Enter**
 - the **Description** of the **Item** will change to *** * Item Voided * ***

Void a Transaction

- 2 ways to void an entire transaction
- from the **Posting Screen**, with the cursor in the **Item** field
 - Click **Void (F10)** 2 times, or Click **Void Trx (Shift F10)** to display the **Void Transaction** prompt
 - press **Enter**

Discount an Item

- to discount a single item
- at the **Posting Screen**, type the **SKU** in the **Item** field, press **Tab**, at **Quantity** type the quantity being sold
- Click **Disc (Ctrl D)**, to display the **Discount Item** prompt
 - **Discount Percent**
 - to deduct a percent off the retail EX - to take 20 percent off, type **20** & press **Enter**
 - **Discount Price**
 - specifies the discount price
 - **Discount Amount Off**
 - to reduce the retail price by a specific amount

Discount a Transaction

- to discount an entire transaction
- at the **Totals Screen**
 - Click **Disc (Ctrl D)**, to display the **Trade Discount** prompt
 - **Discount Percent**
 - do not use decimal or %, EX - to take 20 percent off, type **20** & press **Enter**
 - **Dollars Off**
 - enter dollar amount, remember POS always assumes 2 decimal places to the right
 - EX: to take 20 dollars off, type 2000 or 20.00 & press **Enter**
 - the **Total Due** will change, and the **Trade Discount** amount appears at the bottom of the screen

Sell an Item at No Charge or Override a Price

- at the **Posting Screen**, type the **SKU** in the **Item** field, press **Tab**, at **Quantity** type the quantity being sold
- Click **Misc. (KPad -)** to display the **Posting Menu (SKU Entered)** viewer
- Click **4 Sell Item at No Charge (4)** and the **Item** will **Post** with a **Price** of **0.00**
- to override the assigned **Price** of an **Item**
 - type the **SKU** in the **Item** field, press **Tab**, at **Quantity** type the quantity being sold, press **Tab**
 - at **Price**, type the price you want to sell the item at, press **Enter**
 - the **Check Price** prompt might display, Click **Yes (Enter)** to sell the item at the **Price** you manually typed

Sell an Item Without Tax

- at the **Posting Screen**, type the **SKU** in the **Item** field, press **Tab**, at **Quantity** type the quantity being sold
- Click **No Tax (Ctrl T)** and the **Item** will **Post** as normal, but no tax will be assessed on the item

Display All Postings of a SKU

- use this to find all the occurrences of a SKU on a transaction
- at the **Posting Screen**, with the cursor in the **Item** field, Click **Misc. (KPad -)**, to display the **Posting Menu**
- Click **S All Occurrences of SKU (S)**, to display the **Find SKU** prompt
- type the **SKU**, Click **OK (Enter)** and the **Press Clear When Done** prompt will display, Click **OK (Enter)**
- the **Posted Item Area** has changed to only display that **SKU**
- once you done reviewing / working with the **SKU**, Click **Clear (F12)** to display all the other **Lines** on the transaction

Split Tender (Accepting Multiple Payment Types)

- when someone wants to pay with 2 or more tender types
- put cursor in the first tender type box & type amount, press **Enter**
- a message will appear at the bottom of the screen with the remaining amount needed
- put cursor in the second tender type box & type amount, press **Enter**
- continue this process until you have received enough money to complete the transaction

Example: **Total Due** = \$107.62, paid with \$60 cash and the remainder with a check

- 6000 or 60.00, **Enter**, "**Amount entered is \$47.62 less than amount due the store**"
- **Tab**, 4762 or 47.62, **Tab**, type the check number in **Number**, **Enter**

Cash a Check

- at the **Posting Screen**, with the cursor in the **Item** field and no items in the **Posted Item Area**, Click **Misc. (KPad -)** to bring up the **No Sale Menu** (the **Customer** must be the default cash account to access the **No Sale Menu**)
- Click **4 Cash a Check (4)** to open the **Cash-A-Check** prompt
- at **Check Amount**, type the amount of the check, press **Tab**
- at **Check Number**, type the check number, Click **OK (Enter)**
- the cash drawer will open, and a prompt display will appear notifying you to close the cash drawer, Click **OK (Enter)**
- POS returns to the **Clerk Sign On Screen**

Open the Cash Drawer

- at the **Posting Screen**, with the cursor in the **Item** field and no items in the **Posted Item Area**, Click **Misc. (KPad -)** to bring up the **No Sale Menu** (the **Customer** must be the default cash account to access the **No Sale Menu**)
- Click **1 Open Cash Drawer (1)**; the cash drawer will open, the **No Sale Menu** closes, the receipt printer will print a record that the cash drawer was opened, and POS returns to the **Clerk Sign On Screen**

Print a Gift Receipt

- at the **Posting Screen**, with the cursor in the **Item** field and no items in the **Posted Item Area**, Click **Misc. (KPad -)** to bring up the **No Sale Menu** (the **Customer** must be the default cash account to access the **No Sale Menu**)
- Click **G Print Gift Receipt (G)** to display the **Print Gift Receipt** prompt with the most recent transaction loaded
- to print a gift receipt for that transaction, Click **OK (Enter)**
- to print a gift receipt for a different transaction, Click **Other Doc**
- the **Store** field will default to your location but can be changed if needed
- if you know the document number, type it in the **Document** field and Click **OK (Enter)**
- if you need to find the document, Click **Q. Recall** to open the **Quick Recall Viewer**
- once you have found the document and it is highlighted in blue, press **Enter**
- the **Quick Recall Viewer** will close and the document you selected is now loaded in the **Print Gift Receipt** display
- Click **OK (Enter)** to print the gift receipt

Reprint an Invoice

- at the **Header Screen**, type the account number in the **Customer** field and the job number in the **Job Number** field when applicable
- Click **Misc. (KPad -)** to display the **Header Menu**
- Click **2 Reprint, View or Fax Invoice (2)** to display the **Reprint, View, Fax or Email This Invoice** prompt
- if you know the document number, type it in the **Document** field and Click **OK (Enter)**
- if you need to find the document, Click **Q. Recall** to open the **Quick Recall Viewer**
- once you have found the document and it is highlighted in blue, press **Enter**
- the **Quick Recall** Viewer will close and the document you selected is now loaded in the **Reprint, View, Fax or Email This Invoice** prompt, Click **OK (Enter)** to have the document print out
- POS returns to the **Clerk Sign On Screen**

Suspend a Transaction

- to be used when you want to get out of a transaction and have it saved for later use
- you must be on the **Totals Screen**
- Click **Suspend (Ctrl S)** to display the **Suspend Transaction Reference** prompt
- at **Reference**, type reference which you will remember and Click **OK (Enter)**
- the **Document Number** prompt will appear, notifying you that a document number has been assigned
- the transaction will close out and return to the **Clerk Sign On Screen**

Recall a Suspended Transaction

- from the **Header Screen**, Click **Misc. (Kad -)** to open the **Header Menu**
- Click **Recall Suspended Transaction (7)** to display the **Suspended Transaction** prompt
- use the arrow keys to find the correct document, once it is highlighted in blue Click **OK (Enter)**
- the document will be 'pulled in' and can be worked on

Create an Order

Orders Are Used To Hold Stock Items Until The Customer Is Ready To Take Ownership
If The Customer Wants The Items Delivered You Must Create An Order

