



**HARBORTOUCH**

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# HARBORTOUCH RETAIL USER GUIDE

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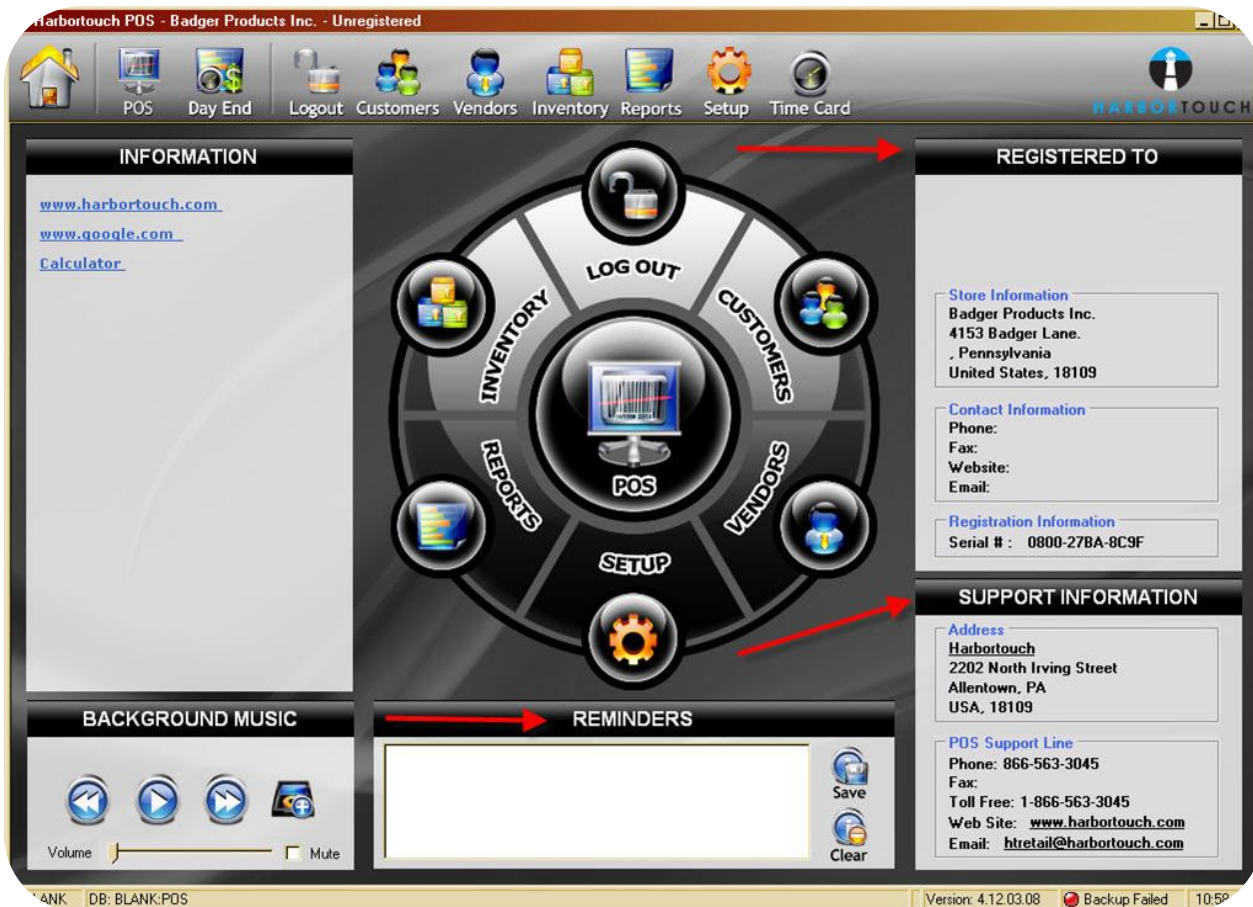
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# HOME SCREEN

To access your point of sale system, double click the POS icon located on your computer's desktop.

Once, the system has fully loaded you will arrive at the initial start up screen. This is the main menu or home screen of your point of sale system. From here you can navigate to anywhere within the system by selecting any of the multiple icons that are displayed.

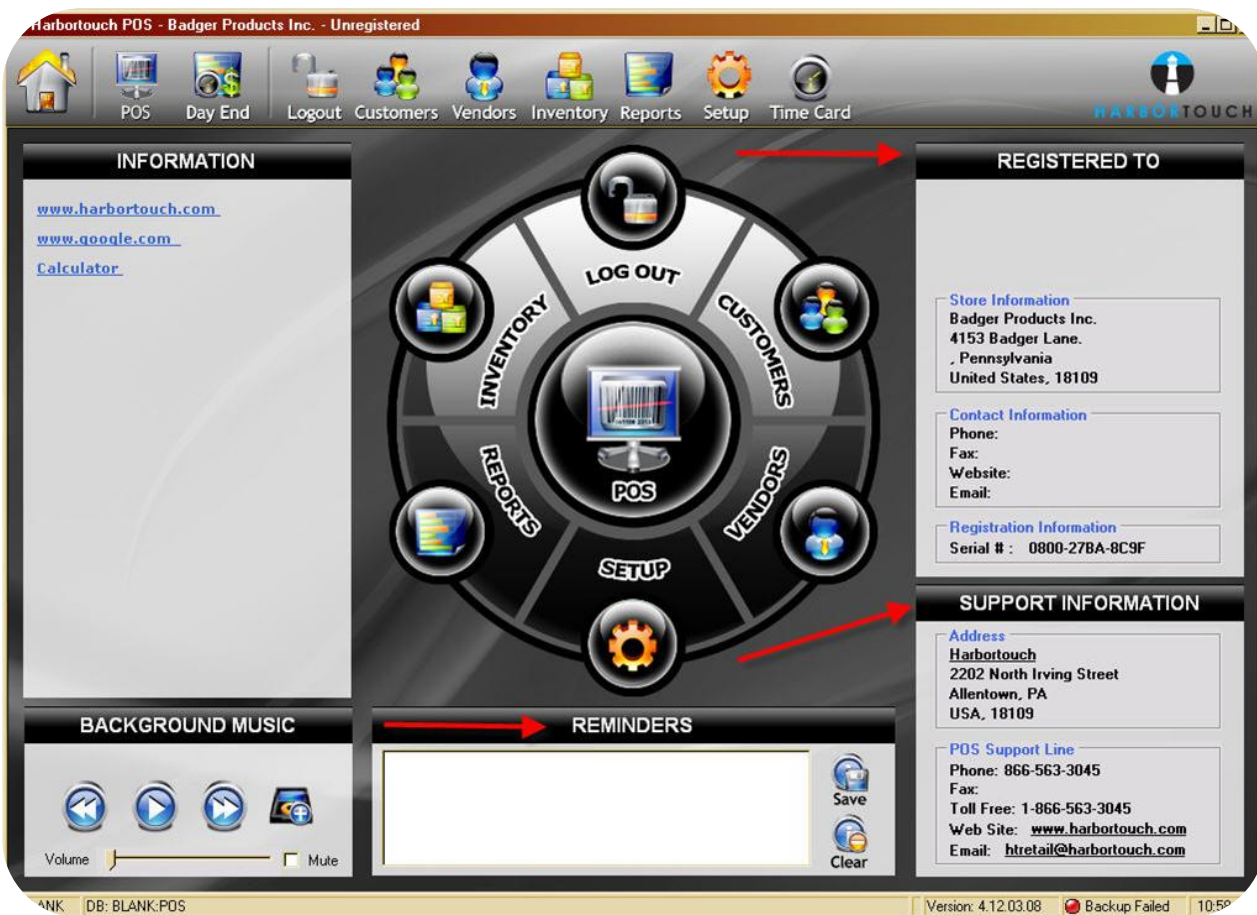


# MAIN MENU

On the far right side of the screen you will view your store's Registration Information within the box labeled **REGISTERED TO**. Within this box, your Store Information, Contact Information and your store image (if supplied) will also be displayed.

Located beneath this box will be a box labeled **SUPPORT INFORMATION** which will contain Harbor-touch's address as well as the POS support information.

In the middle of the bottom of the screen, you will see a **REMINDERS** field. Within this field you can key in a reminder, then select the **SAVE** button to save it. To clear a reminder from the field, select the **CLEAR** button.



# MAIN MENU

## HOME SCREEN ICONS

You will see multiple icons displayed on the home screen of your point of sale system. Each icon will navigate to a different area within your system.

The Main Menu bar is located at the top of the screen. Here you will see icons for Home, POS, Day End, Logout, Customers, Vendors, Inventory, Reports, Setup, and Time Card.



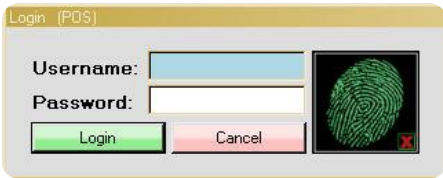
A drop down window will be displayed when you mouse over some of these options. From the dropdown menu, you can select where you would like to go.



# MAIN MENU

## LOGGING INTO POINT OF SALE

1. To login to your point of sale system select the **LOGIN** button located on the screen. Upon selecting this icon, a login window will be displayed.
2. You will then be prompted to key in your username and password. Once you have finished, select the **LOGIN** button located on the bottom left corner of this window.



3. Upon logging in, the surrounding icons will become enabled. The login icon will also change to **LOGOUT**. If you would like to logout of the point of sale system, select this icon. You will then be prompted to confirm logging out. Select **YES** to continue. The surrounding icons will then become disabled.



LOGGED OUT



LOGGED IN

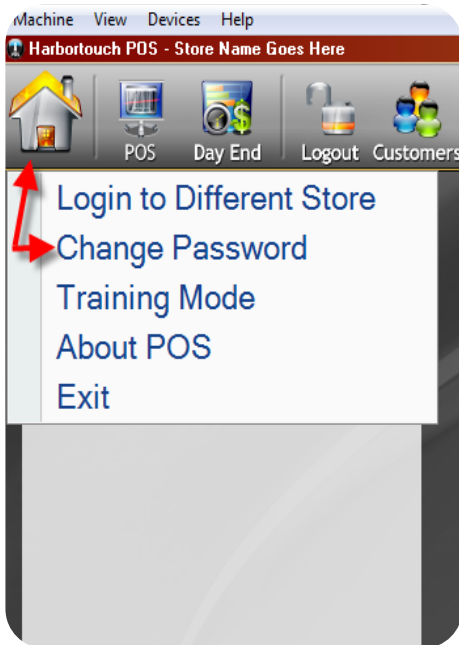
**NOTE:** Logging into the POS does not clock you in for a scheduled shift. To access the POS you will need to clock in. Please see time card for clocking in.



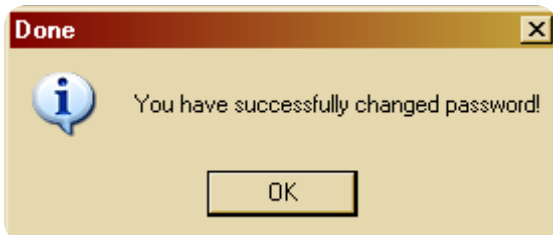
# MAIN MENU

## CHANGING YOUR PASSWORD

To change your password, select the Home option located on the grey strip at the top of the home screen. Upon selecting this option, a drop down menu will be displayed. From here you will select the second option: Change Password.



1. Upon selecting this option, a window will be displayed; here you will be required to key in your old and new information to change your password. First, key in your username and old password into the first two fields displayed. Next you will key in your new password and confirm it.
2. When you have finished, select the **CHANGE** button. A confirmation will then be displayed stating that you have successfully changed your password. Select **OK** to continue.



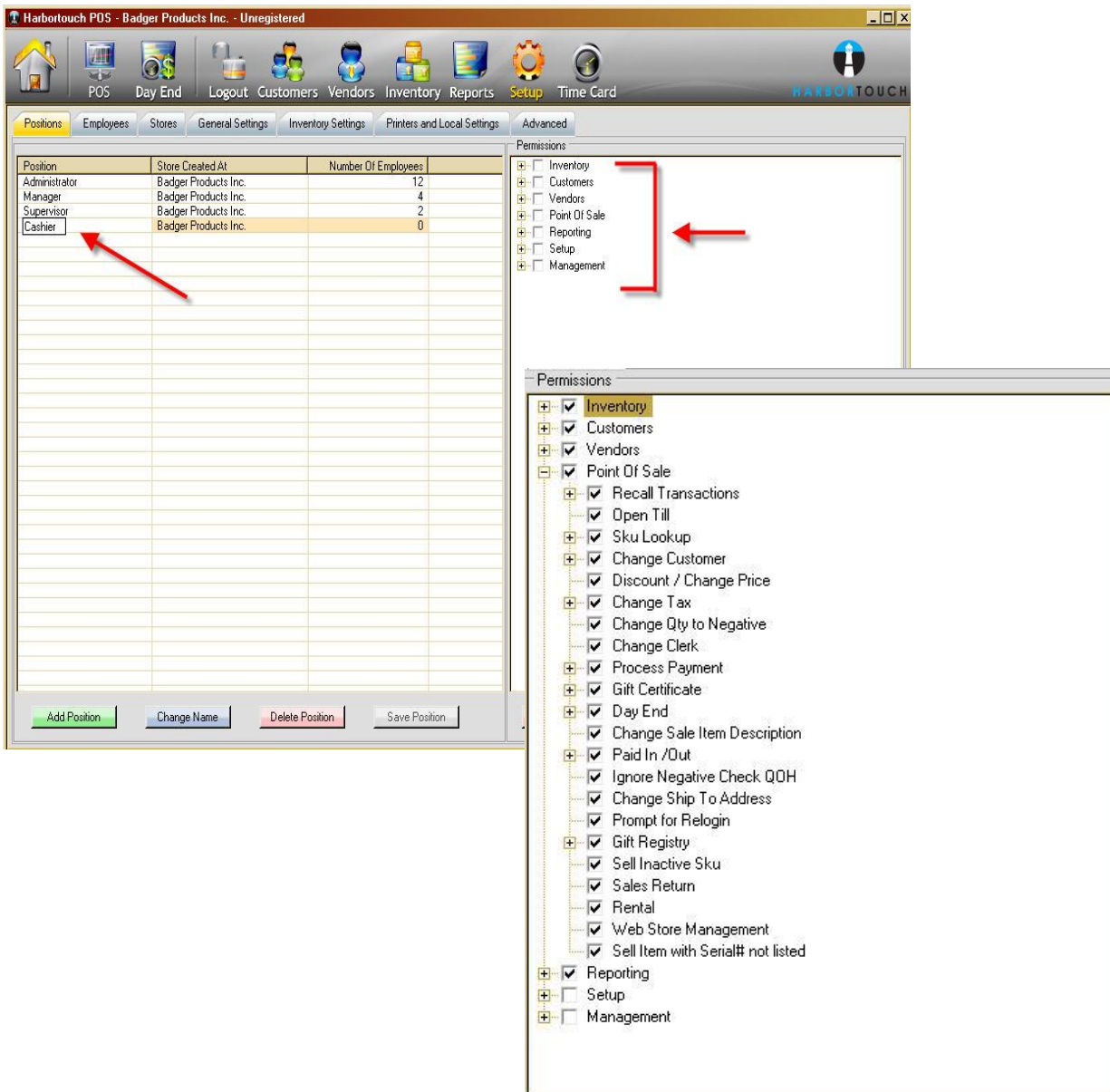




# MAIN MENU

## ADDING JOB POSITIONS (continued)

4. To add a new job position, click on **ADD POSITION** and type the name of the new position.  
*Example: Cashier*
5. Permission levels can be adjusted on the right hand side of the screen.
6. Once you are finished with setting positions press **SAVE POSITION** located on the bottom of the screen.



# MAIN MENU

## ADDING A NEW EMPLOYEE

1. To add a new employee, begin by clicking on **SETUP** followed by the **EMPLOYEES** tab.
2. Click on **NEW EMPLOYEE**.
3. Fill out the information for the new employee. You can assign the new employee a job position in the POSITION drop down menu. Once you are finished, press **SAVE**.

The screenshot shows a web form titled "Add New Employee" with several sections:

- Personal Information:** Fields for First Name, Last Name, Phone, Mobile, and Email.
- Home Address:** Fields for Address, City, Postal/Zip, Province/Stat (dropdown), and Country (dropdown).
- Picture:** A placeholder box with "Clear" and "Browse ..." buttons.
- Login Information:** Fields for Username, Password, and Confirm. A dropdown menu for Position is set to "Administrator". Below this is a "FingerPrint Enrollment" section with "Enrolled: NO", "Reset", and "Enroll" buttons.
- Multiple Store Access:** A table with a checkbox for "Badger Products Inc." and a "Select All Stores" checkbox at the bottom.
- Employee Active:** A checked checkbox.
- Buttons:** "Clear" (red) and "Save" (green) buttons.
- Attributes:** A large empty box on the right side.

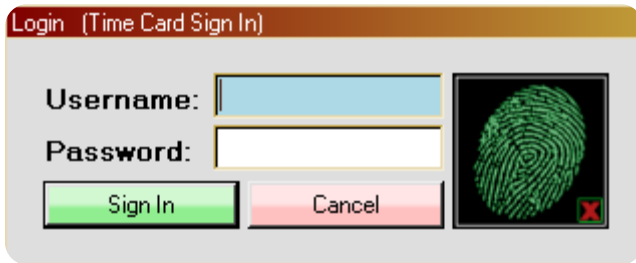
Red arrows in the image point to the "Login Information" section, specifically to the Username, Password, and Position fields.

