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

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
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

Are you sure you want to leave Epicor Eagle N Series Training Mode?

Please close all other Epicor Eagle N Series applications, if any, before continuing.

Click 'YES' to leave training mode and restart Ebrowser, 'NO' to cancel.

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

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

Header Screen
Also Known as Customer Screen

- 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 ‘ringing up’ the customer:
- 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

- To return to the Posting Screen, click Post (Shift F2) or just press Esc
The 5Menus in POS
POS Has 5 Menus Which Contain Important Functions
The Hotkey For Each Command Is In Blue

**Header Menu**

<table>
<thead>
<tr>
<th>MAINTAIN</th>
<th>TRANSACTION (Continued)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add/Change Customer or Job</td>
<td>Batch Invoicing</td>
</tr>
<tr>
<td>View/Change Customer Codes</td>
<td>Source Order from Transfer</td>
</tr>
<tr>
<td></td>
<td>Multiple Ship To</td>
</tr>
<tr>
<td></td>
<td>Recover 'In Process' Transactions</td>
</tr>
<tr>
<td>MISCELLANEOUS</td>
<td></td>
</tr>
<tr>
<td>eStore Information</td>
<td></td>
</tr>
</tbody>
</table>

**TRANSACTION**

1. Recall Last Saved Document
2. Reprint, View or Fax Invoice
3. Enter Charge Authorization
4. Enter Document Reference
5. Enter Document Notes or Delivery Instructions
6. Recall Suspended Transaction
7. Create Transfer Adjustment
8. 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

<table>
<thead>
<tr>
<th>ACTIVITY</th>
<th>TRANSACTION (Continued)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open Cash Drawer</td>
<td>Enter Paid In</td>
</tr>
<tr>
<td>Display Cash Drawer</td>
<td>Recall Suspended Transactions</td>
</tr>
<tr>
<td>Print Totals and Close Cash Drawer</td>
<td>Gift Card Maintenance</td>
</tr>
<tr>
<td></td>
<td>Enter Loyalty #: View Loyalty Summary</td>
</tr>
<tr>
<td></td>
<td>Return With Receipt/Credit Card</td>
</tr>
<tr>
<td></td>
<td>Reverse Transaction</td>
</tr>
<tr>
<td></td>
<td>Recover 'In Process' Transactions</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>MISCELLANEOUS</td>
<td></td>
</tr>
<tr>
<td>Test Form Alignment</td>
<td></td>
</tr>
<tr>
<td>Open/Close Customer Display</td>
<td></td>
</tr>
<tr>
<td>Enter Training</td>
<td></td>
</tr>
<tr>
<td>Print Gift Receipt</td>
<td></td>
</tr>
<tr>
<td>Import Third Party Transaction File</td>
<td></td>
</tr>
<tr>
<td>Paste Document</td>
<td></td>
</tr>
</tbody>
</table>

**TRANSACTION**

1. Reprint, View or Fax Invoice
2. Cash a Check
3. Create Raincheck
4. 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)

<table>
<thead>
<tr>
<th>DISPLAY</th>
<th>MAINTAIN (Continued)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Tally 2 Components</td>
</tr>
<tr>
<td>2</td>
<td>Item Costs</td>
</tr>
<tr>
<td>3</td>
<td>5 Prior Selling Prices</td>
</tr>
<tr>
<td>4</td>
<td>Source Item Menu</td>
</tr>
<tr>
<td>5</td>
<td>All Occurrences of SKU</td>
</tr>
<tr>
<td>6</td>
<td>Alternates</td>
</tr>
<tr>
<td></td>
<td>Price at 'N for $X', Example 3 for $1</td>
</tr>
<tr>
<td></td>
<td>Validate Return Items</td>
</tr>
<tr>
<td>TRANSACTION</td>
<td>VIEWERS</td>
</tr>
<tr>
<td></td>
<td>N</td>
</tr>
<tr>
<td></td>
<td>Open Orders</td>
</tr>
<tr>
<td></td>
<td>P</td>
</tr>
<tr>
<td></td>
<td>Purchase Orders</td>
</tr>
<tr>
<td></td>
<td>C</td>
</tr>
<tr>
<td></td>
<td>Item Purchase History</td>
</tr>
</tbody>
</table>