Step 1: POS Header Screen

1. **Customer:** Enter account number, or type customer / business name to find account number
2. **Job Number:** Type job number if applicable
3. **Order:** Click **Order (F8)**
4. **Short ID:** If the customer does not have an account, enter the customer's last name. ****Do not skip this step – Short ID is important when searching for a customer's open order or past invoice****
5. **P.O. Number:** For a customer's P.O. and/or reference
6. **Phone:** Include area code. Type phone number without any spaces or dashes.
7. **Ref:** General description of item(s) on the document. Not always necessary, but helpful
8. **Ship To:** Customer's full name or a job name
9. **Ship Via:** The official 911 street address: No apt #, descriptions, etc.
 - a. It is also a hyper-link and must be used if item(s) will be delivered, **(See Schedule a Delivery)**
10. Any applicable apartment number, description, etc. or for you to make a note of some type
11. Town and State. Zip code can be entered, but not necessary
12. **Special Instr:** What you type here will print in the body of the document. Good place to leave instructions for the driver etc.
13. **Tax:** Use drop down box to select correct tax code when applicable
14. **Delivery:** Adjust to the correct date if item(s) will be delivered, **(See Schedule a Delivery)**
15. **Post:** Click **Post (F11)** to proceed to the **Posting Screen**

Step 2: Post The SKUs

Posting Screen

CREATE ORDER

Customer: *9 CASH CUSTOMER MANCHESTER P.O.:

Job Number:

Sales Rep: CPOS CONTRACTOR POINT OF SALE

Ln#	Sku	Description	Qty	U/M	Price	Extension
1	248SP	2X4X8 KD STUD / 2&BTR SPF	100	EA	2.66	265.60
2	2812SP	2X8X12 KD 2&BTR WESTERN SPF	50	EA	15.33	766.45
3	34PX	3/4 4X8 PINE CDX PLYWOOD 23/32"			27.88	696.96
4	IKOCDG	IKO CAMBRIDGE LT DUAL GREY 3/SQ	20	BL	33.66	673.20
5	WRG	GRACE ICE & WATER 2SQ	2	EA	156.60	313.20

33337 Subtotal 2715.41

1 Item 31224MW Quantity 15 Price Addt'l In

Description Cost

4. Item Posting Area

- cursor defaults to **Item** field
- type **SKU** or scan **UPC**
- if you typed the **SKU**, then **Tab** over to the **Quantity** and enter correct amount, press **Enter**
- if you scanned the **UPC**, the **Quantity** fills in for you
- if you need additional information about the **SKU**, Click **Display (KPad /)**
- continue scanning **UPC's** or typing **SKUs** until all items have moved to the **Posted Item Area**

5. Click **Total (KPad +)** to get to **Totals Screen**

Step 3: Finish Order Screen

Finish Order

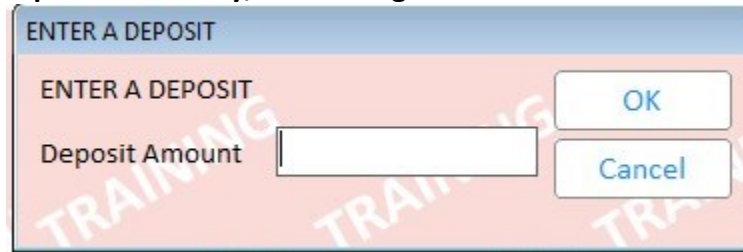
- 1 Save without printing
- 2 Save and print
- 3 Invoice this order
- 4 Enter trade discount

1. Save and Print: Click 2 Save and Print (KPad 2)

You Must Select, "2 Save and Print" Even If You Do Not Want A Printed Paper Copy
The Print Function Is Very Important for Numerous Reasons
The Last Step in This Process Will Decide If A Paper Copy Actually Prints

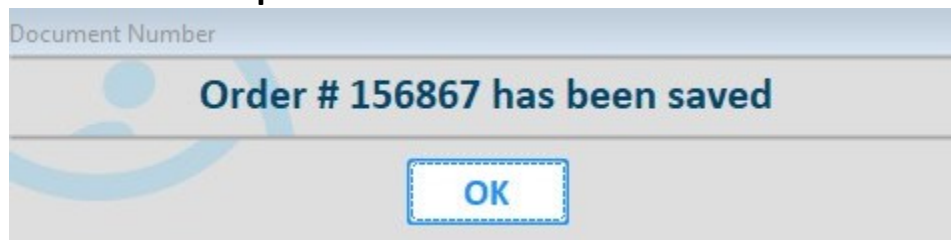
Step 4: Enter A Deposit Screen

Deposit Requirements Vary, See Manager At Your Location For More Detail.



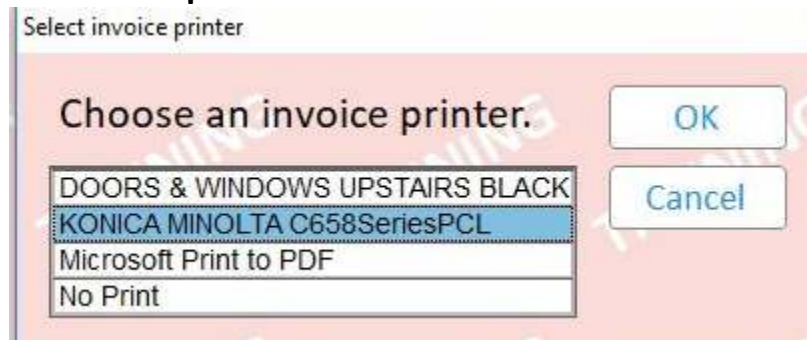
If a deposit is not required, or the order is being charged to a customers charge account, Click **OK (Enter)**

Step 5: Document Has Been Created



Click **OK (Enter)**

Step 6: Select Invoice Printer Screen



This is When You Decide Whether or Not You Need a Printed Paper Copy. Also give you the opportunity to "Print to PDF" (save a PDF copy of the order or invoice). Useful for emails, etc.

Schedule a Delivery

Posting Screen

- scheduling deliveries in DDMS is the same for Orders and Special Orders
- the process must be followed to ensure the order flows into DDMS

- Customer's full name or a job name
- The official 911 street address: No apt #, descriptions, etc.
- Any applicable apartment number, description, etc. or for you to make a note of some type
- Town and State. Zip code can be entered, but not necessary
- Use drop down box to select correct tax code
- Use drop down to select the delivery date
 - All Special Orders shall be scheduled on December 25th of the current year. This allows the order to be set up in DDMS prior to receipt. Once we have received the item(s) the designated employee (varies by location) shall notify the DDMS dispatcher via email or in person with the order number allowing the dispatcher to coordinate and schedule the delivery by searching orders scheduled on December 25th.
 - If the customer wants to pick up their item(s) set the **Delivery** date to January 1st of the following year. Still try to get a delivery address. We have found that many times customers will call and ask if we can deliver the item(s) instead. Setting the **Delivery** date to January 1st of the following year for customer pickups, allows the dispatcher to easily search and manage the process.
- [Ship Via](#): Once all the information has been entered correctly, click to display the **Shipping Options** prompt

Shipping Options

You Must Fill Out The Following Three Fields:
Ship Via, Delivery Time & Load type.

Ship Via: use the drop down to select the appropriate asset type that will efficiently deliver the material

- there is a customer pick up option and should be selected when applicable
- if a certain truck is not specified by the customer, select “Our Truck.” This gives dispatch the most freedom when it comes to setting up an efficient delivery schedule

Delivery Time: use the drop-down box to select the appropriate delivery time. If the customer does not specify a certain time that that would like their material, select “Anytime.”

- there is a customer pick up option and should be selected when applicable

Load Type: use the drop-down box to select the appropriate load type. The majority time, use “Building Materials.”