# TIME CARD

## SIGNING IN AND OUT

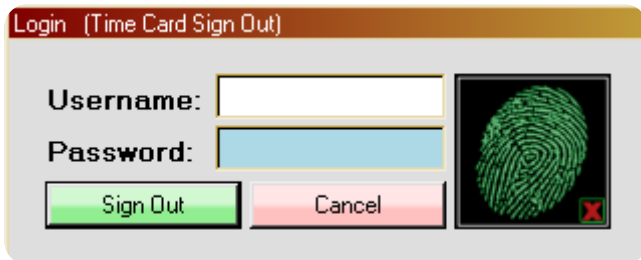
To keep track of your employee's hours, you can have them sign in at the beginning of the day and sign out at the end of the day.

1. To **"SIGN IN"**, hover over the **TIME CARD** button at the top of the POS screen and click on **TIME CARD SIGN IN**. Upon selecting this button you will be prompted to key in your username and password in the **"LOGIN (TIMECARD SIGN IN)"** window.



2. After you enter your information select the green **"SIGN IN"** button.
3. To sign out, hover over the **TIME CARD** button at the top of the POS screen and click on **Time Card Sign Out**.

You will then be prompted to enter your username and password into the **LOGIN (TIME CARD SIGN OUT)** window. Once you have keyed in your username and password select the green **SIGN OUT** button.



**Note:** The sign in button can be accessed whether or not someone is logged into the system.

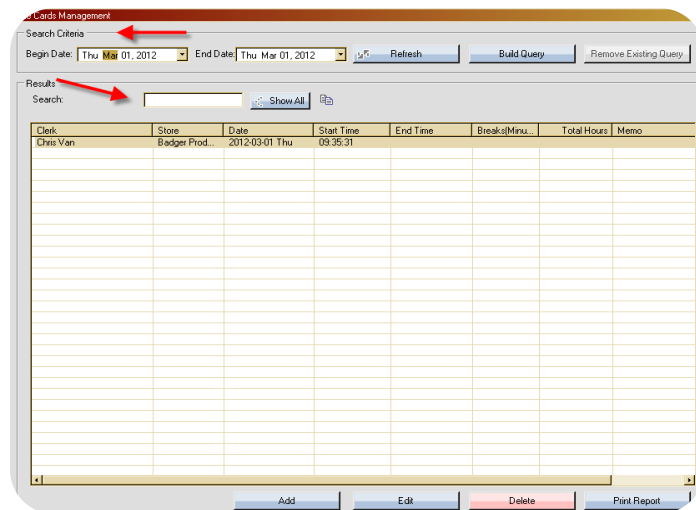
# TIME CARD

## VIEWING TIME CARDS

To view your time cards, select the **TIME CARD** button located on the gray strip at the top of the point of sale screen (you must be logged in to access this). Upon selecting this option, a **TIME CARDS MANAGEMENT** window will be revealed.

You may also hover over Time Card, this will display a drop down menu, from this menu select **TIME CARD REPORT**. Upon selecting this option, a **TIME CARDS MANAGEMENT** window will be revealed. Here you will view, add, and edit your employee's time cards.

1. At the top of this window you will see the **SEARCH CRITERIA** box.
2. From the **BEGIN DATE** and **END DATE** fields, select the dates that you would like to view your employee's time cards for.
3. Once you have selected the dates, select the blue **REFRESH** button. This will load up a new list displaying the employees containing time cards between the selected dates.



4. If you wish, you can also build a query to view a preferred employee or store. To do so select the blue **BUILD QUERY** button.
5. To remove an already existing query select the red **REMOVE EXISTING QUERY** button beneath the build query button (the remove existing query button will only be enabled if there is an already existing query).
6. To delete an employee's time card, first select the time card you wish to delete. This will then activate the red **DELETE** button which you will select at the bottom of the screen. Upon selecting this button, a confirmation will be displayed stating that the timecard was successfully removed from the database. Select **OK** to continue.

# TIME CARD

## ADDING AN EMPLOYEE TIME CARD

To add an employee time card select the blue **ADD** button situated at the bottom of the *Time Card Management* window.

*You must select an employee from the list in order to enable this function.*

1. Upon selecting this button, an **ADD TIME CARD** window will be displayed.
2. At the top of this window select the **CLERK** field to reveal a drop down menu. Here you will select a clerk from your store.
3. Next you will then select *Start* and *End Times* from the date and time fields.
4. Once you have entered your information, select the green **"ADD"** button.

The screenshot shows a dialog box titled "Add Time Card" with the following fields and controls:

- Clerk:** A dropdown menu showing "Kate Harel".
- Start Time:** Two dropdown menus for date and time, showing "03/01/2012" and "09:35 AM".
- End Time:** Two dropdown menus for date and time, showing "03/01/2012" and "09:35 AM".
- Break Time:** A dropdown menu showing "0" and the label "Minutes".
- Memo:** A text input field.
- Buttons:** A green "Add" button and a red "Cancel" button.

# TIME CARD

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## EDIT AN EMPLOYEE TIME CARD

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To edit an employee's time card, first select the employee time card you would like to edit. This will then enable the blue **EDIT** button located at the bottom of the screen. Select the **EDIT** button to edit the employee's time card.

1. Upon selecting this button an **EDIT TIME CARD** window will be displayed.
2. Below the clerk's name, you will see the *Start* and *End Times*. You can edit these by selecting new times and dates as needed from the fields.
3. Once you have made your edits select the green **UPDATE** button to update the employee's time card.

The screenshot shows a dialog box titled "Edit Time Card" with a close button (X) in the top right corner. The dialog contains the following elements:

- Clerk:** Kate Harel
- Start Time:** 03/01/2012 09:35 AM (with date and time dropdown arrows)
- End Time:** 03/01/2012 09:35 AM (with date and time dropdown arrows)
- Break Time:** 0 Minutes (with a numeric dropdown arrow)
- Memo:** A text area with a light blue background and a scroll bar.
- Buttons:** A green "Update" button and a red "Cancel" button at the bottom.



# CHAPTER ONE – POINT OF SALE

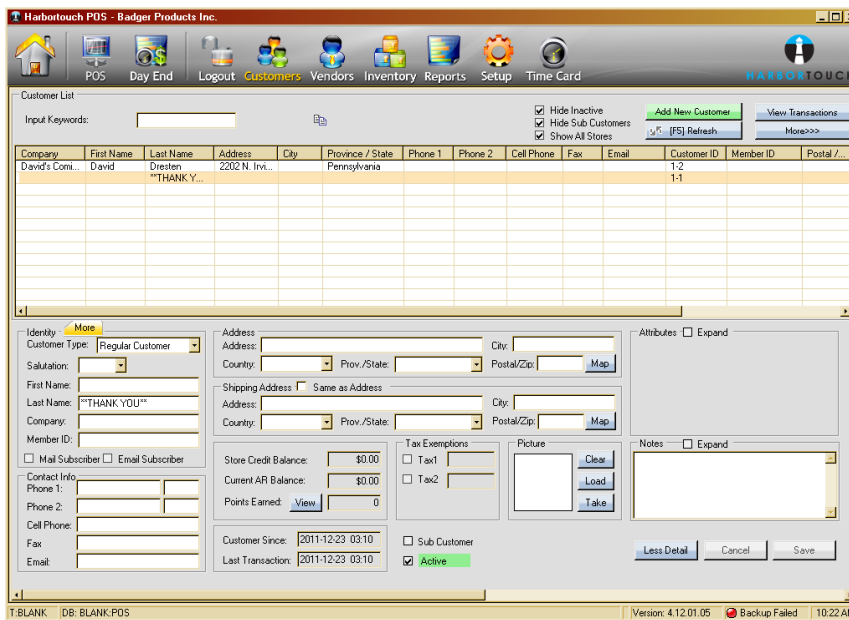
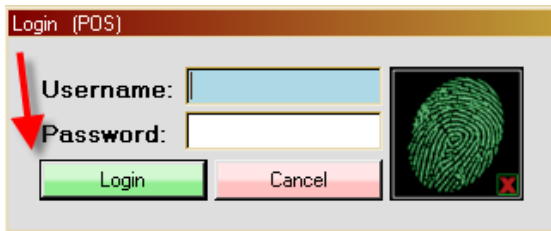
## POINT OF SALE NAVIGATION KEYS

	<b>Home Screen (Main Screen)</b>	Click here to return to the “HOME” screen. This is the initial screen when point of sale is loaded. From here you can navigate to anywhere in the program.
	<b>Point of Sale Screen</b>	Click here to advance to the “POINT OF SALE” screen. This is where you will enter in sales for the store.
	<b>Day End</b>	Click here to advance to the “DAY END” screen.
	<b>Log In from Point of Sale</b>	Click here to log in to the “POINT OF SALE” system. <i>*Both Logout and Login are for Back office/Admin Role.</i>
	<b>Log Out from Point of Sale</b>	Click here to log out of the “PONT OF SALE” system. <i>*Both Logout and Login are for Back office/Admin Role.</i>
	<b>Customers</b>	Click here to advance the “Customers” screen. Here you can edit, add or change customers. You can also view transactions and export mailing lists.
	<b>Vendors</b>	Click here to advance to the “Vendors” screen. Here you can view, create and edit vendors within your store.
	<b>Inventory</b>	Click here to advance to the “Inventory” screen. Here you will setup SKUs, create purchase orders, do an inventory count and also do transfers.
	<b>Reports</b>	Click here to advance to the “Reporting” screen. This is where you can print out reports. Such as a best sales list, gross profit, transaction details and so on.
	<b>Setup</b>	Click here to log in to the “PONT OF SALE” system
	<b>Time Card</b>	Click here to “SIGN IN” or “SIGN OUT”. This will sign the current employee in or out and keep track of their hours for current.

# CHAPTER ONE – POINT OF SALE

## POINT OF SALE

1. Open POS and select the middle icon labeled **POINT OF SALE**, from the home screen.
2. Upon selecting this option you will immediately be prompted to login by username and password. Once you have keyed in the required information, select the green **LOGIN** button.



You will then arrive at the *Customers* screen where you will select a customer. If you need to **ADD** a customer, select the green **ADD A NEW CUSTOMER** button. If no customer selection is needed, then use the default customer marked as "Thank You".

# CHAPTER ONE – POINT OF SALE

## POINT OF SALE (continued)

Upon selecting a customer you will arrive at the Point of Sale Transactions screen. Here you can create and recall transactions, lookup sku's, change taxes, apply discounts, perform returns and more.

This screen will display the following: Customer Information, Customer Accounts, Transaction Totals, Enter Sku, Clerk and Cashier, Transaction Details, and Setup Quick Launch.

The screenshot displays the Harbortouch POS interface for Badger Products Inc. The window title is "Harbortouch POS - Badger Products Inc. - Unregistered". The interface is divided into several sections:

- Customer Information:**
  - Customer: David's Comic Shop
  - David Dresten
  - 1210 Carriage Lane
  - Kingston, Pennsylvania
  - 18704 United States
- Customer Account:**
  - Store Credit: \$0.00
  - A/R Balance: \$0.00
  - A/R Limit: \$0.00
  - Points: 0
- Transaction Totals:**
  - Reg. Price: \$20.64
  - Discount: \$0.00
  - Subtotal: \$20.64
  - Tax1: \$2.48
  - Tax2: \$0.00
  - Total: \$23.12
- Transaction Details:**
  - Print Receipt:  Print Gift Receipt:
  - Total Items: 4
  - [ESC] Logout Cashier

Code	Description	Clerk	Qty	Unit	Price	Ext Price	T...	T...
02657512	Newport Box	Chris	1		\$5.75	\$5.75	x	
02657512	Newport Box	Chris	1		\$5.75	\$5.75	x	
611269133448	20 oz. Red Bull	Chris	1		\$4.57	\$4.57	x	
611269133448	20 oz. Red Bull	Chris	1		\$4.57	\$4.57	x	
- Quick Launch Menu:**
  - Shift-F12 Gift Card / Certificate
  - Shift-F11 Clear Out All Items
  - Shift-F10 Change Description
  - Shift-F9 Paid In /Out
  - Shift-F8 Insert Blank Line
  - Shift-F7 Change Ship To Address
  - Shift-F6 Rental / Reservation
  - Shift-F5 Gift Registry
  - Shift-F4 Sales Return
  - Shift-F3 Transaction Item Attributes
- Footer:**
  - T:BLANK DB: BLANK:POS
  - Version: 4.12.03.08 Backup Failed 2:24 PM

# CHAPTER ONE – POINT OF SALE

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## CUSTOMER INFORMATION

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1. In the top left corner of the Point Of Sale screen will be a box labeled **"CUSTOMER"**. This box will display the customer's basic information.



The image shows a screenshot of a customer information box. The box is titled "Customer" and contains the following information:

David's Comic Shop	
David Dresten	
1210 Carriage Lane	
Kingston, Pennsylvania	
18704	United States

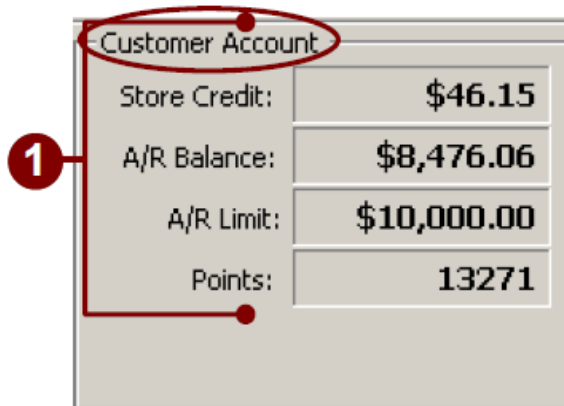
***This information will include the Company Name (that the customer works for), the Customer's Name, their Address and Phone Number.***

2. In addition, when you mouse over the customer's information, any previous notes that have been written about the customer will also be displayed. These notes can be added on the customer screen.

# CHAPTER ONE – POINT OF SALE

## CUSTOMER ACCOUNT

1. The next box over will be labeled **"CUSTOMER ACCOUNT"**. Here you will see the customer's account information. These fields will be automatically updated.
  - These fields will display the customer's current *Store Credit*, *A/R Balance*, *A/R Limit* and *Points*. If a limit was created for your customers A/R balance it will be shown in the A/R Limit field. This is done on the customer's window
  - If you have assigned points to certain items, accumulated points will be shown in the Points field. These points can be set up in the Inventory section of POS under the Sku's tab.



# CHAPTER ONE – POINT OF SALE

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## TRANSACTION TOTALS

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The last box on the top right side of the transaction screen will display the totals of the current transaction. There will be seven fields that are automatically updated.

These fields will display the *Total Items*, the *Subtotal*, *Discount*, any extra cost that you have setup and the overall *Total* of the transaction.

- Any discounts that have been applied to the transaction will be shown in the *Discount* field. This field will display the overall amount that was deducted from the price.
- If you have applied your own tax or extra cost it will be shown in the sixth field along with the name. You can create this tax in the Setup section of POS under Stores in the Taxes box.

Reg. Price:	\$20.64
Discount:	\$0.00
Subtotal:	\$20.64
Tax1:	\$2.48
Tax2:	\$0.00
:	\$0.00
<b>Total:</b>	<b>\$23.12</b>

## CHAPTER ONE – POINT OF SALE

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### SKU, CLERK AND CASHIER

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Below the top three boxes you will see a box labeled “ENTER SKU/CODE AND SELECT CLERK”.

The screenshot shows a dialog box titled "Enter SKU / CODE and Select Clerk". It contains three input fields:

- Field 1: A text input box containing the value "1247".
- Field 2: A dropdown menu labeled "Clerk:" with the value "amanda" selected.
- Field 3: A text input box labeled "Cashier:" containing the value "chelsea".

1. In the first field you will key in the “**SKU/CODE**” of the item. If the sku keyed in contains any dimensions they will be displayed on a drop down menu next to the item code field.
2. The next field will be labeled “**CLERK**”. Select this field to view a drop down menu, from here select a clerk to apply to the transaction.
3. Lastly, you will see the third field to the right labeled “**CASHIER**”. This field will

Display the cashier that is currently logged into the POS system. This field will not be activated.

***\*You cannot change the cashier while still logged in. This function cannot be used to apply multiple clerks to items within the transaction.***

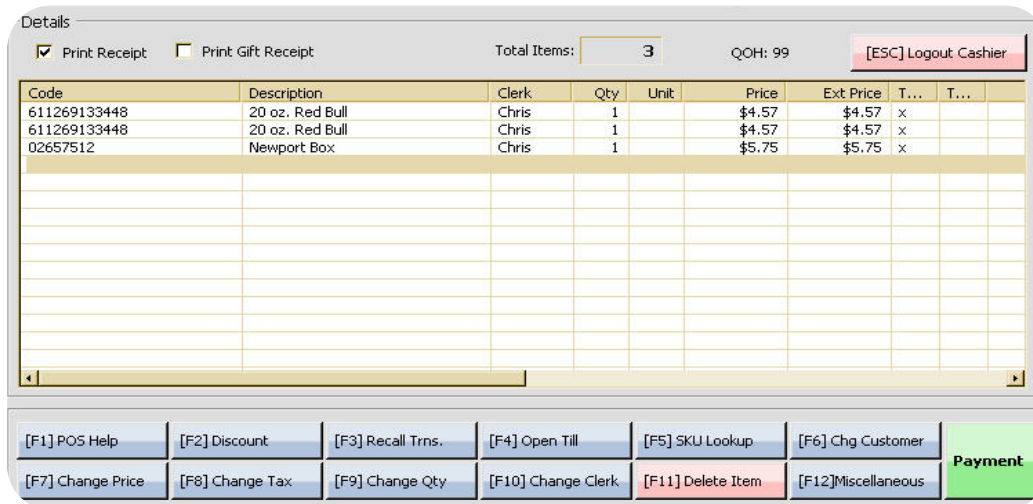


# CHAPTER ONE – POINT OF SALE

## TRANSACTION DETAILS

At the bottom of the window you will see the “**DETAILS**” screen. This screen will display the details of the current transaction.