- 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

<table>
<thead>
<tr>
<th>DISPLAY</th>
<th>TRANSACTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Total Weight</td>
</tr>
<tr>
<td>2</td>
<td>Lumber Totals</td>
</tr>
<tr>
<td>3</td>
<td>Tally 2's Without Components Posted</td>
</tr>
<tr>
<td>4</td>
<td>Dynamic Promotions Pricing</td>
</tr>
<tr>
<td>5</td>
<td>Backorder Subtotal</td>
</tr>
<tr>
<td>6</td>
<td>Find Items Without Serial # Assignment</td>
</tr>
<tr>
<td>7</td>
<td>All Occurrences of SKU</td>
</tr>
<tr>
<td></td>
<td>Partially Invoice Order</td>
</tr>
<tr>
<td></td>
<td>Enter Customer Information</td>
</tr>
<tr>
<td></td>
<td>Enter Loyalty #/View Loyalty Summary</td>
</tr>
<tr>
<td></td>
<td>Return With Receipt/Credit Card</td>
</tr>
<tr>
<td>MAINTAIN</td>
<td>VIEWERS</td>
</tr>
<tr>
<td></td>
<td>Go to Line</td>
</tr>
<tr>
<td></td>
<td>Insert a Line</td>
</tr>
<tr>
<td></td>
<td>Insert Group Subtotal</td>
</tr>
<tr>
<td></td>
<td>Calculate and Show Range Subtotal</td>
</tr>
<tr>
<td></td>
<td>Change Bill of Materials</td>
</tr>
<tr>
<td></td>
<td>D</td>
</tr>
<tr>
<td></td>
<td>Open Orders</td>
</tr>
<tr>
<td></td>
<td>P</td>
</tr>
<tr>
<td></td>
<td>Purchase Orders</td>
</tr>
<tr>
<td></td>
<td>C</td>
</tr>
<tr>
<td></td>
<td>Item Purchase History</td>
</tr>
<tr>
<td></td>
<td>V</td>
</tr>
<tr>
<td></td>
<td>Archived Documents</td>
</tr>
</tbody>
</table>

- 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

<table>
<thead>
<tr>
<th>DISPLAY</th>
<th>TRANSACTION (Continued)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Dynamic Promotions Pricing</td>
</tr>
<tr>
<td></td>
<td>Fax This Document</td>
</tr>
<tr>
<td></td>
<td>e-Mail This Document</td>
</tr>
<tr>
<td></td>
<td>Exchange Foreign Currency</td>
</tr>
<tr>
<td></td>
<td>Print Labels</td>
</tr>
<tr>
<td></td>
<td>View Loyalty Summary</td>
</tr>
<tr>
<td></td>
<td>Allow swipe of chip card</td>
</tr>
<tr>
<td></td>
<td>Enter Dated Billing</td>
</tr>
<tr>
<td></td>
<td>Net Credit Authorization</td>
</tr>
<tr>
<td></td>
<td>Change Print Sequence</td>
</tr>
<tr>
<td></td>
<td>Enter Customer Information</td>
</tr>
<tr>
<td></td>
<td>Change Date or Invoice Number</td>
</tr>
<tr>
<td></td>
<td>Select Credit Card</td>
</tr>
<tr>
<td></td>
<td>Append Special Order Items to PO</td>
</tr>
<tr>
<td></td>
<td>Post Freight</td>
</tr>
<tr>
<td></td>
<td>Require Signature</td>
</tr>
<tr>
<td></td>
<td>Ship Via</td>
</tr>
<tr>
<td></td>
<td>Accept Deposit</td>
</tr>
<tr>
<td></td>
<td>Allow manual card entry on PIN pad</td>
</tr>
</tbody>
</table>

- 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

<table>
<thead>
<tr>
<th>Date</th>
<th>St</th>
<th>Doc #</th>
<th>Type</th>
<th>Cust #</th>
<th>Job</th>
<th>Customer Name</th>
<th>Short ID</th>
<th>SKU</th>
<th>Deposit</th>
<th>Total</th>
<th>Exp Dvry</th>
</tr>
</thead>
<tbody>
<tr>
<td>2/16/20</td>
<td>1</td>
<td>157282</td>
<td>Order</td>
<td>*9</td>
<td>TXR MANCHE</td>
<td>6102975995</td>
<td>284.99</td>
<td>284.99</td>
<td>2/16/20</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2/16/20</td>
<td>1</td>
<td>156828</td>
<td>Order</td>
<td>*9</td>
<td>AMEE BRIAME</td>
<td>6102975995</td>
<td>284.99</td>
<td>284.99</td>
<td>2/19/20</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2/15/20</td>
<td>1</td>
<td>157109</td>
<td>Sp Order</td>
<td>*9</td>
<td>ASHLEY LEWIS</td>
<td>LEWIS</td>
<td>1,612.90</td>
<td>1,612.90</td>
<td>12/25/20</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2/15/20</td>
<td>1</td>
<td>156966</td>
<td>Estimate</td>
<td>*9</td>
<td>CASH CUSTOM</td>
<td>CASH</td>
<td>0.00</td>
<td>471.80</td>
<td>3/16/20</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- 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**