Special Note: Avoid defaulting to FRFD (First Run, First Drop) when arranging a delivery. A series of questions should be asked of the customer to determine the appropriate time for each delivery.

When you get to the **Finish Order** or **Finish Special Order** prompt at the end of the transaction:

You Must Select, “2 Save and Print” Even If You Do Not Want A Printed Paper Copy
The Print Function Is What Sends The Delivery Information to DDMS
The Last Step in This Process Will Decide If A Paper Copy Actually Prints

Finding an Order or Special Order and How to Invoice

- if you know the order number, enter it in the **Customer** field on the **Header screen** with a period at the beginning. Do not include the number after the / at the end. Press **Enter** and the order information will populate the screen.
Ex: If your Order Number is **201739/1**, type **.201739** in the **Customer** field – notice the period at the beginning and no **/1** at the end.

If you do not know the order number, follow the steps below to find it:

- at the **Header Screen**, enter the account number in **Customer** and when applicable the job number in **Job Number**
- Click **Misc. (KPad -)** to display the **Header Menu**
- Click **Documents (5)** to display the **Document Viewer**
- use the various fields at the top to filter down more if needed. This is where **Short ID** comes in handy for cash customers (see **Create and Order** for more info on **Short ID**).
- once you have found the correct document and it is highlighted in blue, press **Enter**
- the document will be 'pulled into POS' and you will be back on the **Header Screen** with that document 'loaded'
- Click **Post (F11)** to proceed to the **Posting Screen**
- Click **Total (KPad +)** and the **Finish Order** prompt will display
- Click **Invoice This Order (3)** to get to the **Totals Screen**
- follow the appropriate steps to finalize this transaction

How to Partially Invoice an Order or Special Order

- if you know the order number, enter it in the **Customer** field on the **Header Screen** with a period at the beginning. Do not include the number after the / at the end. Press **Enter** and the order information will populate the screen.
Ex: If your Order Number is **201739/1**, type **.201739** in the **Customer** field – notice the period at the beginning and no **/1** at the end.

If you do not know the order number, follow the steps below to find it:

- at the **Header Screen**, enter the account number in **Customer** and when applicable the job number in **Job Number**
- Click **Misc. (KPad -)** to display the **Header Menu**
- Click **Documents (5)** to display the **Document Viewer**
- use the various fields at the top to filter down more if needed. This is where **Short ID** comes in handy for cash customers (see **Create and Order** for more info on **Short ID**).
- once you have found the correct document and it is highlighted in blue, press **Enter**
- the document will be 'pulled into POS' and you will be back on the **Header Screen** with that document 'loaded'
- Click **Post (F11)** to proceed to the **Posting Screen**
- Click **Misc. (KPad -)** to display the **Posting Menu**
- Click **Partially Invoice Order (3)** to display the **Invoice Line Selection** prompt
- choose the option that works best to invoice the item(s)
- Click **Total (KPad +)** to proceed to the **Totals Screen**
- the **Totals Due** will reflect only the item(s) you selected to invoice
- follow the appropriate steps to finalize this transaction
- the document will remain open, under the same number with the remaining item(s) that were not invoiced

Hardware Special Order: Depts 1 - 16

Step 1: POS Header Screen

CREATE SPECIAL ORDER

1 Customer: CASH CUSTOMER MANCHESTER

2 Job Number: []

3 SpOrd

4 Short ID: SMITH

5 P.O. Number: []

Order #: [] Phone: (802) 255-1234 6

7 Ref: 16 OZ BRASS PLUMB BOB

8 Ship To: JOHN SMITH

9 Ship Via: 1234 SCHOOL STREET

10 UNIT # 3

11 RUTLAND VT 01234

12 Special Instr: []

Expected: 10/22/19 Src Vendor: []

14 Print: Y Stocked Type: P

Pricing: 1 Codes: []

Created: 10/22/19 By: CS Store: 1

Terms: 3 NET ON RECEIPT

13 Tax: 11 VT / RUTLAND TOWN

Salesperson: []

Resale #: []

Address: 05255

INFO

Credit Message

15 Post

1. **Customer:** Enter account number, or type customer / business name to find account number
2. **Job Number:** Type job number if applicable
3. **SpOrd:** Click **SpOrd (F4)**
4. **Short ID:** If the customer does not have an account, enter the customer's last name
5. **P.O. Number:** For a customer's P.O. and/or reference
6. **Phone:** Include area code
7. **Ref:** General description of item(s) on the document. Not always necessary, but helpful.
8. **Ship To:** Customer's full name or a job name
9. **Ship Via:** The official 911 street address: No apt #, descriptions, etc.
 - a. It is also a hyper-link and must be used if item(s) will be delivered, *(See DDMS Manual for Details)*
10. Any applicable apartment number, description, etc. or for you to make a note of some type
11. Town and state. Zip code is not necessary
12. **Special Instr:** What you type here will print in the body of the document
13. **Tax:** Use drop down box to select correct tax code when applicable
14. **Expected:** Adjust to the correct date if item(s) will be delivered, *(See DDMS Manual for Details)*
15. **Post:** Click **Post (F11)** to proceed to the **Posting Screen**

Step 2: Create The ZZ SKU

Posting Screen

The screenshot shows the 'Add Automatically Generated SKU' dialog box with the following fields and values:

- Vendor Part Number: 20882 (Numbered 2)
- Description: PLUMB BOB BRASS 16OZ 6" (Numbered 3)
- Order Qty: 1 (Numbered 4)
- List: (Empty)
- Cost: 7.37 (Numbered 5)
- Retail: 11.99 (Numbered 6)
- Vendor: EJD (Numbered 7)
- Manufacturer: (Empty)
- Mfg Part #: 47-974 (Numbered 8)
- Order Multiple: 1 (Numbered 9)
- Weight: (Empty)
- Stocking Unit: EA
- Purchase Unit: EA
- Add To Additional Stores: 1 (Numbered 10)

Buttons on the right: OK, ReCalc, Ext Desc, Cancel.

1. **Item:** Enter template SKU, press **Enter** & **Add Automatically Generated SKU** box appears
 - a. Template SKUs begin with "SO" and are used to create ZZ SKUs
 - b. Each Department has a SO Template SKU and must be used correctly
 - c. EX: Customer wants a Makita tool, Use SO2, since Dept 2 is "Hand Tools /Power Tools"
2. **Vendor Part Number:** Number assigned to item by the vendor (EX: EJD = SKU & Orgill = Item No)
3. **Description:** 30 character maximum, spaces and punctuation included
4. **Order Qty:** How many the customer is ordering
5. **Cost:** What our vendor charges us
6. **Retail:** What we charge our customer
7. **Vendor:** Some Template SKUs will have assigned Vendors and this box populates automatically
 - a. If box is empty, enter Vender #, or type "=Vendor Name" to find correct Vendor Number
8. **Mfg Part #:** Number assigned to the item by the manufacturer
9. **Order Multiple:** Quantity the vendor sells the item by
 - a. Very important fact to consider before committing to the customer
 - i. EX: Customer wants 1, Vendor only sells by case of 6
10. Click OK (Enter)

If Boxes 2, 4, 7, 8, & 9 Do Not Have Accurate Information the Item May Not Get Ordered Properly or at