1. Select from *Print Receipt*, *Print Return Auth* or *Print Gift Receipt* check boxes as needed.
2. To view the “**QoH**” (**Quantity on Hand**) of an item, first select an item from the transaction. Upon selecting an item, its QoH will be displayed to the left of the *Logout Cashier* button.
3. If you would like to logout or change cashiers, select the *Logout Cashier* button.



- The lower screen displays the items that have been entered into the current transaction. This screen will display the item *Code*, *Description*, *Clerk*, *Qty*, *Price*, and so on within the labeled columns.
- The bottom of the screen lists twelve different functions from which you can choose from to edit items added into the transaction. You can select any of these buttons or press F1-F12 to access these functions

## CHAPTER ONE – POINT OF SALE

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### QUICK LAUNCH AND MISCELLANEOUS TABS

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1. On the right side of the transaction screen will be two tabs labeled as **“QUICKLAUNCH”** and **“MISCELLANEOUS”**.
2. You can select the Miscellaneous button, press F12 or select the Miscellaneous button to view the miscellaneous functions. These are miscellaneous functions that are not listed at the bottom of the transaction window.

# CHAPTER ONE – POINT OF SALE

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## MAKING A DETAILED SALE

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1. Open POS and select the middle icon, from the middle of the screen labeled **“POINT OF SALE”**.
2. Login by username and password and select the **“LOGIN”** button, or press the **“ENTER”** key.



# CHAPTER ONE – POINT OF SALE

## MAKING A DETAILED SALE > SELECTING A CUSTOMER

1. Once you have logged in you will arrive at the **“SELECT/ADD/EDIT CUSTOMERS”** window. Scroll through to locate the customer you are searching for or select the **\*\*THANK YOU\*\*** customer; this is your default customer.
2. To search for a customer type a keyword into the **“INPUT KEYWORDS”** field at the top of the screen, the matching customer(s) will then be displayed.
3. Once you have located the customer you are searching for, either double click, press enter twice or highlight the customer and press the blue **“SELECT”** button situated on the top right of the screen to select the customer.



# CHAPTER ONE – POINT OF SALE

## MAKING A DETAILED SALE > INSERTING SKUs

1. Upon selecting the desired customer, the transaction window will be revealed. Within this window the customer's name and information will be displayed in the **"CUSTOMER"** box on the upper left corner of the screen.
2. Scan each item, or key in the Sku/Code of the product you wish to sell into the **"SKU/CODE"** field and press enter to insert the item into the transaction.
3. If you do not know the Sku/Code of the product, press **"(F5)"** or select the **"SKU LOOKUP"** button at the bottom of the screen to search for the sku.
4. Upon selecting the sku lookup button, a Sku Lookup window will then be displayed. Here you can view your inventory items, and locate the sku you wish to apply to the transaction by typing a keyword into the **"INPUT KEYWORDS"** field.

Customer

David's Comic Shop

David Dresten

1210 Carriage Lane

Kingston, Pennsylvania

18704 United States

SKU Lookup

Input Keywords:

[F5] Refresh Select Cancel

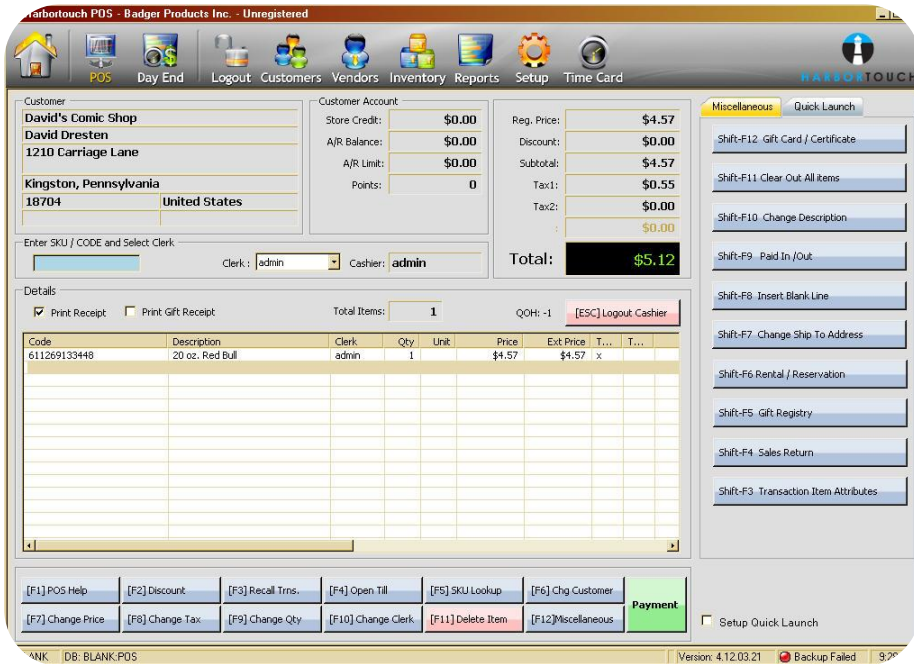
[F1] Sku [F2] Description [F3] Vendor [F4] Department [F9] Product #

Sku	Description	Vendor	Department	Cat.1	Cat.2	Product #	Cost	Price
1437	Western Spurs	Horse in the Box	03-Aparell->Access...	Size		WS-3455...		\$25.75
1212	Grooming Mitt	Lynn's Tack Shop	07-Grooming->Curr...	Color		GM-35249		\$5.95
1303	Metal Salt Block Holder	Saddle Guys	10-Stable Accessor...	Color		MSBH-674		\$5.50
1300	Mt. Horse Polo	Little Horse	03-Aparell->Casual ...	Jacket ...	Col...	MHP-4236		\$34.95
1298	Body Brush	Bucklers Tack Shop	07-Grooming->Brus...	Color		BB-34673		\$6.75
1297	Sheepskin Grooming ...	Bits and Bridles	07-Grooming->Curr...			SGM-4623		\$19.50
1293	Medecine Boot	Horse Boutique	09-Horse Accessor...	Color		MB-34782		\$29.95
1291	Saddle Soap	Horse Boutique	10-Stable Accessor...			SS-34893		\$10.50
1289	Crushed Oats	The Paddock	05-Feed			CO-47832		\$13.50
1278	Water De-Icer	Trotters	10-Stable Accessor...			WD-15425		\$25.00

5. Once you have located the sku, either double click it, or highlight it and press the blue **"SELECT"** button on the upper right side of the screen. This will then insert the selected sku into the transaction.
6. Upon selecting the desired sku, you will arrive back at the Transaction window. The selected Sku will be inserted into the *Item Code* field. Press the **"ENTER"** key to insert the item into the transaction.

# CHAPTER ONE – POINT OF SALE

## MAKING A DETAILED SALE > INSERTING SKUs (continued)



7. Once you have finished, select the green **"PAYMENT"** button on the bottom right corner of the screen. This will display a **"PROCESS PAYMENT"** window; here you will complete the sale

# CHAPTER ONE – POINT OF SALE

## MAKING A DETAILED SALE > COMPLETING A TRANSACTION

In the *Process Payment* window choose the appropriate payment method and key in the amount, or press **"INSERT"** to insert the exact amount into the selected payment field.

Some fields require a reference number or authorization number. You must enter in this number after inserting the payment in the selected payment field (for example if the customer was paying by check, you would enter the check number into the reference field).

1. Once the payment method has been entered into the preferred payment field, press the **"ENTER"** button and then select the green **"COMPLETE TRANSACTION"** button to finish.

**\*\*You must press "ENTER" in order to enable the "COMPLETE TRANSACTION" button.**

2. The Post Transaction Details window will be shown to inform you if any change is to be given to the customer, this will be displayed in the field at the top of the screen labeled **"CHANGE DUE"**.
3. Press the blue **"OK"** button at the bottom of this window to complete the sale.
  - This will take you back to the home screen where you will be prompted to re-enter your username and password to continue on to another transaction.

Payment Type	Payment	Reference
Cash: \$	0.00	
Debit: \$	0.00	
Visa: \$	132.83	0125485
M/C: \$	0.00	
Amex: \$	0.00	
Store Credit: \$	0.00	
Gift Card: \$	0.00	
Gift Cert: \$	0.00	
Points: \$	0.00	
A/R: \$	0.00	
Cheque: \$	0.00	
Deposit: \$	0.00	

CHANGE DUE

\$7.74

Last Transaction # 32

Print Receipt

Print Gift Receipt





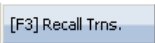
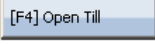
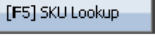
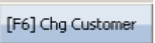

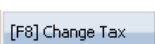
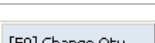


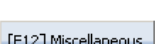
Print Mailing Label / Envelope

OK



# CHAPTER ONE – POINT OF SALE

## TRANSACTION FUNCTION KEYS

	<b>LOGOUT CASHIER</b>	Press <b>ESC</b> or the <b>LOGOUT CASHIER</b> button to logout or change the cashier. You will be taken to the home screen where a new cashier can then login.
	<b>PAYMENT</b>	The <b>PAYMENT</b> button will be located on the bottom right of the transaction window. Select this button to complete the transaction and reveal the process payment window.
	<b>[ F1] POS HELP</b>	For help, press <b>F1</b> or the blue <b>POS HELP</b> button at the bottom of the screen. A QUICK HELP window will then be displayed.
	<b>[ F2] DISCOUNT</b>	Press <b>F2</b> or select the <b>DISCOUNT</b> button at the bottom of the transaction screen to apply a discount to items that are on sale, damaged, etc. This can be applied to specific items or the entire transaction.
	<b>[ F3] RECALL TRNS</b>	Press <b>F3</b> or the <b>RECALL TRNS</b> button at the bottom of the transaction screen to Recall, Reprint or Void a transaction.
	<b>[ F4] OPEN TILL</b>	Press <b>F4</b> or the <b>OPEN TILL</b> button to open the till without printing a receipt.
	<b>[ F5] SKU LOOKUP</b>	Press <b>F5</b> or the <b>SKU LOOKUP</b> button to search for a Sku.
	<b>[ F6] CHANGE CUSTOMER</b>	Press <b>F6</b> or the <b>CHANGE CUSTOMER</b> button to change the customer. This will take you to the Customers window where you can view, edit or create new customers at any time during the transaction.
	<b>[ F7] CHANGE PRICE</b>	Press <b>F7</b> or the <b>CHANGE PRICE</b> button to change the price of an item that may be faulty, priced wrong, on sale, etc.
	<b>[ F8] CHANGE TAX</b>	Press <b>F8</b> or the <b>CHANGE TAX</b> button to edit the taxes being applied to the transaction. This will enable you to take off GST or PST for certain customers that exempt from paying taxes.
	<b>[ F9] CHANGE QUANTITY</b>	Press <b>F9</b> or the <b>CHANGE QTY</b> button to change the quantity of the currently selected item without having to scan or type it in multiple times (see Change Quantity on page xx).
	<b>[ F10] CHANGE CLERK</b>	Press <b>F10</b> or the <b>CHANGE CLERK</b> button to change the clerk of the current transaction. This will enable you to apply different clerks to different items within the transaction or one clerk for the entire transaction.
	<b>[ F11] DELETE ITEM</b>	Press <b>F11</b> or the <b>DELETE ITEM</b> button to remove a selected item from the current transaction.
	<b>[ F12] MISCELLANEOUS</b>	Press <b>F12</b> or the <b>MISCELLANEOUS</b> button to navigate to the miscellaneous tab. Here you will view nine miscellaneous functions which you can select by pressing Shift F4–Shift F12.

# CHAPTER ONE – POINT OF SALE

## TRANSACTION FUNCTIONS > LOGOUT CASHIER

1. To Logout or change cashiers select **"ESC"** or the red **"LOGOUT CASHIER"** button on the transaction screen.
2. This will bring you back to the initial home screen, from here a different cashier can then login to point of sale.

**Process Payment**

Transaction Payment Details

Cancel **\$0.00**

A/R Available: **\$0.00**

Payment Type	Amount	Reference
Cash: \$	0.00	
Debit: \$	0.00	
Visa: \$	1000.00	0122541
M/C: \$	0.00	
Amex: \$	1772.00	125421
Store Credit: \$	0.00	
Gift Card: \$	0.00	
Gift Cert: \$	0.00	
Points: \$	0.00	
A/R: \$	0.00	
Cheque: \$	0.00	
Deposit: \$	0.00	

Invoice Expired On: 6/13/2008

**Complete Transaction**

Additional Payment Types

Enable Special Payment Types

Debit	0.00	
Debit	0.00	
Debit	0.00	

Notes:

# CHAPTER ONE – POINT OF SALE

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## TRANSACTION FUNCTIONS > PROCESS PAYMENT

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Upon the insertion of a customer's items into the transaction you will select the **"PAYMENT"** button at the bottom of the transaction screen to complete the transaction. Upon selecting this button, a **"PROCESS PAYMENT"** window will be displayed.

1. Within this window you will view the *Balance Owing*, and the *AR Available* balance. You will also view three columns labeled as *Payment Type*, *Amount* and *Reference*, these will be displayed beneath the *AR Available* balance field.
2. In this window you will insert the payment into the desired payment type field by keying it in. You can also press the **"INSERT"** key to insert the exact amount owing into the payment field. The payment type fields are labeled as Cash, Debit, Visa, M/C (MasterCard), Discover, Amex (American Express), Store Credit, Gift Card, Gift Cert (Gift Certificate), Points, A/R, Check, and Deposit.
  - You can change, hide and add these payment types in the Setup section of your POS under General Settings, in the Payment Type Setup box.
  - For each payment type there will be two columns. One column is labeled as *Amount* and the other as *Reference*. Payment fields that require a reference or authorization number will have the reference field enabled such as *Debit*, *Visa*, and *MasterCard*.
3. To insert a payment into more than one payment field you can insert part of the amount owing into one field and the remaining balance into another (for example if the balance owing is 200.00, you could enter a partial payment of 150.00 into the debit field and then the remaining balance of 50.00 into the cash field).
4. Once you have inserted the payment into the correct payment field, press enter. This will enable the complete transaction button, select the **"COMPLETE TRANSACTION"** button to finish the transaction.

## CHAPTER ONE – POINT OF SALE

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### TRANSACTION FUNCTIONS > TRANSACTION TYPES

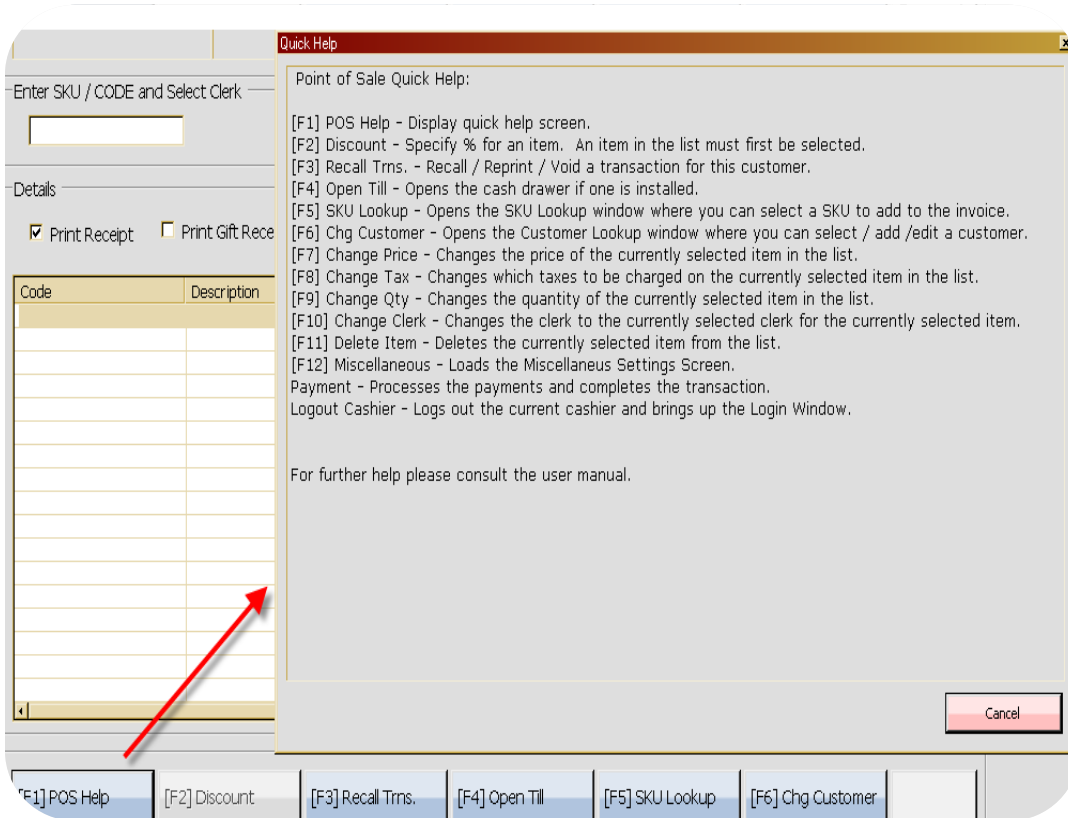
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1. To change the transaction type, select the field labeled **"INVOICE"** at the bottom of the process payment window.
  - Upon selecting this field a drop down menu will be displayed, listing the various transaction types you can select. These transaction types are listed as Invoice, Layaway, Quotation, Special Order, Park and Gift Registry.
2. Layaway, Quotation, Special Order, Park and Gift Registry will enable the **"EXPIRED ON"** field next to it. In this field you can select a date at which the transaction will expire.