- 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

- 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

- 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

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

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

- **Enter**, since you selected **No** (pic C) **Total Due** will automatically populate in **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
- **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 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 Enter
- 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

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td><strong>Customer:</strong> Enter account number, or type customer / business name to find account number</td>
</tr>
<tr>
<td>2.</td>
<td><strong>Job Number:</strong> Type job number if applicable</td>
</tr>
<tr>
<td>3.</td>
<td><strong>Order:</strong> Click <strong>Order (F8)</strong></td>
</tr>
<tr>
<td>4.</td>
<td><strong>Short ID:</strong> If the customer does not have an account, enter the customer’s last name. <strong>Do not skip this step – Short ID is important when searching for a customer’s open order or past invoice</strong></td>
</tr>
<tr>
<td>5.</td>
<td><strong>P.O. Number:</strong> For a customer’s P.O. and/or reference</td>
</tr>
<tr>
<td>6.</td>
<td><strong>Phone:</strong> Include area code. Type phone number without any spaces or dashes.</td>
</tr>
<tr>
<td>7.</td>
<td><strong>Ref:</strong> General description of item(s) on the document. Not always necessary, but helpful</td>
</tr>
<tr>
<td>8.</td>
<td><strong>Ship To:</strong> Customer’s full name or a job name</td>
</tr>
</tbody>
</table>
| 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

4. Item Posting Area
   a. cursor defaults to Item field
   b. type SKU or scan UPC
   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 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

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

Order # 156867 has been saved

Click OK (Enter)

Step 6: Select Invoice Printer Screen

Choose an invoice printer.

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

1. Customer’s full name or a job name
2. The official 911 street address: No apt #, descriptions, etc.
3. Any applicable apartment number, description, etc. or for you to make a note of some type
4. Town and State. Zip code can be entered, but not necessary
5. Use drop down box to select correct tax code
6. Use drop down to select the delivery date
   a. All Special Orders shall be scheduled on December 25\textsuperscript{th} 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 25\textsuperscript{th}.
   b. If the customer wants to pick up their item(s) set the Delivery date to January 1\textsuperscript{st} 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 1\textsuperscript{st} of the following year for customer pickups, allows the dispatcher to easily search and manage the process.

7. **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 they 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

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

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

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


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 Vendor #, 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

Your PO# 2924001 for Vendor 480 has been added/reserved.

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

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

Step 5: The ZZ SKU Has Been Created

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

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

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

Step 8: Document Has Been Created

Special order # 156864 has been saved

Click OK (Enter)

Step 9: Select Invoice Printer Screen

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
  - continue to follow the exceptions your management team allows
- When a credit is given, it needs to match the original tender type
  - invoiced to customer 123456 job 5, credit is to customer 123456 job 5
  - invoiced to CC ending in 5432, credit is to CC ending in 5432
  - your management team will have the ability to deal with exceptions

Key Definitions
- Numbered Accounts – all accounts which begin with a number
- 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

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

<table>
<thead>
<tr>
<th>Select Return Method</th>
</tr>
</thead>
<tbody>
<tr>
<td>Please select one.</td>
</tr>
<tr>
<td>OK</td>
</tr>
<tr>
<td>Cancel</td>
</tr>
</tbody>
</table>

**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

![Image of card payment interface]

*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*

![Image of invoice list]

**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 the 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

<table>
<thead>
<tr>
<th>*Name</th>
<th></th>
<th>OK</th>
</tr>
</thead>
<tbody>
<tr>
<td>*Phone Number</td>
<td></td>
<td>Total</td>
</tr>
</tbody>
</table>

Note: * indicates a required field.
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

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
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

<table>
<thead>
<tr>
<th>The customer on the scanned transaction is different than the current customer. Do you want to change the customer?</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Yes] ![No]</td>
</tr>
</tbody>
</table>

**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

<table>
<thead>
<tr>
<th>The customer on the bank card transaction is different than the current customer. Do you want to change the customer?</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Yes] ![No]</td>
</tr>
</tbody>
</table>

**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

This purchase is for a different customer/job. It is for customer *9/0. Continue?

Yes  No

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

Authorization required to post a credit item with a different customer

OK

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
Customer Returns Viewer
From The POS Header Screen

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

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 – RSFPAINT
   - 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