All

****** CAUTION ******

There Is A Glitch in The Software Between Step 3 & Step 4

The ZZ SKU Can Disappear from The Document

Proceed Slowly & Continue to Follow Instructions to Avoid This Glitch

Your Management Team Will Provide More Detail in Person

Step 3: The ZZ SKU Has Been Created

Posting Screen

1. **P.O. #:** Use drop down arrow, select **Buyer** and press **Enter** to Post the ZZ SKU
 - a. This puts the item on the **Buyer List** & enables the Hardware Purchasing Group to order
2. **Item:** The ZZ SKU has been created
 - a. The format of the number contains a lot of very useful information **ZZ 001 979291 001**
 - i. **ZZ** – Notates it is a Special-Order item
 - ii. **001** – Store Id # from the POS Document where the ZZ SKU was
 - iii. **1979291** – The POS document # the SKU was created on, see Step 6 (pg. 4)
 - iv. **001** – Line within the POS document the ZZ SKU is on

***Multiple ZZ SKUs Can Be Created on The Same Document if All SKUs Are Sourced from Same Vendor
Repeat Step 2 & Step 3 Until All ZZ SKUs Have Been Created***

3. Click **Total (KPad +)** to proceed to the **Totals Screen**

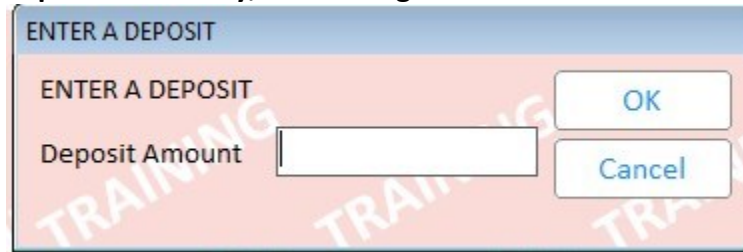
Step 4: Finish Special Order Screen

2. **Save and Print:** Click 2 **Save and Print (KPad 2)**

***You Must Select, "2 Save and Print" Even If You Do Not Want A Printed Paper Copy
The Print Function Is Very Important for Numerous Reasons
The Last Step in This Process Will Decide If A Paper Copy Actually Prints***

Step 5: Enter A Deposit Screen

Deposit Requirements Vary, See Manager At Your Location For More Detail



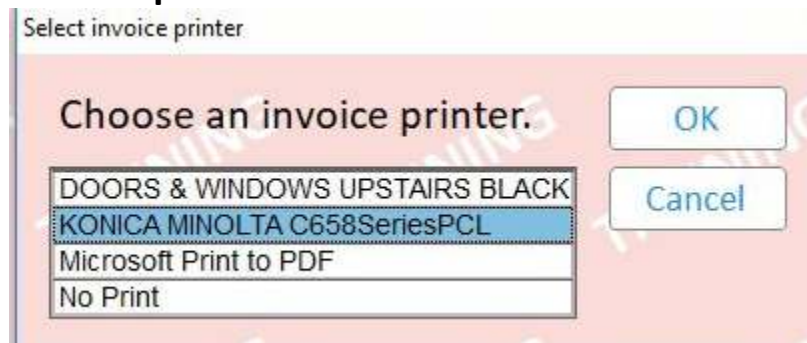
If a deposit is not required, Click **OK (Enter)**

Step 6: Document Has Been Created



Click **OK (Enter)**

Step 8: Select Invoice Printer Screen



This is When You Decide Whether or Not You Need a Printed Paper Copy

LBM Special Order: Depts 21 – 58

Step 1: POS Header Screen

CREATE SPECIAL ORDER

1 Customer: *g CASH CUSTOMER MANCHESTER

2 Job Number: [dropdown]

3 SpOrd

4 Short ID: JONES

5 P.O. Number: [text field]

6 Phone: (802) 555-9876

7 Ref: PANELS

8 Ship To: MELINDA JONES

9 Ship Via: 88 RABBIT LANE

10 [text field]

11 VT

12 Special Instr: [text field]

13 Tax: 10 VT STATE ONLY

14 Delivery: 03/02/20

15 Post

Created: 2/24/20 By: CPOS Store: 1

Terms: 3 NET ON RECEIPT

Salesperson: [dropdown]

Resale #: [text field]

Address: 05255

Print Prices: Y Stocked Type: P

Pricing: 1 Codes: [text field]

INFO

[Credit Message](#)

16. **Customer:** Enter account number, or type customer / business name to find account number

17. **Job Number:** Type job number if applicable

18. **SpOrd:** Click **SpOrd (F4)**

19. **Short ID:** If the customer does not have an account, enter the customer's last name

20. **P.O. Number:** For a customer's P.O. and/or reference

21. **Phone:** Include area code

22. **Ref:** General description of item(s) on the document

23. **Ship To:** Customer's full name or a job name

24. **Ship Via:** The official 911 street address: No apt #, descriptions, etc.

a. It is also a hyper-link and must be used if item(s) will be delivered, *(See DDMS Manual for Details)*

25. Any applicable apartment number, description, etc. or for you to make a note of some type

26. Town, State & Zip Code

27. **Special Instr:** What you type here will print in the body of the document

28. **Tax:** Use drop down box to select correct tax code when applicable

29. **Expected:** Adjust to the correct date if item(s) will be delivered, *(See DDMS Manual for Details)*

30. **Post:** Click **Post (F11)** to proceed to the **Posting Screen**

Step 2: Create The Purchase Order Posting Screen

11. **Item:** Type **NS**, press **Enter**, press **Tab** 4 times, until the cursor is in **Vendor** field
12. **Vendor:** Type the Vender #, or type “=Vendor Name” to find correct Vendor Number, **Tab**
13. **P.O. #:** Type **RSRV**, press **Enter**
14. **Reserve a Purchase Order Number** prompt will appear, press **Enter**
 - a. **P.O. Number:** POS auto-generates a 7 to 10 digit #, with the last digit(s) being the Store ID #
 - i. EX: Manchester’s Store ID = 1, so the last digit of the **P.O. Number** will be 1
 - b. **Due Date:** System assigns a due date, can & should be changed if needed

Step 3: PO Has Been Reserved Screen

You Will Need This PO # In The Next Step SO Make Sure You Write It Down
Press **Enter**, then Immediately press **F12**

This Is The Purchase Order Number That Will BE Used To Receive The SO Item(s) Into Our System

You Will Need This PO Number When You Place The Order With The Vendor

Use the Following PO Format When Placing the Order with The Vendor:

“P.O. Number-SO” (2924001 SO)

This Format Is a Simple and Easy Way to Manage SO Items When They Arrive

Example:

Truck Arrives at Store, Driver Gives Material Handler an Invoice with “2924001 SO”

Material Handler Instantly Knows This is A SO Item and Not a Stock Item

There MUST be a space between the number POS generated (2924001) and the SO when you give it to the vendor

This is VERY important for administrative functions with our accounting office

Step 4: Create The ZZ SKU Posting Screen

The screenshot shows the 'CREATE SPECIAL ORDER' posting screen. It is divided into two main sections. The left section contains fields for 'Customer' (set to *9), 'Job Number', 'Sales Rep' (set to CPOS), and a table with columns 'Ln#' and 'Sku'. Below this is an 'Item' field with 'SO24A' entered, and 'Description' and 'Vendor' fields. The right section is titled 'Add Automatically Generated SKU' and contains fields for 'Vendor Part Number', 'Description' (4' X 10' T111), 'Order Qty' (100), 'List' (38.00), 'Cost' (60.00), 'Retail' (480), 'Vendor' (480), 'Manufacturer', 'Mfg Part #', 'Order Multiple' (1), 'Weight', 'Stocking Unit' (EA), 'Purchase Unit' (EA), and 'Add To Additional Stores' (1). On the far right are buttons for 'OK', 'ReCalc', 'Ext Desc', and 'Cancel'. Numbered callouts (1-8) point to specific fields: 1 to the Item field, 2 to the Description field, 3 to the Ext Desc button, 4 to the Order Qty field, 5 to the List field, 6 to the Retail field, 7 to the Vendor field, and 8 to the OK button.