# CHAPTER ONE – POINT OF SALE

## TRANSACTION FUNCTIONS > POS HELP

1. Press “F1” or the blue “POS HELP” button at the bottom of the transaction screen to display the “QUICK HELP” window.
2. This window will list the transaction functions from F1-F12 as well as the *Payment* and *Logout Cashier* buttons.
3. A small description of each function is also provided.



# CHAPTER ONE – POINT OF SALE

## TRANSACTION FUNCTIONS > GIVING A DISCOUNT

1. Press **"F2"** or the blue **"DISCOUNT"** button at the bottom of the transaction screen to apply a discount to a particular item. Upon selecting the Discount revealed.

From the transaction window, first select the item that you would like to apply a discount to, selecting an item will enable the *Discount* button.

2. In the field labeled **"% OFF"** enter in the percent you wish to reduce from the unit price of the selected item.

Once you have entered in a percent, the amount that will be deducted will be displayed in the *\$ Off On Unit Price* field. The new retail price of the item will also be displayed; this will be shown in the *New Unit Price* field.

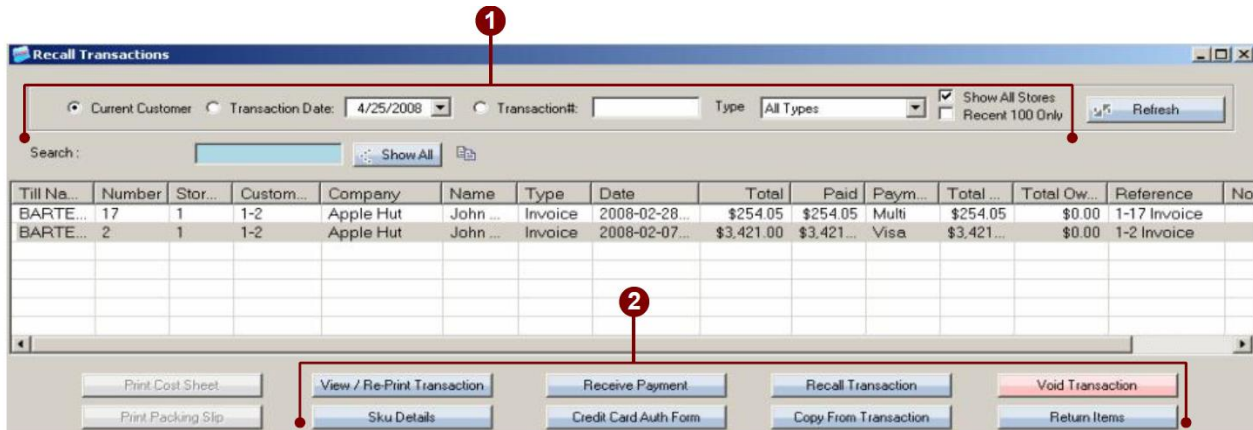
3. Next you will select a reason for the discount. Select the **"REASON"** field to display a dropdown menu, from this menu select the reason you wish to attach to the discount.
4. Once you have selected a reason you can choose what you will be applying the discount to. You can choose to *Apply Discount to Transaction (All Lines)*, *Discount on Reg. Price*, or *Prices Include Taxes*. Check off the desired checkbox next to any of these three choices.
5. When you have finished making your selections, select the blue **"CHANGE PRICE"** button on the bottom left side of the window to apply the discount to the transaction.

The screenshot shows a 'Discount' dialog box with the following fields and options:

- Current Line:** \$250.00
- % Off:** 20 (highlighted with a red box and callout 2)
- \$ Off on Unit Price:** 50.00
- New Unit Price:** 200.00
- Cost +%:** (empty)
- Reason:** Damaged (highlighted with a red box and callout 3)
- Details:** (empty text area)
- Apply Discount to Transaction (All Lines)
- Discount On Reg. Price (highlighted with a red box and callout 4)
- Prices Include Taxes
- Change Price** (blue button, highlighted with a red box and callout 5)
- Cancel** (pink button)

# CHAPTER ONE – POINT OF SALE

## TRANSACTION FUNCTIONS > RECALL A TRANSACTION



Press **"F3"** or the blue **"RECALL TRNS."** button at the bottom of the Point Of Sale screen to Recall, Reprint or Void a transaction for the currently selected customer.

1. Upon selecting this button a **"RECALL TRANSACTIONS"** window will be shown. Within this window you can view the selected customers transaction history, search for a particular transaction type from the selected customer only or from all customers within your store, you can display all stores as well as view only the Recent 100.
2. There will also be eight functional buttons situated at the bottom of the Recall Transactions screen. These buttons will be enabled for you to select from. They are labeled as, View / Re-Print Transaction, Sku Details, Receive Payment, Credit Card Auth Form, Recall Transaction, Copy From Transaction, Void Transaction, and Return Items. These are used when a transaction is selected.

## CHAPTER ONE – POINT OF SALE

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### TRANSACTION FUNCTIONS > OPEN TILL

---

1. Press **"F4"** or the blue **"OPEN TILL"** button at the bottom of the Point Of Sale screen to open the till. This function will open the till without printing out a receipt.



# CHAPTER ONE – POINT OF SALE

## TRANSACTION FUNCTIONS > CHANGE CUSTOMER

1. Press **"F6"** or the blue **"CHG CUSTOMER"** button to switch the customer associated with the current transaction.

Upon selecting this button you will arrive at the customers screen, here you can view, create or edit customers.

2. Scroll through the list to locate the customer you wish to switch to. To narrow down your search you can type a keyword into the **"INPUT KEYWORD"** field at the top of the screen. This will highlight the customer.
3. To further simplify your search you can press **"F1-F4"** or **"F6-F7"**. For example if you press F7 you will now be searching by *Phone*. Therefore you will now enter the customer's phone number into the **"INPUT KEYWORD"** field to locate the customer with the matching phone number.
4. Once you have located the customer you wish to associate with the transaction, double click the customer to select them or highlight the customer and click the blue **"SELECT"** button at the top right hand side of the screen.

You will then be taken back to the Transaction window where the selected customer will now be inserted into the Customer box situated on the upper left side of the screen.

Company Name	First Name	Last Name	Address	City	Province / State	Phone 1	Phone 2	Cell Pho...	Fax	Email	Customer ID	Men
Judy's	Erich	Myers	2409 Shinn Av...	Wampum	Pennsylvania						1-3	
Sounds of Soul Records...	Lucille	Stanley	1567 Pine Street	Pittsburgh	Pennsylvania						1-5	
David's Comic Shop	David	Dresten	1210 Carriage ...	Kingston	Pennsylvania						1-2	
Action Auto	Brian	Spencer	2438 Harley Br...	Johnstown	Pennsylvania						1-4	
		**THANK ...									1-1	

# CHAPTER ONE – POINT OF SALE

## TRANSACTION FUNCTIONS > CHANGE PRICE

1. To change the price of an item first select the item to enable the change price button then press **"F7"** or select the blue **"CHANGE PRICE"** button at the bottom of the transaction window to change the sale price of the selected item.
2. Upon selecting the change price button a *Discount* window will then be displayed, this is where you will enter in the new unit price of the selected item.
3. Enter the new price of the item into the third field labeled **"NEW UNIT PRICE"**.

The **"% OFF"** field will display the percent that will be deducted from the item and the **"\$ OFF ON UNIT PRICE"** field will display the amount in dollars that was deducted from the unit price of the item.

4. Once you have changed the price select the **"REASON"** field. This will display a drop down menu, from this menu select the reason that will be applied to the adjustment of the price.

*\*\*These reasons are created in the Setup section of POS under Inventory Settings, in the Attributes box under discount*

5. After you have selected a reason, you will then check the checkbox next to either; Apply Discount to Transaction (All Lines), or Prices Include Taxes.
6. Once you have made your choices you will select the blue **"CHANGE PRICE"** button at the bottom of the screen to change the price of the selected item

The screenshot shows the 'Discount' window with the following fields and values:

- Current Line: \$2,750.00
- % Off: 27.27
- \$ Off on Unit Price: 750.00
- New Unit Price: 2000.00
- Cost +%:
- Reason: VIP Customer
- Details:
- Apply Discount to Transaction (All Lines)
- Discount On Reg. Price
- Prices Include Taxes
- Buttons: Change Price, Cancel, Show Last 3 Transactions

*Note: The discount on reg. price option will be deactivated, you cannot edit this option. If the item does not have a price in the database a change price window will appear instead of this window.*

# CHAPTER ONE – POINT OF SALE

## TRANSACTION FUNCTIONS > CHANGE TAX

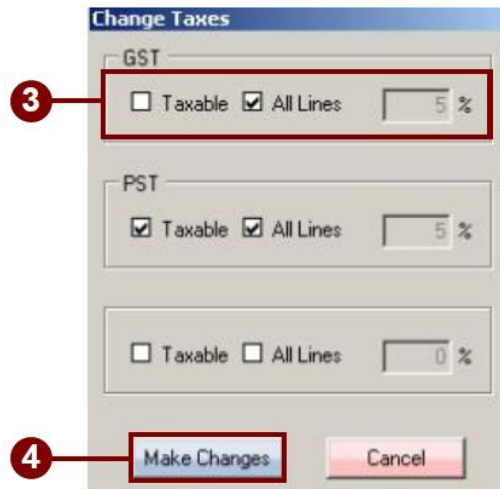
**Note:** You must first select an item to enable this function.

1. Press “F8” or the blue “CHANGE TAX” button to edit the taxes that are being applied to the transaction or items within the transaction. Upon selecting this option a “CHANGE TAXES” window will be displayed.
2. Choose the desired taxes you wish to apply to the item by checking the boxes.
3. To apply tax to all lines of the transaction check off the “TAXABLE” and the “ALL LINES” box.

To remove particular taxes from an item uncheck both the *Taxable* and *All Lines* checkboxes in the selected tax field (repeat the same steps to remove all taxes from the transaction). To remove tax from all lines uncheck the *Taxable* box and check the *All Lines* box.

To apply or remove a tax to one selected item only, select the item and select the desired taxes you wish to apply or remove from the item (you can remove taxes from all other items and apply tax to this item only).

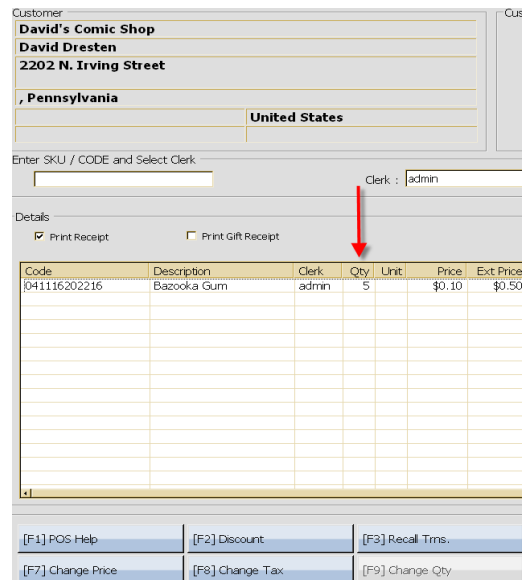
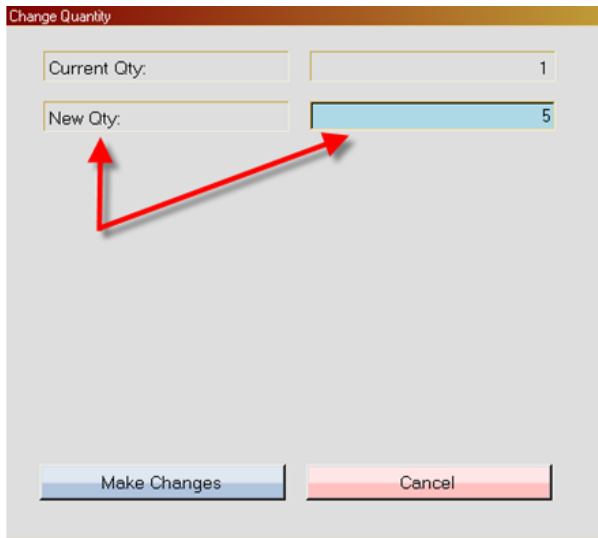
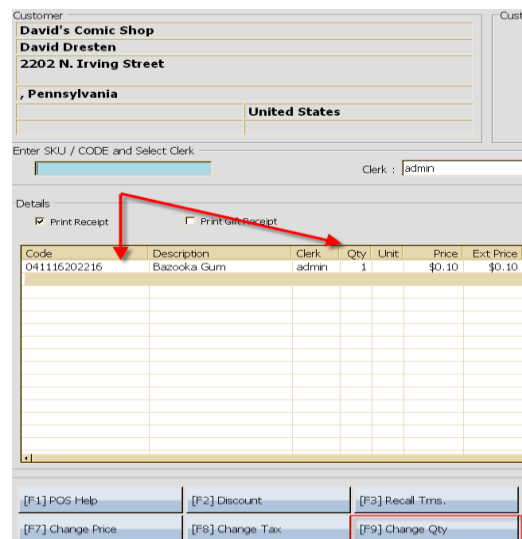
4. Once you have made your choices select the blue “MAKE CHANGES” button at the bottom of the window.



# CHAPTER ONE – POINT OF SALE

## TRANSACTION FUNCTIONS > CHANGE QUANTITY

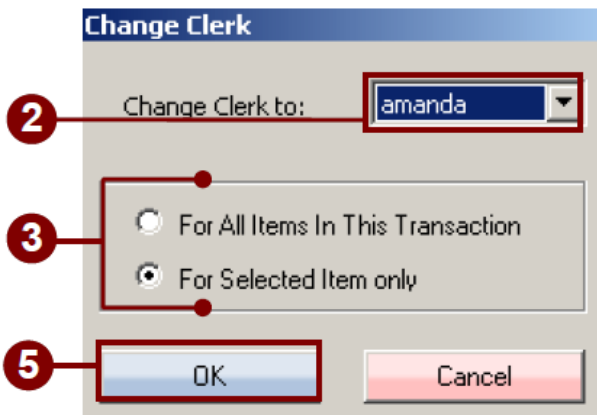
1. First you will select the item you wish to change the quantity for, before selecting the Change Qty button .
2. Press **"F9"** or the blue **"CHANGE QUANTITY"** button at the bottom of the transaction window to adjust the quantity of a selected item within the transaction.
3. Upon selecting the blue **"CHANGE QUANTITY"** Button a window will then be displayed. Within this window you will enter in the new quantity of the item into the **"NEW QTY"** field.
4. Once you have entered in the new quantity select the blue **"MAKE CHANGES"** button to apply the new Qty the selected item.



# CHAPTER ONE – POINT OF SALE

## TRANSACTION FUNCTIONS > CHANGE CLERK

1. Press **"F10"** or the blue **"CHANGE CLERK"** button to change the clerk(s) being applied to certain items within the current transaction. This will then bring up a *Change Clerk* window.
2. Select the **"CHANGE CLERK TO"** field to bring up a drop down menu, this menu will list all the employees within your store. From this menu you will then select the clerk whom you would like to apply to the selected item(s).
3. To apply one clerk to the entire transaction check the *For All Items In This Transaction* checkbox (upon selecting this, you cannot apply any more clerks to the transaction).  
You can also choose to apply the clerk to one selected item, by first selecting the item, then select the *Change Clerk* button or press F10. Select the clerk whom you would like to apply to the selected item then check the *For Selected Item Only* checkbox.
4. You can use this option when you intend to apply multiple clerks to the transaction (you can apply different clerks to each item in the transaction). You can also do this when you wish to apply only one clerk to the entire transaction.
5. Once you have made your choices select the blue **"OK"** button at the bottom of this window. The clerk that you have applied to the selected item will appear on the transaction screen in the clerk column of the selected item. The clerk will also be displayed in the clerk field.



## CHAPTER ONE – POINT OF SALE

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### TRANSACTION FUNCTIONS > DELETE AN ITEM

---

1. To delete an item from the transaction first select the item you wish to remove this will enable the **DELETE ITEM** button. Once you have selected the item select either **F11** or the red **DELETE ITEM** button.

# CHAPTER ONE – POINT OF SALE

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## TRANSACTION FUNCTIONS > MISCELLANEOUS TAB

---

1. Press **"F12"** or the blue **"MISCELLANEOUS"** button to activate the miscellaneous tab on the right side of the transaction window located next to the Quick Launch tab.
2. Here you can choose from nine different functions. You can press Shift-F12 to sell a Gift Certificate, Shift-F11 to Clear All Items in the list, Shift-F10 to Change the Description, Shift-F9 to do a Paid In/Out, Shift-F8 to Insert a Blank Line, Shift-F7 to Change Ship to Address, Shift-F6 to do a Rental/Reservation, Shift-F5 to do a Gift Registry, and Shift-F4 to do a Sales Return).