1. **Item:** Enter template SKU, press **Enter & Add Automatically Generated SKU** box appears
 - c. Template SKUs begin with "SO" and are used to create ZZ SKUs
 - d. Each Class has a SO Template SKU and must be used correctly
 - e. EX: Customer wants T111 in 10' length; Use SO24A, since Class 24A is "Sheathings"
2. **Description:** 30 character maximum, spaces and punctuation included
3. **Ext Desc:** Use if item requires longer description. ***Do Not Type More Than 11 Lines***
 - a. Using this box links the description/ notes to the SKU
4. **Order Qty:** How many the customer is ordering
5. **Cost:** What our vendor charges us
6. **Retail:** What we charge our customer
7. **Vendor:** Use the same number you used in Step 2
8. Once you have filled in all the necessary fields, Click **OK (Enter)**

***** CAUTION *****

***There Is A Glitch in The Software Between Step 4 & Step 5
The ZZ SKU Can Disappear from The Document
Proceed Slowly & Continue to Follow Instructions to Avoid This Glitch
Your Management Team Will Provide More Detail in Person***

Step 5: The ZZ SKU Has Been Created Posting Screen

CREATE SPECIAL ORDER

Customer: *9
Job Number:
Sales Rep: CPOS

ZZ001156864001 - 4' X 10' T111 - Store 1

Stock Information				Matrix Prices		Activity	
Available	0 EA	Loc	SO	Policy A	P1	60.000	Last Sale
On Hand	0	Loc2		Loc3	P2	60.000	Last Receipt
On Order	0	Mfg #	SO21A		P3	60.000	Last Retail
Committed		OM/Std	1/1	RainQty	P4	60.000	Last Change
Cust Price	60.00	Reg Price			P5	60.000	Added 02/24/20
	382000 /36266	Vendor	480		Quantity Breaks		
Recent Promotion Prices					Level 1		
Recent		Start	End		Level 2		
Older					Level 3		
Oldest					Level 4		
					Level 5		

Item: ZZ001156864001 Quantity: 100 EA Price: 60.00 EA
Description: 4' X 10' T111 Cost:
Vendor: 00480 P.O.#: 2924001

4. P.O. #: Type the number from Step 3, Enter

5. Item: The ZZ SKU has been created

- a. The format of the number contains a lot of very useful information **ZZ 001 156864 001**
 - i. **ZZ** – Notates it is a Special-Order item
 - ii. **001** – Store Id # from the POS Document where the ZZ SKU was created
 - iii. **156864** – The POS document # the SKU was created on, see Step 8
 - iv. **001** – Line within the POS document the ZZ SKU is on

Multiple ZZ SKUs Can Be Created on The Same Document if All SKUs Are Sourced from Same Vendor
Repeat Step 4 & Step 5 Until All ZZ SKUs Have Been Created

6. Click Total (KPad +) to proceed to the Totals Screen

Step 6: Finish Special Order Screen

Finish Special Order

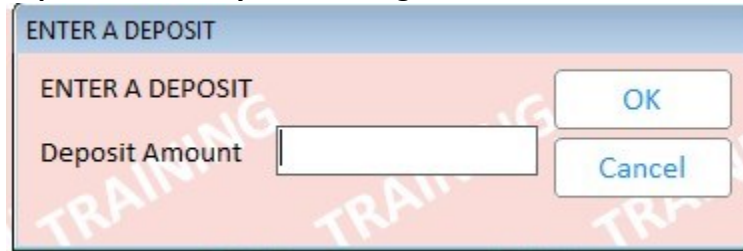
1 Save without printing
2 Save and print 1
3 Invoice this special order

3. Save and Print: Click 2 Save and Print (KPad 2)

You Must Select, "2 Save and Print" Even If You Do Not Want A Printed Paper Copy
The Print Function Is Very Important for Numerous Reasons
The Last Step in This Process Will Decide If A Paper Copy Actually Prints

Step 7: Enter A Deposit Screen

Deposit Requirements Vary, See Manager At Your Location For More Detail

A dialog box titled "ENTER A DEPOSIT" with a light blue header. The main area has a light pink background. It contains the text "ENTER A DEPOSIT" and "Deposit Amount" followed by a white text input field. To the right of the input field are two buttons: "OK" and "Cancel", both with blue text and white backgrounds.

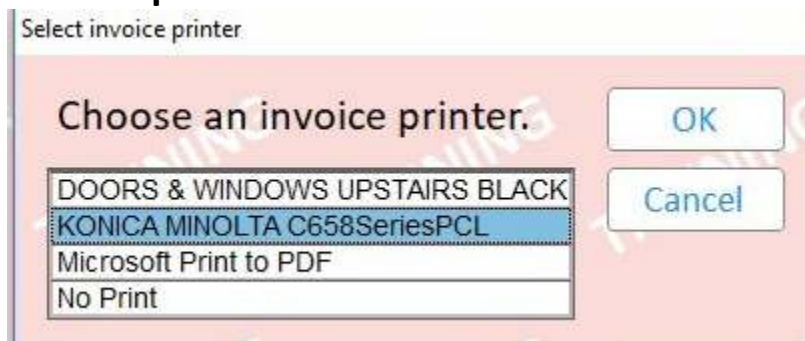
If a deposit is not required, Click **OK (Enter)**

Step 8: Document Has Been Created

A message box with a light blue header containing the text "Document Number". The main area has a light gray background and displays the message "Special order # 156864 has been saved" in bold blue text. At the bottom center is a button with a blue border and blue text that says "OK".

Click **OK (Enter)**

Step 9: Select Invoice Printer Screen

A dialog box titled "Select invoice printer" with a light yellow header. The main area has a light pink background. It contains the text "Choose an invoice printer." and a list box with four items: "DOORS & WINDOWS UPSTAIRS BLACK", "KONICA MINOLTA C658SeriesPCL" (which is highlighted with a blue background), "Microsoft Print to PDF", and "No Print". To the right of the list box are two buttons: "OK" and "Cancel", both with blue text and white backgrounds.

This is When You Decide Whether or Not You Need a Printed Paper Copy

Returns Validation

POS Process for Processing Customer Returns

Summary

Returns Validation helps you quickly tie returns to invoices. Invoices are easily accessible, and you will be guided through the return transaction step-by-step. Returns Validation will assist you with. . .

1. Finding the original sale
2. Pulling in data from the original sale
3. Permanently tying the original sale to the return
4. Making the return data easy to find

The Quick Recall Viewer is still a resource for you to use when necessary. Returns Validation displays sales data in such a way that using the Quick Recall Viewer will no longer be necessary for most returns.