# CHAPTER TWO – REPORTS & QUERIES

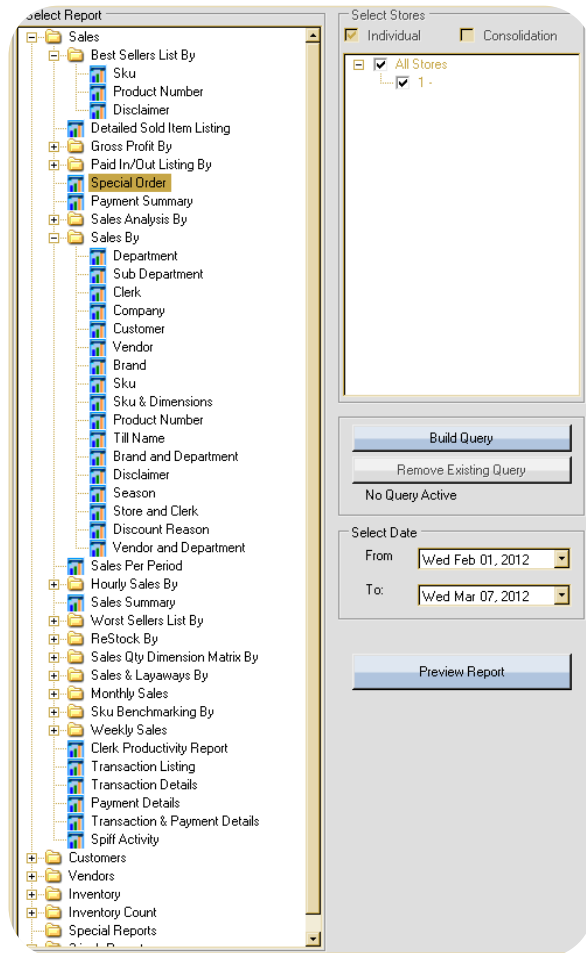
## OPENING REPORTS

1. Login to POS by username and password. This will enable the **“REPORTS”** icon. Select the *Reports* icon.
2. Upon selecting this icon you will arrive at the Reports screen. Here you can create reports to view.

For example you can create reports for; transaction reports for total sales, a bestsellers list by Sku, individual sale by department and so on.

The reports screen will display three different sections.

- The first window on the left side of the screen will display the reports from which you can select.
- The middle window will be where you select the Stores, Build a Query, Select Dates and Preview the Report.
- The window on the right side of the screen displays the Quick Report Buttons. Here you can set up your favorite reports.

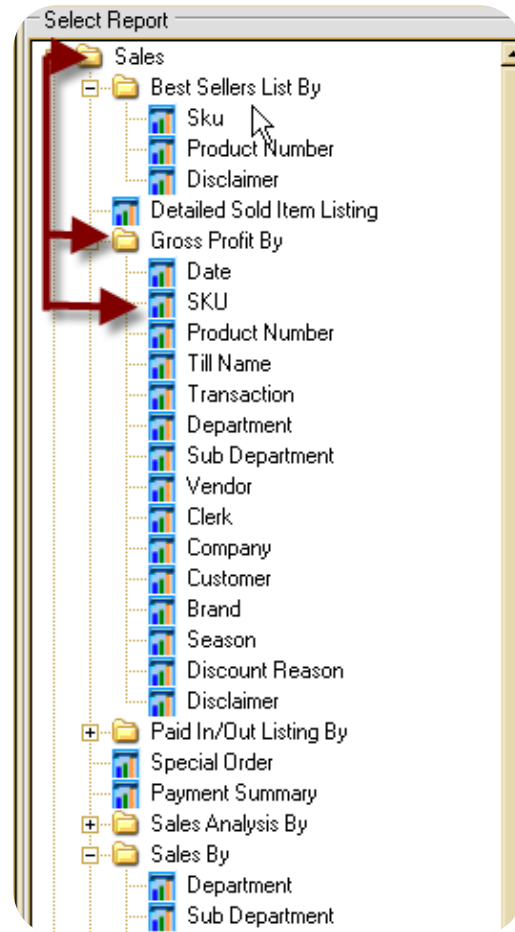




# CHAPTER TWO – REPORTS & QUERIES

## SELECTING A REPORT

1. On the Reports screen, first select the report you wish to view from the first box located on the left side of the screen, labeled **"SELECT REPORT"**.
  - Within this box you will see seven reports in which to choose from. Each of these reports contains a root, displaying a list of sub reports.
  - These seven reports displayed are labeled as; Sales, Customers, Vendors, Inventory, Inventory Count, Special Reports and 3-Inch Reports.
2. To extend the root for these options, select the plus sign located to the left of it. When the root is extended, the sub reports located within may or may not contain a root of sub reports. In order to create a report you must select a report that does not contain any sub reports within it.
3. For example; Extend the Sales root, from this root select Gross Profit By. Next you will extend the gross profit by root, from here you can then select Sku (this means that you are viewing a sales report of gross profit by sku).
4. Once you have selected the report you wish to view, the **"BUILD QUERY"** and **"PREVIEW REPORT"** buttons in the middle of the window will become enabled.



## CHAPTER TWO – REPORTS & QUERIES

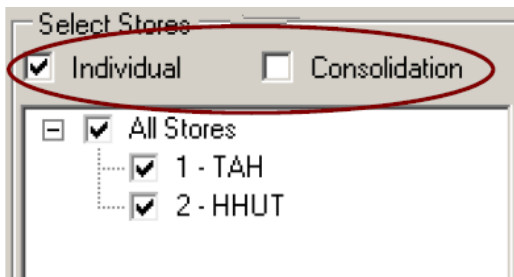
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### SELECTING A STORE

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Next you will proceed to the middle of the *Reports* window. Here you can select stores, build a query and access the report through the *Preview Report* button.

1. The box located at the top of the screen will be labeled as **“SELECT STORE”**.
2. Here you can select from either *Individual* or *Consolidation* by checking the checkbox next to either of the two choices. Next you can select which stores you would like to view the report from by checking the checkbox located to the left of the store you would like to view within your report.



## CHAPTER TWO – REPORTS & QUERIES

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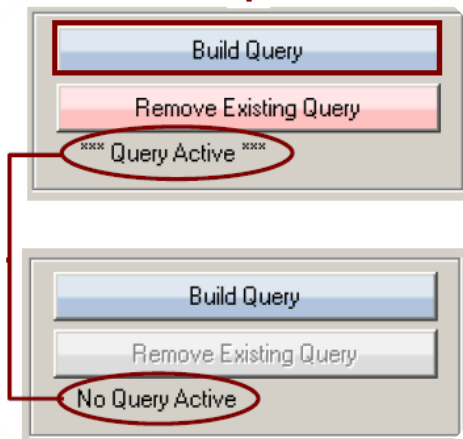
### SELECTING DATES

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Below this box you will see a *Build Query* and *Remove Existing Query* button.

Select the **“BUILD QUERY”** button to create a query. A query builder window will then be displayed. Here you will enter in the required information needed to build a query

1. To remove an existing query, select the **“REMOVE EXISTING QUERY”** button. Below this button will be a note displaying whether or not there is a *Query Active*.
2. You can then allot dates in which to view the report. These are located in the **“SELECT DATE”** box. You will then select a date from the **“FROM”** and **“TO”** fields.



# CHAPTER TWO – REPORTS & QUERIES

## VIEWING THE REPORT

1. Once you have made all your choices select the **“PREVIEW REPORT”** button at the bottom of the middle box.
2. The report will then be shown in the new window labeled as **“REPORT”** (this window will expand across the entire screen).
3. At the top of the report you will see tabs. These tabs will display the stores and options you have selected, for example they might display, store 1, store 2 and Consolidation, select these tabs to view a different report.
4. If you would like to print the report, select the *Print To Printer* button in the upper right corner of the window.
5. To return to the main screen, select the **“X”** button located in the top right corner of the screen. Upon closing the window, you will return to the reports screen.

5

Variance By SKU

2

Main Report

Multi-Store Consolidation (1,2)

Gross Profit By SKU

From: Thursday, May 1, 2008 To: Friday, June 20, 2008 Page 1 of 1

SKU	Trans Type	Sold	%	Gross Sales	Mark Down	Net Sales	%	Cost	%	Gross Profit	%	Mar
1202	Velvet Helmet :Velv	1	1.12%	\$120.00	\$0.00	\$120.00	0.37%	45.00	0.34%	\$75.00	0.39%	67
1218	Western Saddle Pad	1	1.12%	\$35.00	\$0.00	\$35.00	0.11%	15.00	0.11%	\$20.00	0.10%	51
1228	Tail Bag : Nylon	-1	-1.12%	-\$10.00	\$0.00	-\$10.00	-0.03%	-5.00	-0.04%	-\$5.00	-0.03%	60
1233	Hawkestone :Leather	-1	-1.12%	-\$25.95	\$0.00	-\$25.95	-0.08%	-15.00	-0.11%	-\$10.95	-0.06%	42
1235	Western Saddle :Lbr	10	11.24%	\$25,000.00	\$0.00	\$25,000.00	76.51%	10,000.00	74.64%	\$15,000.00	77.80%	68
1241	Show Sheen	1	1.12%	\$15.50	\$0.00	\$15.50	0.05%	5.01	0.04%	\$10.49	0.05%	61
1242	Mane Conditioner	1	1.12%	\$8.50	\$0.00	\$8.50	0.03%	5.52	0.04%	\$2.98	0.02%	38
1246	Belt Buckle :Metal	8	8.98%	\$120.00	\$0.00	\$120.00	0.37%	40.16	0.30%	\$79.84	0.41%	66
1246	Tail Extension :Hors	1	1.12%	\$50.00	\$0.00	\$50.00	0.15%	25.05	0.19%	\$24.95	0.13%	46
1247	Dandy Brush :Wood	1	1.12%	\$7.50	\$0.00	\$7.50	0.02%	2.56	0.02%	\$4.94	0.03%	65
1248	Close Contact Saddle	2	2.25%	\$5,000.00	\$0.00	\$5,000.00	15.30%	2,000.00	14.93%	\$3,000.00	15.58%	69
1254	Mane Pulling Comb :	16	17.98%	\$40.00	\$0.00	\$40.00	0.12%	16.00	0.12%	\$24.00	0.12%	60
1267	Atlatla Hay	1	1.12%	\$6.60	\$0.00	\$6.60	0.02%	4.01	0.03%	\$2.49	0.01%	36
1268	Timothy Hay	4	4.49%	\$20.00	\$0.00	\$20.00	0.09%	20.04	0.15%	\$7.96	0.04%	28
1263	Belt Boots :Rubber	0	0.00%	\$0.00	\$0.00	\$0.00	0.00%	0.00	0.00%	\$0.00	0.00%	0
1265	Solar Powered Electr	1	1.12%	\$180.00	\$0.00	\$180.00	0.55%	80.00	0.45%	\$100.00	0.52%	66
Totals:		0		\$0.00	\$0.00	13	\$1,217.10	\$1,585.00	13	\$1,217.10	\$1,217.10	

Current Page No: 1 Total Page No: 1 Zoom Factor: 100%

## CHAPTER TWO – REPORTS & QUERIES

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### BUILDING QUERIES

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1. To build a Query select the **“BUILD QUERY”** button located within the window you will be creating the query for. Upon selecting this option a query builder window will then be displayed. Here you will enter in the information required to create a report.
2. On the top left side of the screen a note will be displayed stating which report you are building a query for, this note will be displayed as; Build Query For Report: (the report you are building a query for, will be displayed beside).

The information required to create a report will be entered into the following boxes; Condition, Pre-Saved Queries, Current Query.

## CHAPTER TWO – REPORTS & QUERIES

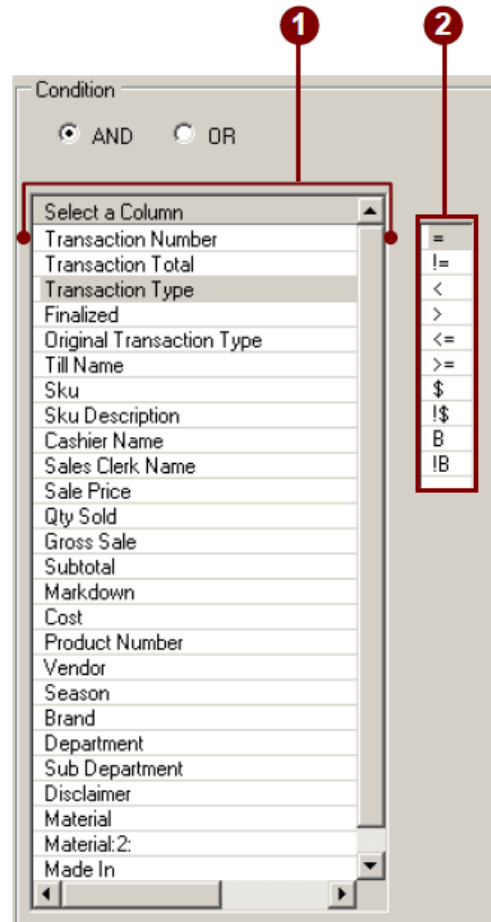
### SELECTING QUERY INFORMATION

The box on the left side of the screen labeled “**CONDITION**” will contain the options in which you will choose from to create your report.

1. The field on the left side of the condition box will be labeled as “**SELECT A COLUMN**”. Here you will select the desired column you wish to choose for your query.

\*For example, if you were building a query in the reports section of POS you would view columns such as; Transaction Number, Transaction Total, Sku, Cashier Name, Cost, Product Number, Department and so on.

2. Once you have selected a column you will then select an operator.
3. These options are displayed between the column field and the value field. Here you can choose from; Exactly Equal To, Not Equal To, Less Than, Greater Than, Less Than Or Equal To, Greater Than Or Equal To, Contains and so on.
4. Once you have selected an option, you will then select a value.



## CHAPTER TWO – REPORTS & QUERIES

### SELECTING A QUERY VALUE

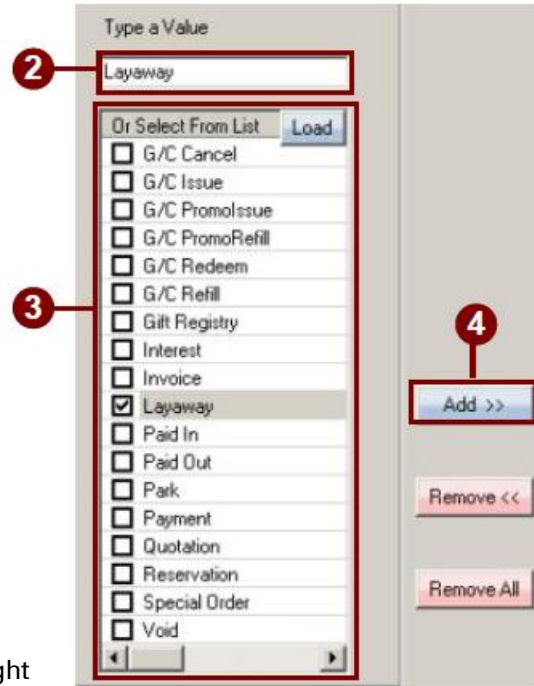
1. Lastly you will select a value for your query, you will select a value from the third box to the right that will list all the values you can choose from.
2. At the top of this box you will see the **“TYPE A VALUE”** field. If you would like to type in a value, key in your value name into the available field.
3. If the column you have selected contains values then the value list will appear below the value field, you can then select a value from the list displayed.

To load this list, select the **“LOAD”** button at the top of the list.

\*For example if you selected Transaction Type as a column, the values displayed will be; G/C Cancel, G/C Redeem, Interest, Layaway, Park, Void and so on.

Once the list has loaded select the values you would like to view, by checking the checkbox located on the left side of the displayed values.

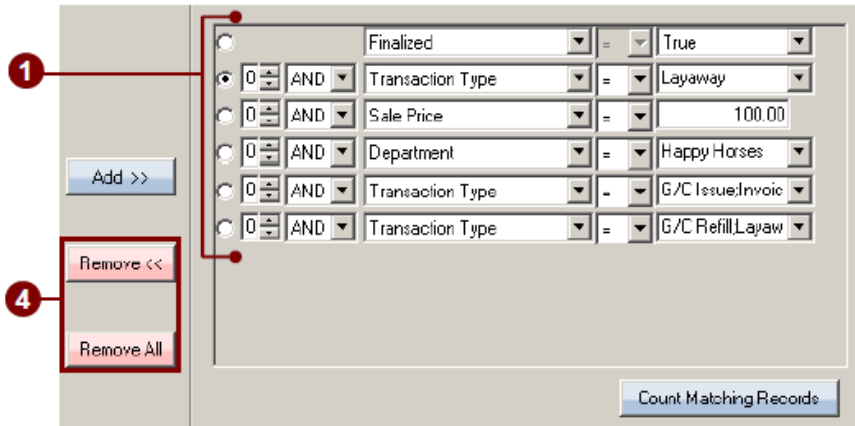
4. Once you have made all your selections, select the **“ADD”** button. This will insert the query into the far right box labeled as **“CURRENT QUERY”**.



## CHAPTER TWO – REPORTS & QUERIES

### CURRENTLY CREATED QUERIES

1. On the bottom right side of the screen you will see a box labeled **“CURRENT QUERY”**. This box will contain the current queries that you have created in a list.
2. Here you can select a query that you would like to view on the report. Upon selecting the desired Query select the Done button at the bottom of the screen to view the report.
3. You can also edit these previously created queries by selecting the fields within the query, each field will display a drop down menu listing the options that you can select.  
Each field will display a drop down menu showing options that you can choose from.
4. To remove a query, select the query you would like to remove. Then select the **“REMOVE”** button to the left of this box. To remove all queries select the **“REMOVE ALL”** button.





## CHAPTER TWO – REPORTS & QUERIES

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### SAVING A QUERY

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1. To save a currently created query, you must first select the query that you would like to save.
2. After you have selected the desired query you will then key in a name for the query into the **"NAME"** field at the top of the *Current Query* box.
3. Once you have keyed in a name for the query, select the **"SAVE QUERY"** button to the right of this field. This will then insert the query into the above field labeled **"PRE-SAVED QUERIES"**.

The screenshot shows a dialog box titled "Current Query". At the top, there is a "Name:" label followed by a text input field containing "Transaction Type = Layaway" and a green "Save Query" button. A red box highlights the text input field, with a red circle containing the number "2" above it. A red arrow points from the text input field to the first row of the query criteria table below. The table has five rows, each with a radio button, a logical operator (AND), a field name, an equals sign, and a value. The first row is selected, and its radio button is checked. A red circle containing the number "3" is above the "Save Query" button.

Radio	AND	Field	=	Value
<input checked="" type="radio"/>	AND	Transaction Type	=	Layaway
<input type="radio"/>	AND	Invoice	=	Invoice
<input type="radio"/>	AND	Sku	=	1207;1245;1254;
<input type="radio"/>	AND	Department	=	06-General Hors
<input type="radio"/>	AND	Vendor	=	Bucklers Tack S

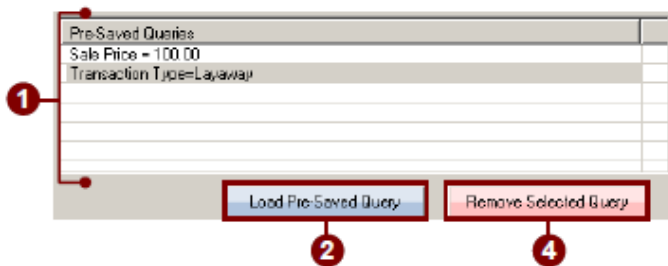
## CHAPTER TWO – REPORTS & QUERIES

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### VIEWING SAVED QUERIES

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1. Your pre-saved queries will be displayed in the box located on the upper right side of the query builder window, this box will be labeled as **PRE-SAVED QUERIES**.
2. To load up a pre saved query, select the query you would like to load, then select the **“LOAD PRE-SAVED QUERY”** button displayed at the bottom of the box.
3. Upon selecting this button, the selected query will be loaded into the *Current Query* box.  
*\*From the current query box you can then select or edit the pre-saved query.*
4. To remove a pre-saved query from the pre-saved queries box, select the query that you would like to remove, then select the **“REMOVE SELECTED QUERY”** button located at the bottom of this box.  
*\*The Load Pre-Saved Query and Remove Selected Query buttons will not become enabled until you have selected a query from the pre-saved query field.*
5. Once you have created or selected the desired query that you would like to view, select the **“DONE”** button located on the bottom right side of the Query Builder screen.



## CHAPTER THREE – INVENTORY

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### OPENING INVENTORY

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1. Open POS and Login by username and password.
2. Once logged in the Inventory icon will become enabled.
3. Select the **"INVENTORY"** icon.
  - Upon selecting the inventory icon you will arrive at the inventory screen. In this screen you will see six tabs labeled as; Sku's, Inventory, Purchase Orders, Specials Order, Inventory Count and Transfers.

# CHAPTER THREE – INVENTORY

## SKUs > VIEWING CREATED SKUs

Select the first tab labeled **“SKU’S”**. Here you can create and edit sku’s as well as view their information.

1. To view a sku, select the sku or insert a keyword into the **“SEARCH”** field to locate the desired sku.
2. When you insert a keyword into the Search field select the **“SHOW ALL”** button to display a pop up window displaying the sku’s relating to the typed keyword. Once you have located the desired sku you would like to view, select it. Upon selecting the sku, the sku and its information will be inserted into the bottom window.

Here you can edit the sku as needed, when you have finished select the **“SAVE”** button to save your changes.

3. To hide or display inactive sku’s, check or uncheck the check box located next to **“HIDE INACTIVE”**. Upon making this selection, select the **“REFRESH”** button located on the right side of the screen to load up a new list.
4. If you would like to remove a sku from your inventory, first select the sku that you would like to delete then select the **“DELETE SKU”** button on the upper right side of the screen. Upon selecting this option, you will then be prompted to confirm the deletion of the selected sku, select **“OK”** to continue.

**Note: You cannot delete a sku that has receiving history.**

5. To create a new sku first key in a sku number into the **“NEW SKU”** field at the top of the screen, then select the **“CREATE NEW SKU”** button. The bottom screen will become empty and the sku number will be inserted into the *Sku* field (you cannot change the sku number once you have created the sku).

The screenshot displays the 'SKU'S' tab in the inventory management software. At the top, there are navigation tabs: 'Skus', 'Inventory', 'Purchase Orders', 'Special Order', 'Inventory Count', and 'Transfers'. The 'Skus' tab is active. Below the tabs, there is a search bar with '1248' entered and a 'Show All' button. To the right, there is a 'New Sku:' field with a 'Create New Sku' button and a 'Delete Sku' button. A table of SKUs is shown below, with the selected item (SKU 1248) highlighted. The table columns include Sku, Description, Vendor, Department, Cat. 1, Cat. 2, Product Num, List Cost, and Avg. Below the table, there is a detailed view of the selected item (SKU 1248) with fields for Description, Product #, Group, Vendor, Brand, Dept., Season, and various pricing and attribute options.

Sku	Description	Vendor	Department	Cat. 1	Cat. 2	Product Num	List Cost	Avg
1240	English Show Coat	Horse Boutique	03-Aparel->Engl	Jockey Size		ESC-8625	\$100.00	\$11
1241	Show Sheen	Horse Boutique	07-Grooming->Co			SS-78248	\$5.00	
1242	Mane Conditioner	Mane And Tail	07-Grooming->Co			MC-67671	\$5.50	
1243	Training Bit	The Horse Stable	12-Western Tack			TB-78758	\$20.00	\$
1244	Loose Ring Snaffle	Horse Boutique	08-English Tack			LPS-7869	\$15.00	\$
1245	Belt Buckle	Horse Boutique	08-Aparel->West			BB-78527	\$5.00	\$
1246	Tail Extension	Mane And Tail	09-Horse Access...			TE-78297	\$25.00	\$
1247	Dandy Brush	Mane And Tail	07-Grooming->Br			DB-78253	\$2.50	\$
1248	Close Contact Saddle	Horse Barn	08-English Tack	Tree Size	Seat Size	CCS-4738	\$1,000.00	\$130
1249	Dressage Saddle	Horse Barn	08-English Tack	Tree Size	Seat Size	DS-78673	\$1,500.00	\$150
1250	Cutting Saddle	Horse Barn	12-Western Tack	Tree Size	Seat Size	CS-78929	\$950.00	\$90
1251	Cotton Blanket	Blankets Tr Us	02-Blankets->Cot	Blanket Size		CB-78932	\$25.00	\$
1252	Fly Sheet	Blankets Tr Us	02-Blankets->Fly	Blanket Size		FS-78397	\$25.00	\$

**Info** | Prices | Inventory Items & Lookups | Who Bought This Item

Sku: 1248 Created: 2009-02-08 01:54

Description: Close Contact Saddle

Product #: CCS-4738

Group: Unit: [Dropdown]

Vendor: Horse Barn

Brand: Stubben

Dept.: 08-English Tack->

Season: All

Dimension Categories:

Dim1: Tree Size

Dim2: Seat Size

Dim3: [Dropdown]

Dim4: [Dropdown]

Attributes:

Disclaimer: [Text Field]

Material: Leather

Material 2: [Dropdown]

Made In: [Dropdown]

Prices Incl:  Taxes  GST  PST  Partial Qty  QOH=0  Basket  Rental  Active

Reg. Sell Price: 2500.00 Special Price: [Text Field]

List Cost: 1000.00 Min. Price: 0.00

Recent Landed: \$1,000.00 PKG Qty: 1

Avg. Cost: \$3,997.18 Points: 2500

Spiffs: 0.00

Picture: [Image Placeholder] Clear [Button] Browse... [Button]

Min/Max [Button] Print Labels [Button] Save [Button]

# CHAPTER THREE – INVENTORY

## SKUs > CREATING A NEW SKU

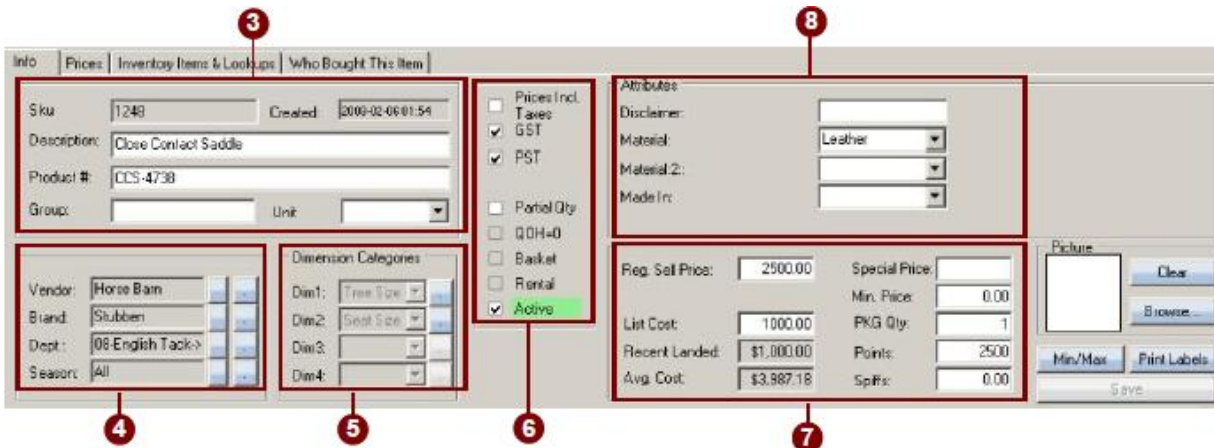
1. Upon creating a new sku proceed to the bottom screen, here you will be on the first tab labeled as **"INFO"**. Here you will then proceed to enter in the sku's information into the labeled fields as required.

If you wish to add a picture, do so by selecting the browse button located on the right side of the window. You will then select the picture you would like to add to the sku. To remove a picture from the sku select the clear button.

2. To adjust the sku's *Stocking Quantities, Store Location* and *Adjust the Quantity on Hand*, select the *Min/Max* button located on the right side of the window. Upon selecting this button an *Edit inventory* window will be displayed, here you can make your changes as needed.

If you wish to Print Labels select the Print Labels button on the right side of the screen.

Located on this window there will be six separate boxes displayed, these boxes will be labeled as; Sku Description , The Vendor and Department, Dimension Categories, Tax Information, Prices, and Attributes .



# CHAPTER THREE – INVENTORY

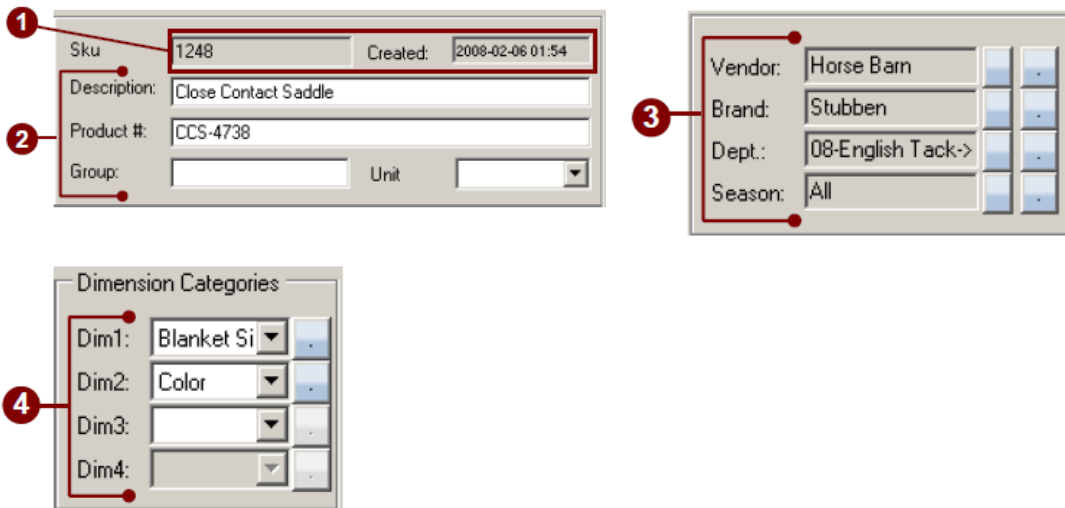
## SKUs > INSERTING SKU INFORMATION

In the first box located on the upper left corner of the window you will proceed to enter in the sku's basic information.

1. At the top of this box you will see the sku number as well as the date and time when the sku was created. You cannot edit these fields.
2. In the lower fields, you will key in a Description, the Product Number, a Group and a Unit for the sku. To apply a unit, select the unit field to reveal a drop down menu, from which you can select the desired unit. After you have entered in the sku's basic info, proceed to the next box beneath the current one. Here you will apply a Vendor, Brand, Department and a Season to the sku, (you must assign a department in order to save the sku).

Select the blue button located on the right side of each of these options to display a drop down menu. This menu will list the options that you have to choose from, select the desired option that you would like to apply to the sku.

3. Once you have applied vendors and so on, to the sku, proceed to the next box located to the right. This box will be labeled as **"DIMENSION CATEGORIES"**. Here you will assign categories and dimensions to the selected sku.
  - These dimension fields will be labeled from Dim.1 to Dim. 4. To assign a category to the item select the field next to the Dim. 1, this will display a drop down menu. This menu will list the categories that you have setup in the setup section. Select the desired category (for example: jacket size).
  - Upon selecting a category the Dim field below will then become enabled.
  - To edit the dimensions being applied to the item, select the blue button located next to the field to view the category dimensions. Select the dimensions you would like to apply to the item by checking off the check boxes. When you have selected the desired categories select the **"SAVE"** button to save your choices.



# CHAPTER THREE – INVENTORY

## SKUs > INSERTING SKU INFORMATION

4. Once you have finished setting up your dimension categories you will then proceed to the next box. This box will contain options such as Prices Incl. Taxes, Partial Qty, QOH=0, Basket, Rental and Active. Check the checkbox located next to any of the choices that you would like to apply to the sku.

QOH =0 means Quantity On Hand always zero. This is used when you have a non-inventory (aka Service SKU). Example: Delivery Fee, Alterations, Shipping, etc.

5. In the next box you will key in the price of the item. In the *Reg. Sell Price* field key in the regular price that you will be selling the item for.

- In the *List Cost* field key in the price that you pay for the item. When you have filled in both of these fields, select the *Reg. Sell Price* field to view the *Margin Percent* and the *Mark-Up Percent*.
- The *Recent Landed* and *Avg. Cost* fields will be un-enabled, these will be automatically updated as you order and sell the item.
- Next enter in (if needed) a *Special Price*, *Min Price*, *Points* and *Spiffs* into the labeled fields. Select each field to display a window in which you will enter in the required information needed
- In the **"PKG QTY"** field, key in the amount of items located within a package.

6. Lastly you will proceed to the **"ATTRIBUTES"** box. Here you will fill in the attributes that you have created for sku's.

- Attributes can be created in the Setup section of POS under General Setting in the Attributes box (for example you can create an attribute for the type of material the item is made of)
- In the last box to the right of the screen you can upload a picture of the Sku by selecting *Browse* then select the picture.
- You can also print labels by selecting the *Print Labels* button.

7. Once you have finished entering in the required information needed to create a new sku, select the **"SAVE"** button on the bottom right side of the screen to save the newly created sku.

A vertical list of checkboxes with labels: Prices Incl. Taxes (unchecked), Tax1 (checked), Tax2 (unchecked), Partial Qty (unchecked), QOH=0 (unchecked), Basket (unchecked), Rental (unchecked), and Active (checked). The 'Active' checkbox is highlighted with a green background.

A pricing form with two columns of input fields. A red box labeled '6' encloses the first column. The fields and their values are: Reg. Sell Price: 2500.00, List Cost: 1000.00, Recent Landed: \$30,000.00, Avg. Cost: \$4,065.79, Special Price: (empty), Min. Price: 0.00, PKG Qty: 1, Points: 2500, Spiffs: 0.00.

An 'Attributes' form with three input fields. A red box labeled '7' encloses the Material and Material 2 fields. The fields and their values are: Disclaimer: (empty), Material: Leather, Material 2: Brass.

# CHAPTER THREE – INVENTORY

## SKUs > ADD A SPECIAL PRICE

To add a special price to a Sku first select the sku you intend to apply a special price to. The sku and its information will then be inserted into the bottom window, located on the far right side of this window you will select the **"SPECIAL PRICE"** field. Upon selecting this field, an *Auto Discount Rule Editor* window will be displayed.

### Quick Add Special Price

1. At the top of this window you will see a box labeled as **"QUICK ADD SPECIAL SALE PRICE"**. Here you will enter in the necessary information that is required to apply a special price to the selected sku.

Within quick add box you will see the first field located on the far left side labeled as **"SKU"**. This field will contain the sku number that you will be applying the special price to.

2. Located next to the sku field, will be the *Start Date* and *End Date* fields. Here you will allot dates for the time that the special price will be held for, select these fields to display a drop down menu from which you will select dates.
3. After selecting dates you will then key in the special price for the sku. This can be done by keying in the special price of the sku into the **"SPECIAL PRICE PER UNIT"** field located to the right of the start date and end date fields.
4. Next you will select the customer type that you would like to apply the special price to. To do so, select the **"CUSTOMER TYPE"** field to display a drop down menu, from this menu you will select the customer type that you would like to apply the special price to.
5. Once you have finished making your selections, select the **"ADD SPECIAL PRICE"** button, this will then insert the new rule into the bottom window.