General Return Rule - item comes back the way it went out

- Need to make sure the item being returned was purchased from one of our locations
- Item needs to be in the same physical condition it was when purchased
 - o continue to follow the exceptions your management team allows
- When a credit is given, it needs to match the original tender type
 - o invoiced to customer 123456 job 5, credit is to customer 123456 job 5
 - o invoiced to CC ending in 5432, credit is to CC ending in 5432
 - o your management team will have the ability to deal with exceptions

Key Definitions

- **Numbered Accounts** – all accounts which begin with a number
- **Default Cash Customer** – *9, *2, *3, *6, *4 & *7
- **Loyalty Accounts** – * accounts that are not Default Cash Customer
- **Customer** – what we normally refer to as, “account number”
- **Validated Return** – a return which is matched up with an invoice
- **Unvalidated Return** – a return which is not matched up with an invoice
- **Return Transaction** – when you process a return @ a POS workstation
- **Invoice** – another word for receipt
- **Invoiced** – another word for billed to
- **Credit** – another word for refund
- **Original Tender** – the type of payment we take from customers @ POS
- **Return Tender** – the type of credits we give customers @ POS

POS Commands

General Explanation of Basic Commands & How POS Responds

The screenshot displays a POS system interface. At the top, there are three input fields: 'Customer' with value '18120' (circled in green with a '1'), 'Job Number' with value '10' (circled in green with a '2'), and 'Sales Rep' with value 'CS' (dropdown arrow visible). To the right of these fields are the names 'Robert Goepel' and 'Robert Goepel/Misc', and 'COREY STEERE'. Below this is a table with columns 'n#', 'Sku', and 'Qty'. A dialog box titled 'Select Return Method' is open, showing 'Please select one.' with three options: 'Return with Receipt' (highlighted), 'Return with Bank Card', and 'Return with No Receipt'. There are 'OK' and 'Cancel' buttons. At the bottom, there are 'Item' and 'Quantity' input fields. 'Item' has value '30990' (circled in green with a '3') and 'Quantity' has value '1' (circled in green with a '4').

1. POS will focus on **Customer** 18120, and 18120 only
2. POS will focus specifically on **Job Number** 10, which is part of **Customer** 18120
 - a. All work done on this document is now tied to this **Customer** and **Job Number**
 - b. Pricing, tax rates, charge allowed, etc. are all controlled by the **Customer & Job Number**
3. POS knows you want to do something with this **Item**, (SKU) 30990
4. POS knows how many of the item(s) you want to do something with
5. POS knows you want to return 1 unit, of SKU 30990, on **Job Number** 10, to **Customer** 18120

Capabilities & General Principles

- Invoices are used to validate returns
- All the information is automatically loaded into the return transaction for you
- The 'rules' for the return transaction are set by the invoice being used to validate the return
 - o This includes customer, job number, item, price, & quantity
- Once an invoice has been used in its entirety, it is no longer available to validate other returns
- The customer & job numbers on the return transaction must match the numbers on the invoice
 - o If they don't match, they can automatically change in the middle of the return transaction

Returns Validation is programmed to support the General Return Rules (Page 1).

Your management team has decided to take responsibility for returns outside the norm

Therefore, a Manager Override Required box will appear when the rules have not been followed

Remember, "item comes back the way it went out."

Return Method

**Options Ordered for Good Reason
Can Be Used to Guide Interaction with Customer**

Return with Receipt – easiest way to validate a return

- transaction will be the same for numbered accounts & * accounts

Return with Bank Card – pulls up the invoices paid for with card

- a tool to help you find the invoice needed to validate the return
- transaction will be the same for numbered accounts & * accounts

Return with No Receipt – customer does not have receipt and item was not purchased with a bank card

- transaction will be different for numbered accounts & * accounts

Return with Receipt

When *Return with Receipt* is the chosen *Return Method*

Do Not Scan, Please Type

If Invoiced After 2-1-19 & Payment Was with Bank Card, Customer Can Receive Credit to Bank Card Even If They Do Not Have the Bank Card with Them During the Return Transaction

***Store* defaults to your location, change when necessary**

The Customer & Job Numbers on The Return Transaction Must Match the Numbers on The Invoice

When the Customer & Job Number from the Return Transaction Do Not Match Those on The Invoice, POS Will React Differently Based on The Type of Customer:

1. Numbered & Loyalty Account Customers - will warn you that you that customer & job number from invoice do not match
2. Default Cash Customer - will automatically change the customer & job number to match numbers from the invoice

Return with Bank Card (1)

When *Return with Bank Card* is the chosen *Return Method*

Card Generates a List of Invoices Paid for with Card, Regardless of Customer & Job Numbers
Will Only Recognize Invoices Dated After 7-7-19

Swipe, Do Not Hand Key

Transactions

Prompt box clearly tells you what it will do once the customer swipes the card
Item being returned may not even be on any of the invoices listed

Return with Bank Card (2)

List of Invoices Paid For With Bank Card

Item Being Returned May Not Even Be on Any of The Invoices Listed

Cust ID / Job	Customer Name	Document	Store	Date	Total
*9/		J23471	1	6/10/19	270.75
*2/		I36080	2	6/10/19	38.40
*2/		I36058	2	6/10/19	25.60
*3/		E99319	3	6/3/19	136.94
*3/		E99318	3	6/3/19	106.24
*3/		E99317	3	6/3/19	23.62

The Customer & Job Numbers on The Return Transaction Must Match the Numbers on The Invoice

When the Customer & Job Number from the Return Transaction Do Not Match Those on The Invoice, POS Will React Differently Based on The Type of Customer:

1. Numbered & Loyalty Account Customers - will warn you that you that customer & job number from invoice do not match
2. Default Cash Customer - will automatically change the customer & job number to match numbers from the invoice

Type of Return

These Impact Quantity on Hand

R Return the item – item comes back, will re-sell, customer gets credit

- QOH goes up

D Return for defective – item comes back, will not re-sell, customer gets credit

- QOH does not change, system assumes you will not try to re-sell defective item

E Exchange for defective – item comes back, will not re-sell, customer gets undamaged item

- QOH goes down because customer takes undamaged item

Required Customer Information

Required for All Default Cash Customer Returns

Typing a Single Character in Each Box Will Allow You to Continue

Please Do Not Do That

Type Accurate Information into Each Box

Return Reason

Defect Description is Required for Both Defective Return Types

Typing a Single Character in The Defect Desc Box Will Allow You to Continue

Please Do Not Do That

Enter Brief Description of Defect

Enter return reason

Reason

R	RETURN
C	CREDIT & REBILL
P	RETURN PICK UP

- Select a reason

OK

Cancel

Enter return reason

Reason

R	RETURN
C	CREDIT & REBILL

- Select a reason

Defect Desc

- Enter up to 160 characters of text. Ctrl-Enter for a new line

RETURN - item comes back to us, customer gets credit

- customer purchasing new item does not impact this, Example Below:
 - o customer gets some 248SP, turns out customer wanted 2410SP
 - we take back the 248SP, customer gets credit
 - what customer does with the credit does not change the fact this is a return

CREDIT & REBILL - item does not come back to us, customer wants paperwork corrected

- usually relating to one or more of the items listed below
 - o customer
 - o job number
 - o price
 - o tax rate
 - o quantity

RETURN PICKUP – when we send our truck to physically pick up the item(s) from a jobsite

**Understanding the Difference Between
RETURN, CREDIT & REBILL & RETURN PICKUP
Is Very Important**

Ask Your Management Team If You Need Help Understanding the Difference

Return with No Receipt

Numbered and Loyalty Account Customers

Return Validation

Items available to return for SKU (248SP) in this store

Doc/Ln#	Date Sold	Qty	UM	Price	UM	Clerk	St	Name
708825/1	2/24/20	10.00	EA	498.00	MF	CS	1	Robert Goepel/Misc
708826/1	2/24/20	100.00	EA	498.00	MF	CS	1	Robert Goepel/Misc
708827/1	2/24/20	10.00	EA	498.00	MF	CS	1	Robert Goepel/Misc
708828/1	2/24/20	54.00	EA	498.00	MF	CS	1	Robert Goepel/Misc