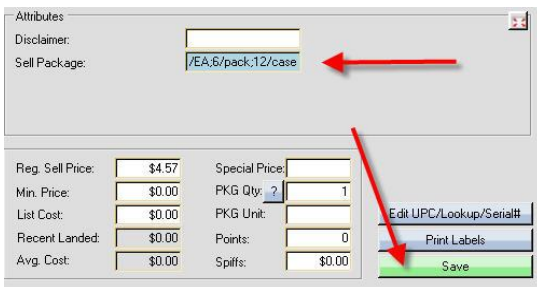
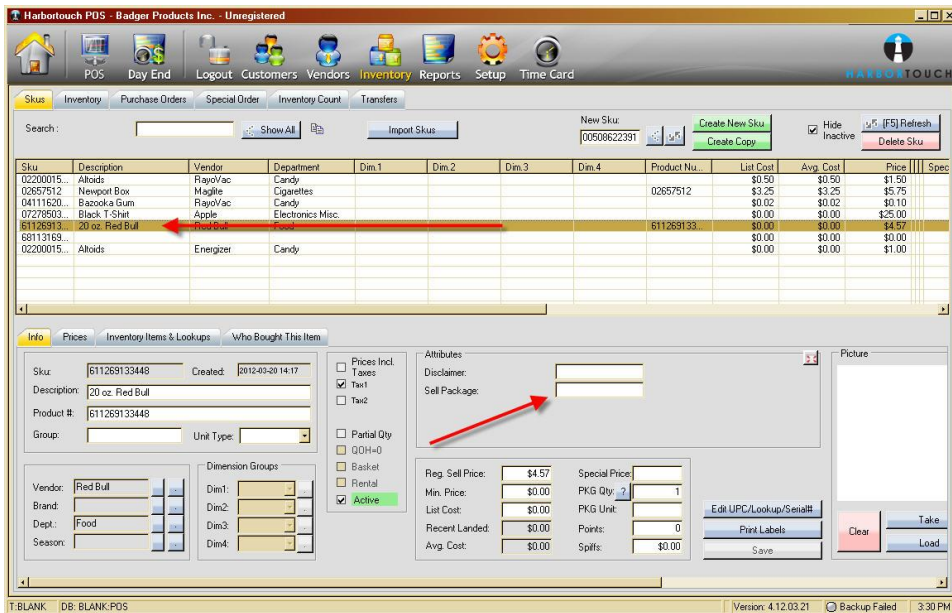
Rule Name	Special Price	Discount	Start Date	End Date	Apply To	Condition	Amount Qty	Clerk	Last Modify Date
Special Price for...	60.25	20.2	2008-07-...	2008-07-...	(Sku=1447 AND Customer Ty...		1	Chelsea...	2008-07-07 11:4...



# CHAPTER THREE – INVENTORY

## SKUs > ADDING INVENTORY TO SELL BY PACKAGE OR CASE

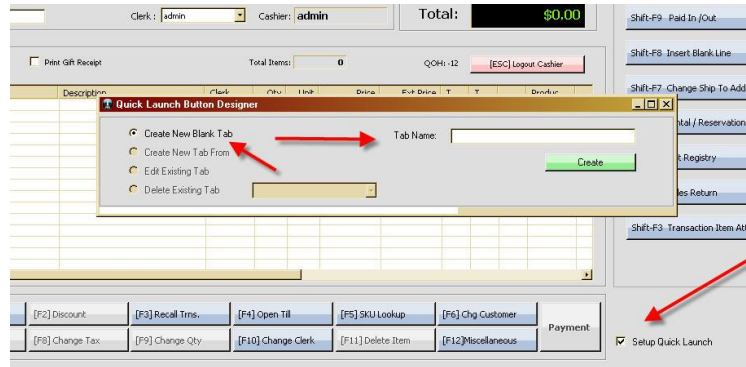
1. Begin by clicking on the **SETUP** Icon on the top of the screen then **GENERAL SETTINGS**.
2. We will first need to create an attribute. Begin by choosing Sku from the attribute drop down menu. For this example type “Sell Package” as the name of the attribute.
3. Press **UPDATE** when you are finished
4. We now need to assign the attribute we created to a Sku. Begin by clicking on **INVENTORY**.
5. Now click on **SKUS**.
6. Select the item you wish to assign the attribute to.  
If you need to add an item you can do so by following the steps adding sku’s and add the attributes.
7. In the box marked “Self Package” you will need to type the following 1/EA;6/pack;12/case. This will allow you to sell one 6 pack or a case of 12
8. Once you are finished press **SAVE**.



# CHAPTER THREE – INVENTORY

## SKUs > CREATING THE LAUNCH BUTTON

1. Begin by going to your sale screen. Select the Setup Quick Launch box on the bottom right of your screen.

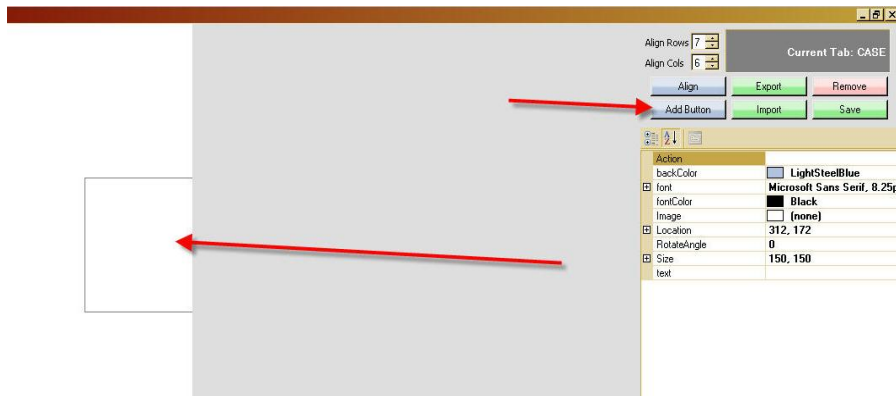


2. Select "Create New Blank Tab" Type in the name of your new tab. For this example we will be using "case". Once finished press create.



3. You will now see the button design screen. Begin by clicking on **ADD BUTTON** followed by the white box on the left side of the screen.

**Note:** You may move the button and change the size by left mouse clicking and drag the button.



## CHAPTER THREE – INVENTORY

### SKUs > CREATING THE LAUNCH BUTTON (continued)

- In the text box on the right type "case" (without quotes). The action box type past the following `{OemOpenBrackets}{Divide}CASE{OemCloseBrackets}`
  - Your page should look like the screen below.

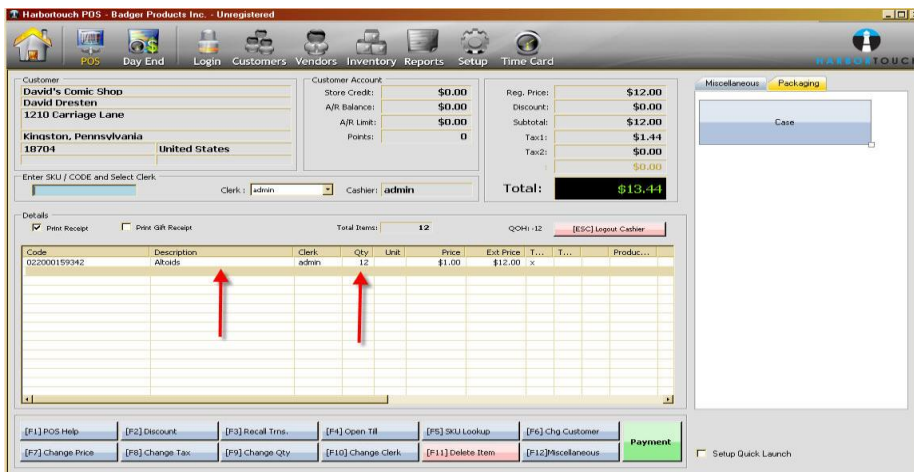
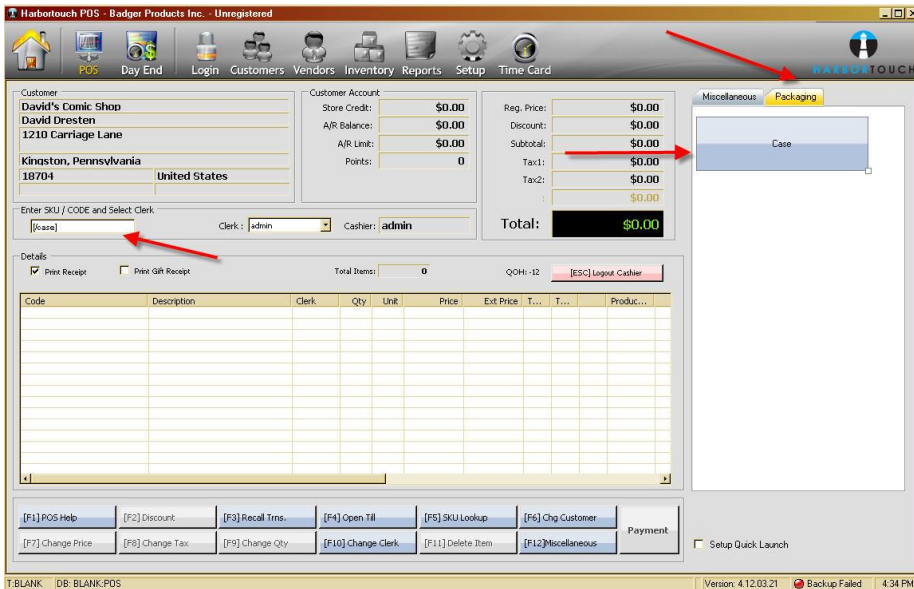


- Once you are finished press **SAVE**.

# CHAPTER THREE – INVENTORY

## SKUs > RUNNING A SALE BY PACKAGE OR CASE

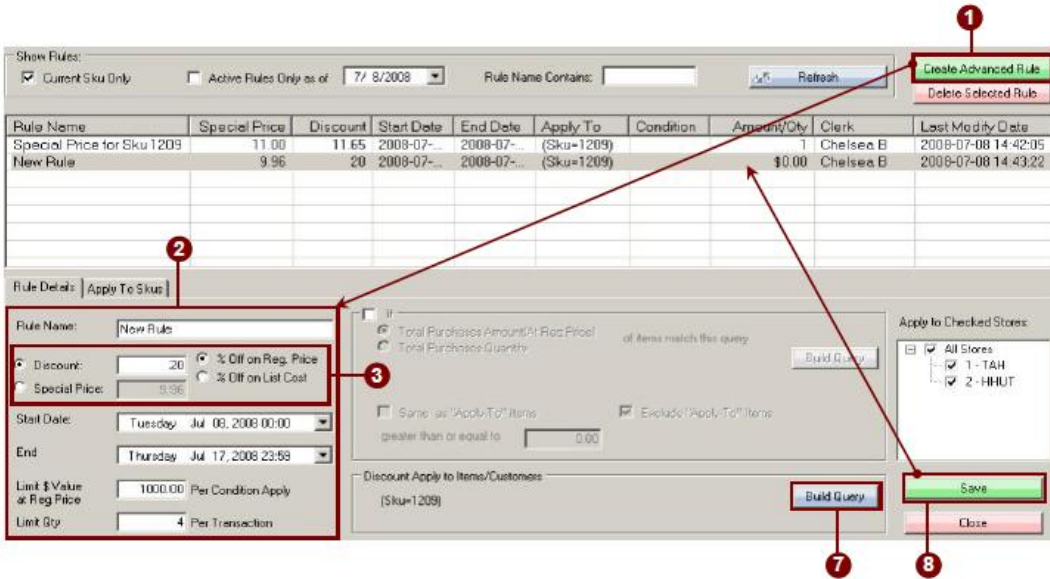
1. Begin by going to your sale screen and click on Packaging on the right hand side of the screen as shown in the image below. Notice how case appears in the SKU box.



2. The last step would be to scan the item.

# CHAPTER THREE – INVENTORY

## SKUs > CREATE ADVANCED RULE



1. To create an advanced rule, select the **“CREATE ADVANCED RULE”** button on the right side of the window.
- Upon selecting this button the bottom left side of the screen will become enabled. Here you will enter in the information required to create an advanced rule for the special price.
2. On the bottom left side of the window you will be on the tab labeled as **“RULE DETAILS”**. Within this box you will then see the first field at the top of the box, labeled **“RULE NAME”**, this field will contain the name of the rule you will be creating. If you would like to alter the rule name, key in a new name into the *Rule Name* field.
3. In the next two fields you will select from either *Discount* or *Special Price*, the choice you select will be applied to the sku. If you would like to apply a discount to the item select the **“DISCOUNT”** option. Upon selecting this option you will enable the **% off On Reg. Price** and **% Off On List Cost** options to the right of the field. Select either of these options then insert the percent that you would like to give off the item into the discount field.
- If you would like to apply a special price to the item, select the **“SPECIAL PRICE”** option. Upon selecting this option the special price field will then become enabled, here you will key in the special price of the item.
4. Once you have keyed in the Discount or Special price you will then select the dates that the special price will be held for. Located beneath the special price field you will see the **“START DATE”** and **“END”** fields, select these fields to view a drop down menu from which you will allot dates for the special price.

## CHAPTER THREE – INVENTORY

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### SKUs > CREATE ADVANCED RULE (continued)

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5. The next field will be labeled as Limit \$ Value at Reg. Price Per Condition Apply, here you will enter in the maximum value to be sold of the item. The first items within the \$ Value sold will apply to the special price.
6. Beneath this field you will see the Limit Qty, Per Transaction field. Here you will key in the maximum amount of items that will be sold for the special price per transaction. If the limit is 4 per transaction and the customer purchases 5, then only 4 of the items will be sold for the special price.
7. Once you have finished you will then be required to build a query. To do so select the **"BUILD QUERY"** button which is situated within the **"DISCOUNT APPLY TO ITEMS/CUSTOMERS BOX"**, to the right of the rule details box.
8. Once you have built your query and have entered in all the required information, select the **"SAVE"** button on the bottom right side of the window. This will then insert the new rule into the above screen.
9. Once you have built your query and have entered in all the required information, select the **"SAVE"** button on the bottom right side of the window. This will then insert the new rule into the above screen.

## CHAPTER THREE – INVENTORY

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### SKUs > MINIMUM PRICE

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This is where you can set a minimum price for an item. That is, this item cannot be discounted below this specified minimum price.

## CHAPTER THREE – INVENTORY

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### SKUs > POINTS

---

If you would like, you can assign a point system to all or certain items within your inventory. When a customer purchases items that contain points, the points will accumulate over time. Once the customer has accumulated a certain number of points, they can then use these points in a future purchase (a customer's accumulated points will be displayed within the customer info screen as well as the transaction window).

1. To apply points to an item, first select the sku you would like to apply points to, insert the sku into the bottom window. Upon enabling this window you will then select the Points field located on the far right side of the window, this will then display a **"CUSTOMER POINT RULE EDITOR"** window.
2. To add points in the Quick Add Points Value box, follow steps 1-5 of creating a quick add special price.
3. To Create Advanced Rule follow steps 1 through 8 (excluding steps 5 and 6) of creating an advanced rule.



## CHAPTER THREE – INVENTORY

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### SKUs > SPIFFS

---

If you wish to give commission to your staff members you can apply spiffs to certain sku's within your inventory. This way you can give an incentive dollar on your high end stock items when they are sold by a staff member.

1. To apply spiffs first select the item that you would like to apply a spiffs value to, this will insert the sku into the bottom window. Within the bottom window you will then select the **"SPIFFS"** field on the far right side of this window. Upon selecting this field a **"CLERKS SPIFF RULE EDITOR"** window will then be displayed.
2. To add spiffs in the Quick Add Spiff Value box, follow steps 1 through 5 of creating a quick add special price
3. To Create Advanced Rule follow steps 1 through 8 (excluding steps 5 and 6) of creating an advanced rule.

# CHAPTER THREE – INVENTORY

## SKUs > PRICES

1. Select the second tab over labeled; **“PRICES”** on the sku’s information window. Within this window, you will see any special prices that have been applied to the sku, as well as items that have been added to the basket if the selected sku is a basket. Within this window, there will be two boxes, these will be labeled as: Auto Discount Rules And Special Prices, and Basket Items.

Info **Prices** Inventory Items & Lookups | Who Bought This Item

Auto Discount Rules And Special Prices

Rule Name	Price	Active	Condition	Start Date	End Date
Special Price for Sku 1501	\$150.00			2008-06-2...	2008-06-26 ...
Special Price for Sku 1501	\$125.00	Y		2008-08-0...	2008-08-05 ...
Special Price for Sku 1501	\$110.00			2008-08-1...	2008-08-15 ...

Basket Items

Qty	ItemCode	Description	Unit Cost	Unit Price
1	1430	Front Ankle ...	\$7.85	\$15.45
1	1216	Blundstone ...	\$15.95	\$34.95
1	1317	Hunting Bre...	\$22.00	\$45.00
1	1446	Rhinestone ...	\$15.00	\$35.60

Item To Add:  Total Price: \$131.00  
Qty: 1 Total Cost: \$60.80  
 Sku Dnly Total Items: 4

Add/Edit Add Item Remove Item Clear All

Auto Discount Rules And Special Prices

Rule Name	Price	Active	Condition	Start Date	End Date
Special Price for Sku 1501	\$150.00			2008-06-2...	2008-06-26 ...
Special Price for Sku 1501	\$125.00	Y		2008-08-0...	2008-08-05 ...
Special Price for Sku 1501	\$110.00			2008-08-1...	2008-08-15 ...

Add/Edit

## CHAPTER THREE – INVENTORY

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### SKUs > AUTO DISCOUNT RULES AND SPECIAL PRICES

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On the bottom left side of the window, you will see an **“AUTO DISCOUNT RULES AND SPECIAL PRICES”** box. Displayed within this box will be any special prices that have been applied to the selected sku.