- Select a last price

Type

Code	Type
R	Return the item
D	Return for defective
E	Exchange for defective

- Select a type

Reason

Code	Reason
R	RETURN
C	CREDIT & REBILL
P	RETURN PICK UP

- Select a reason

Defect Desc

Quantity

Doc#

Store

1 rkMILES Manchester

** = Indicates price adjusted for transaction level discount on original transaction.

1. List of invoices, all contain item being returned, with most recent invoice at top
 - a. if return quantity is equal to or less than invoice quantity, select first one

If return quantity exceeds the quantity on the selected invoice, you will have to continue validating with other invoices until the entire return quantity is validated

Example:

customer is returning 25 sticks of 248SP

first invoice will only validate 10 sticks

you will then have to select the second line to validate the remaining 15 sticks

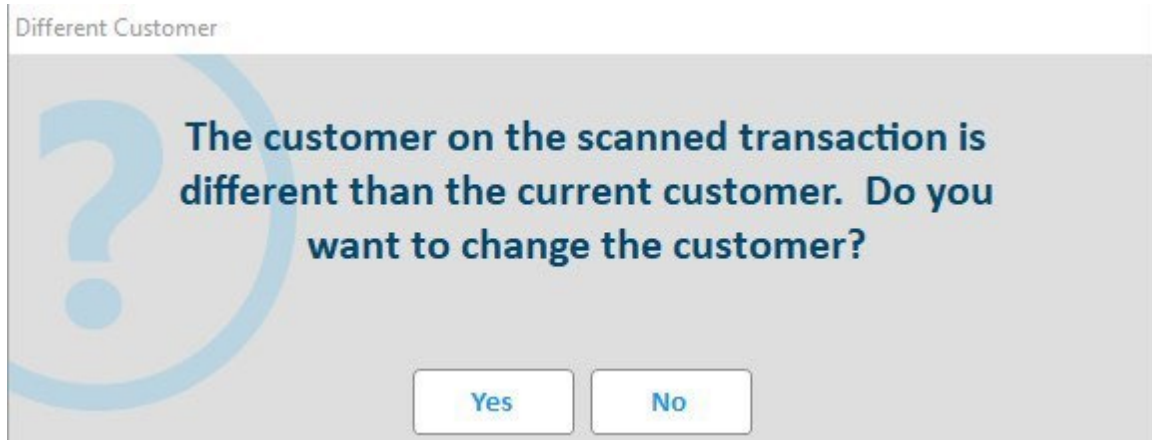
2. Select the **Type**
3. Select the **Reason**
4. If you choose one of the Defective Return Types, type description in **Defect Desc** box

Once you have selected everything, Click **OK**

If you forget to select any of the required items, the system will not let you continue

Different Customer (1)

Customer & Job Number from Invoice Do Not Match Return Transaction



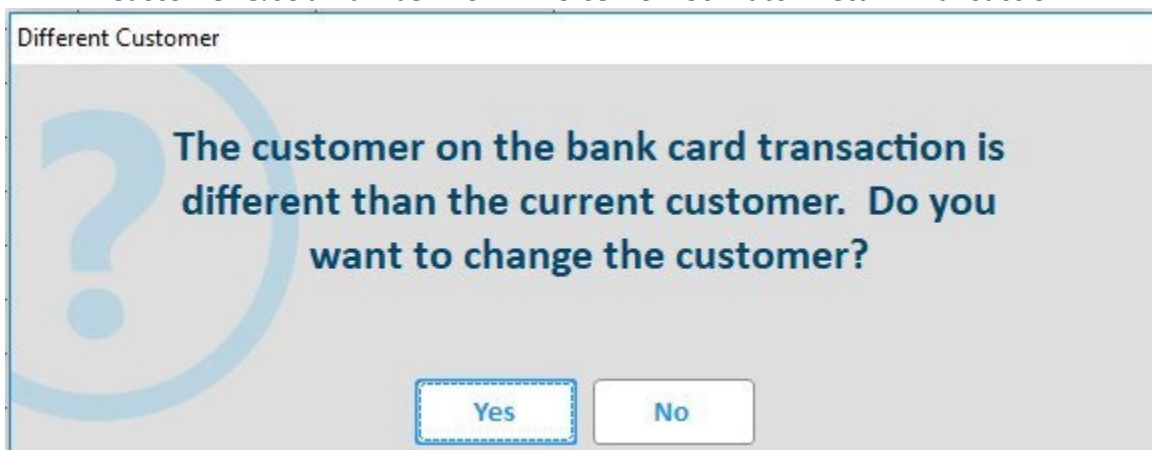
The screenshot shows a dialog box titled "Different Customer". On the left is a large blue question mark icon. The main text reads: "The customer on the scanned transaction is different than the current customer. Do you want to change the customer?". At the bottom are two buttons: "Yes" and "No".

Example:

Return Transaction Customer = 18120
You selected Return with Receipt as the Return Method
Invoice Being Used to Validate Is for Customer = *9

Different Customer (2)

Customer & Job Number from Invoice Do Not Match Return Transaction



The screenshot shows a dialog box titled "Different Customer". On the left is a large blue question mark icon. The main text reads: "The customer on the bank card transaction is different than the current customer. Do you want to change the customer?". At the bottom are two buttons: "Yes" and "No". The "Yes" button is highlighted with a dashed blue border.

Example:

Return Transaction Customer = 18120
You selected Return with Bank Card as the Return Method
Invoice Being Used to Validate Is for Customer = *9

The Customer & Job Numbers on The Return Transaction Must Match the Numbers on The Invoice

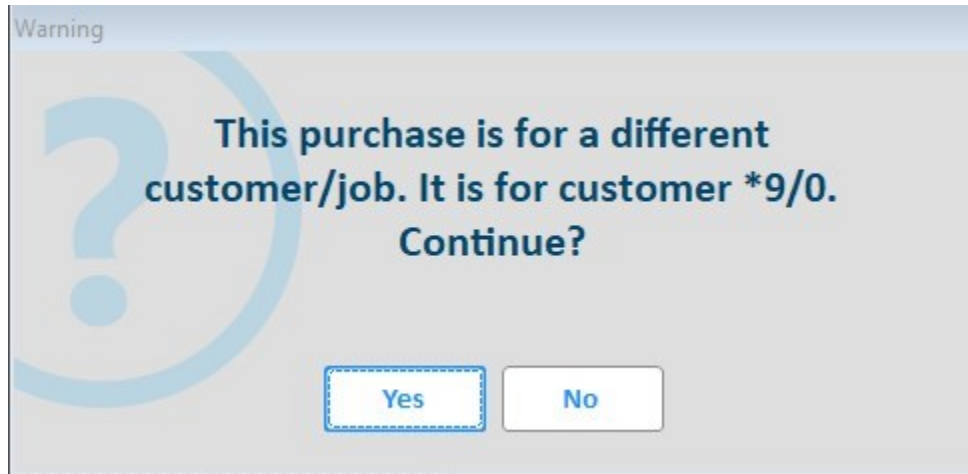
When the Customer & Job Number from the Return Transaction Do Not Match Those on The Invoice, POS Will React Differently Based on The Type of Customer:

1. Numbered & Loyalty Account Customers - will warn you that you that customer & job number from invoice do not match
2. Default Cash Customer - will automatically change the customer & job number to match numbers from the invoice

Validating a Return with Invoice from Different Customer

Warning

**Second & Final Warning When Trying To
Validate a Return with an Invoice from a Different Customer**



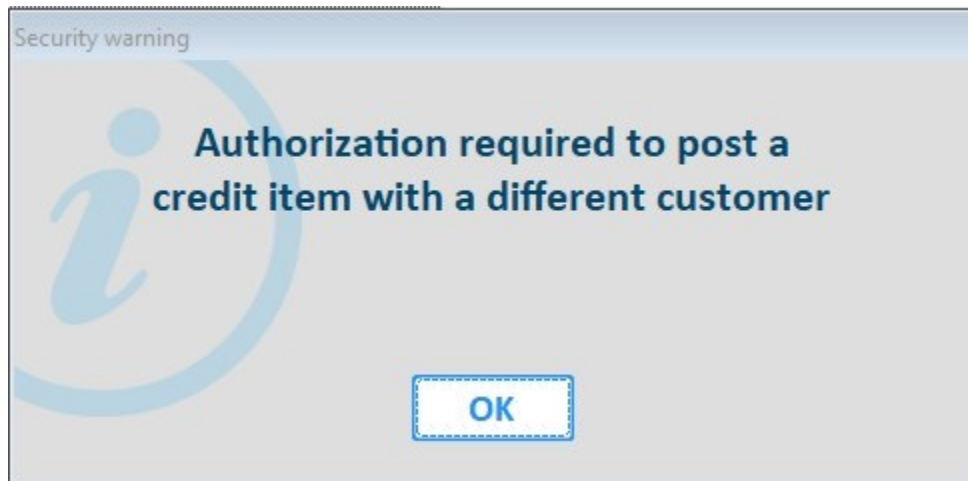
Before you see this box, you will have seen one of the boxes from page 8

If you select **Yes**,

You will need a member from your management team to finalize the return transaction

Security Warning

Validate a Return with an Invoice from a Different Customer



At this point, your only option is to select **OK**

The next box you will see is the

Management Override Required Box

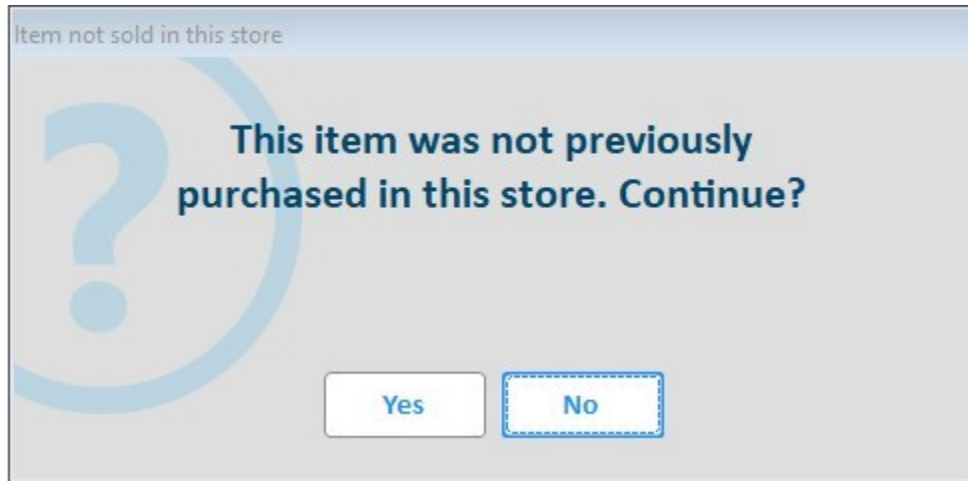
Item Not Sold in This Store

First Warning When Trying To

Validate a Return When There Are No Invoices Available

The Wording in This Box Can Be Confusing

"in this store" really means "by this customer, on this job"

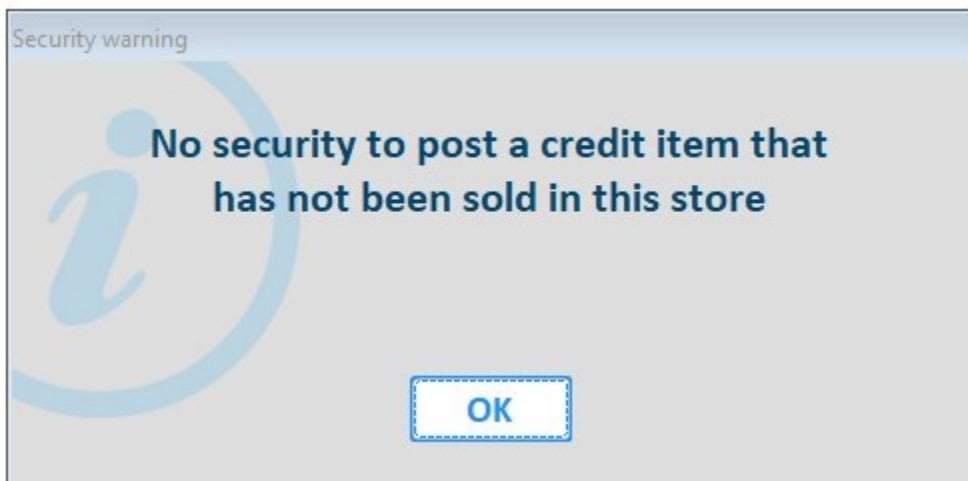


Most of our sales are to contractors who have set up accounts which have specific jobs. Therefore, when the return transaction is for a numbered account customer, and this box appears, you are probably just using the wrong job number.

If you select **Yes**,
You will need a member from your management team to finalize the return transaction.

Security Warning

Validate a Return When There Are No Invoices Available



At this point, your only option is to select **OK**.
The next box you will see is the
Management Override Required Box

Manager Override Required

When Trying To

1. **Validate a Return When There Are No Invoices**
2. **Validate a Return with an Invoice from a Different Customer**
3. **Return Tender Type Does Not Match Original Tender Type**

Manager Override Required

Manager

Password

OK

Cancel

Customer Returns Viewer

From The POS Header Screen

HOME TOOLS

Credit Order Transfer Reprice Display Viewer Q.Recall Misc. Charge Authorization Recall Suspended Add Customer or Job

Customer *9 CASH CUSTOMER MANCHESTER Short ID CASH

Job Number P.O. Number

Then Select

TRANSACTION

- 1 Recall Last Saved Document
- 2 Reprint , View or Fax Invoice
- 3 Enter Charge Authorization
- 4 Enter Document Reference
- 6 Enter Document Notes or Delivery Instructions
- 7 Recall Suspended Transaction

VIEWERS

- 5 Documents
- A Customer Returns
- Q Deposit Activity

This is where all return transaction data is readily available for you to access
Your management team can help answer any questions you may have

Re-Stock SKUs

When the Return Transaction Is for a SO Item and We Choose to Charge a Re-Stock Fee

Currently, we lower the return price to reflect the re-stock fee on the return transaction

Customer	<input type="text" value="18120"/>	Robert Goepel	P.O.	<input style="width: 90%;" type="text"/>
Job Number	<input type="text" value="10"/>	Robert Goepel/Misc		
Sales Rep	<input type="text" value="CS"/>	COREY STEERE		

Ln#	Sku	Description	Qty	U/M	Price	Extension
1	ZZ001947	24" x 36" x 32' WHITE OAK BEAM	1	EA	1,500.00	-1,500.00
2		Orig: 947180/1 06/19/19 TX:				
3	RSFBM	RE-STOCK BUILDING MATERIALS	1	EA	300.00	300.00

New Procedure

7-8-2019

1. Return the item
2. On the same document, charge the customer using one of the re-stock SKUs listed below
 - Hardware – RSFHW
 - Paint – RSFPAIN
 - Decorating – RSFDECO
 - Kitchen & Bath –RSFKB
 - Building Materials – RSFBM
 - Millwork, Door & Window – RSFDW

Manually key the fee being charged to the customer in the price box
 The re-stock SKU will print on the invoice just like every other item currently does