1. This window will display the Rule Name, Price, Active, Condition, Start Date and End Date. If the special price listed is currently active, there will be a Y displayed in the Active column.
2. To add or edit an existing special price, select the special price, then select the **“ADD/EDIT”** button at the bottom of the box. Upon selecting this button, an **“AUTO DISCOUNT RULE EDITOR”** window will be displayed. Here you can add or edit the special prices for the selected sku.

## CHAPTER THREE – INVENTORY

### SKUs > BASKET ITEMS

1. On the right side of this window, you will see a box labeled; Basket Items, (this box will only become enabled if you have checked the basket checkbox on the sku info tab).

*\*To create a basket you will need to create a sku that you will assign as a basket. On the sku info tab, check the basket checkbox to create a basket. Upon checking this checkbox, the List Cost, Recent Landed and Avg. Cost fields will disappear. You will then key in the price for the basket into the Reg. Sell Price field.*

2. To add items to the basket, key in the sku into the **"ITEM TO ADD"** field. Once you have finished select the **"ADD ITEM"** button, the item will then be inserted into the top window.
3. To remove an item from the basket, first select the item you would like to remove, then select the **"REMOVE ITEM"** button (to clear the entire list, select the **"CLEAR ALL"** button).
4. On the right side of the window the *Total Price*, *Total Cost*, and *Total Items* will be displayed. These fields will be disabled and will be automatically updated as you add items to the basket.

**Note: Press enter after inserting the sku to enable the Add Item button.**

The screenshot shows a window titled "Basket Items" with a table and summary fields. The table contains the following data:

Qty	ItemCode	Description	Unit Cost	Unit Price
1	1430	Front Ankle ...	\$7.85	\$15.45
1	1216	Blundstone ...	\$15.95	\$34.95
1	1317	Hunting Bre ...	\$22.00	\$45.00
1	1446	Rhinestone ...	\$15.00	\$35.80

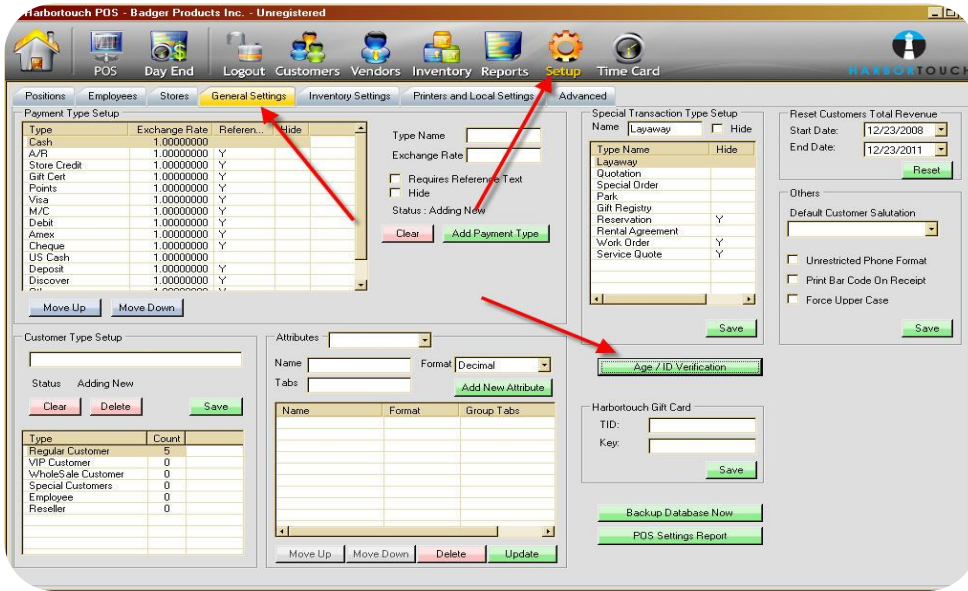
Below the table are the following fields and buttons:

- Item To Add:** A text input field with a red callout 1 pointing to it.
- Qty:** A spinner box with the value "1".
- Sku Only**
- Add Item** (green button)
- Remove Item** (red button)
- Clear All** (red button)
- Total Price:** \$131.00 (with a red callout 2 pointing to it)
- Total Cost:** \$60.80
- Total Items:** 4 (with a red callout 3 pointing to it)

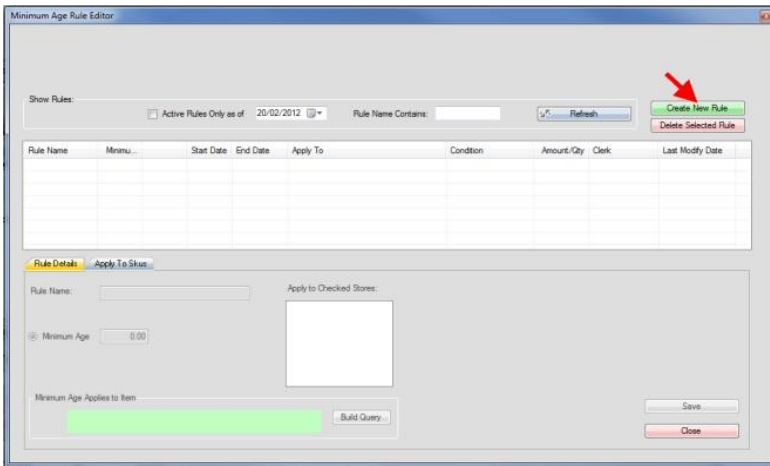
# CHAPTER THREE – INVENTORY

## SKUs > ENABLE AGE VERIFICATION

To enable and setup age verification, first log into the system, and then access the setup menu, then select the GENERAL SETTING tab, and then press ID/AGE VERIFICATION.



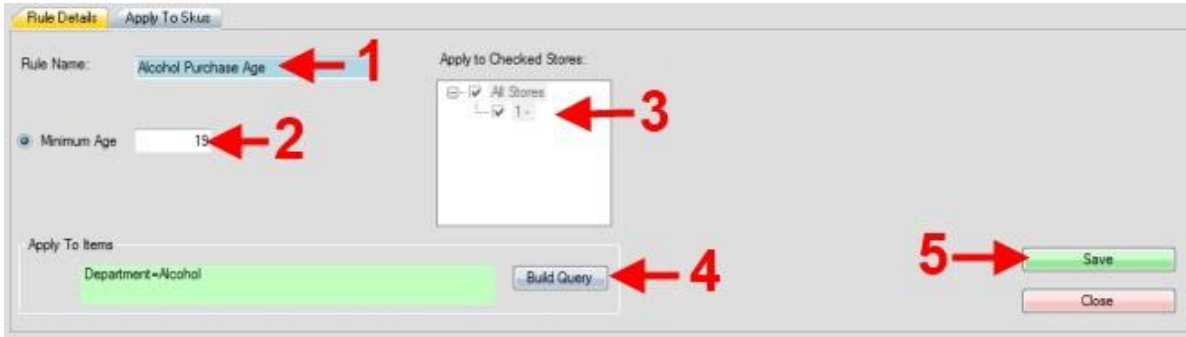
This opens up the **Minimum Age Rule Editor** window. To set up a new minimum age rule, press **CREATE NEW RULE** and a new blank rule will appear in the lower part of the screen.



Enter the new age rule's details.

# CHAPTER THREE – INVENTORY

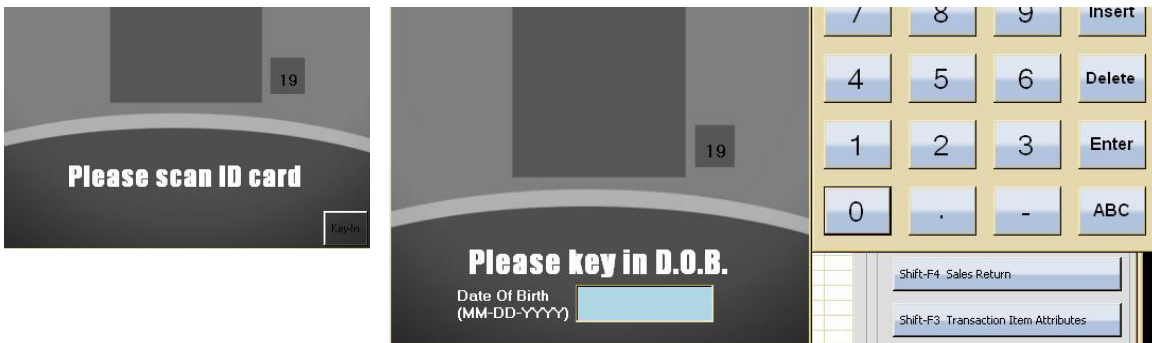
## SKUs > ENABLE AGE VERIFICATION



An example of a rule named "Alcohol Purchase Age" which requires anyone purchasing items from the "alcohol" department to be at least 19 years old.

1. Type in a name for the age rule.
2. Enter the minimum age you wish to apply to the rule.
3. Select which stores are included in your rule, if applicable.
4. Build a query (see Building a Query) to determine which items the rule will be applied to.
5. Save your new rule.

When an item with an age verification rule applied to it is purchased, as soon as the payment button is selected a window will pop up asking for an ID scan (You must swipe the ID). The ID must match the minimum age set in your rule (displayed in the small box on the scan popup) or the purchase will not go through. You must swipe the driver's license or press the "key-in" located in the bottom right corner.



# CHAPTER THREE – INVENTORY

## IMPORTING A .CSV INVENTORY FILE > ASSIGNING VENDORS &

**NOTE: YOU MUST FIRST ASSIGN VENDORS AND DEPARTMENTS ON THE POS SYSTEM BEFORE IMPORTING AN INVENTORY .CSV FILE.**

1. Begin by logging into the POS.
2. Click on the “Vendors” Icon on the top of the screen.
3. Enter the information for your first vendor. Once you are completed press the save changes button on the bottom right hand corner of the screen.
4. You will need to repeat the process for each vendor you have.

Vendor List

Search:  Show All Import Vendors  Hide Inactive Refresh Show Contact List Print / Export

Vendor Name	Alias	City	Prov/State	Country	Email	Phone 1	Phone 2	Fax			
Apple			Pennsylvania	United States							
Energizer			Pennsylvania	United States							
Maglite	lori		Pennsylvania	United States							
microsoft	MSF		Pennsylvania	United States							
Nebo			Pennsylvania	United States							
RayoVac			Pennsylvania	United States							
Red Bull			Pennsylvania	United States							

Vendor Info More... PO Payable

Identity Vendor:  Alias:

Vendor Contact Info Primary Phone:  Secondary Phone:  Fax:  Email:   Mailing List Subscriber Website:

Account Number:  Address:  City:  Country:  Province / State:  Postal/Zip:  Map  Active Cancel Save Changes

Defaults Exchange Rate: 1.0000 (Foreign Rate = % Amount) Discount: 0 \$0.00 Extra: 0 \$0.00 Shipping: 0 \$0.00 Duty: 0 \$0.00 Misc: 0 \$0.00

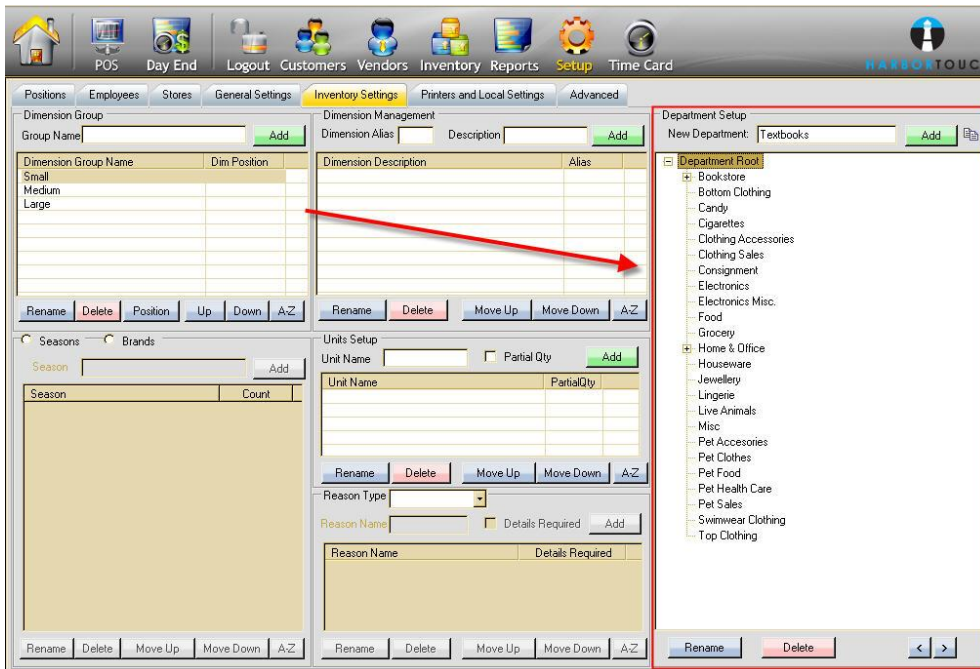
Contact Name:  Email:  Primary Phone:  Secondary Phone:  Cell Phone:  Fax:  Save Contact

Delete Contact New Contact Brand Attached:  Attach Brand to Contact >> Remove Selected Brand from Contact <<

# CHAPTER THREE – INVENTORY

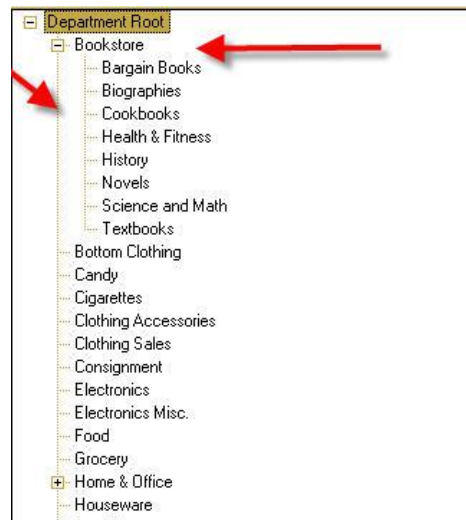
## IMPORTING A .CSV INVENTORY FILE > SETTING UP DEPARTMENTS

1. Log into the system and then access
2. Select the **Setup** tab near the top of the screen.
3. Location of departments.



4. Your department will be created depending on which root you have selected.

Example: If DEPARTMENT ROOT is selected and you create a department called Bookstore, it will be created under DEPARTMENT ROOT. Then, if you click to select Bookstore, you can create a department with Bookstore selected to create a sub-department for that, etc.





## CHAPTER THREE – INVENTORY

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### IMPORTING A .CSV INVENTORY FILE > SETTING UP DEPARTMENTS

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Departments Overview:

1. To the right of NEW DEPARTMENT, type in the name of the department you wish to create.
2. Click ADD to finalize the creation of the department.

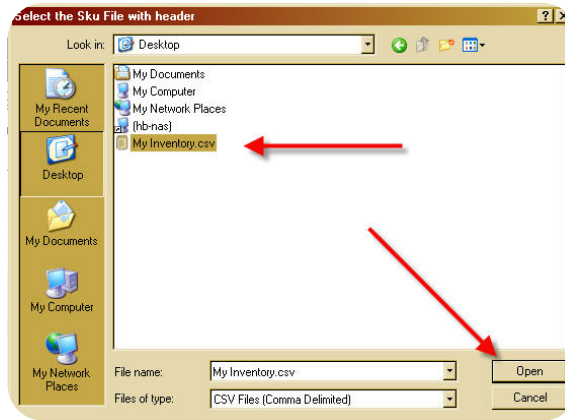
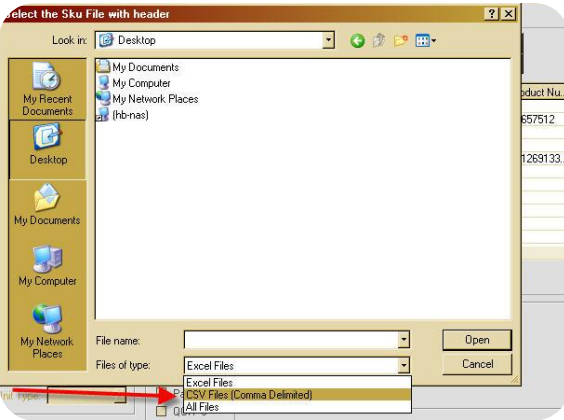
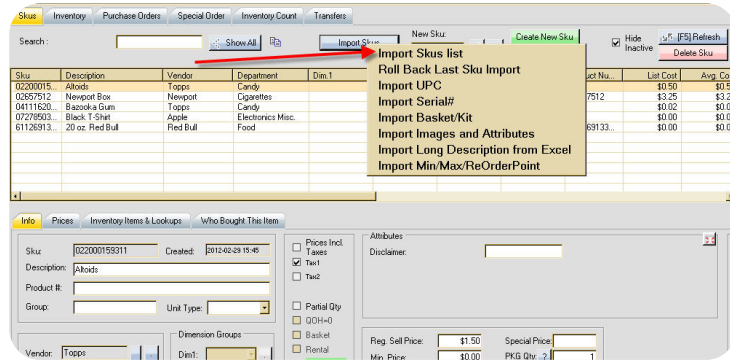
(After creating a new department, make sure that you enter an account for that department into your general ledger settings)



# CHAPTER THREE – INVENTORY

## IMPORTING A .CSV INVENTORY FILE > IMPORTING THE .CVS INVENTORY FILE

1. Save your excel sheet as a CSV.
2. Log in as Admin on the POS.
3. Click on **INVENTORY**.
4. Click on **IMPORT SKUS**.



5. Once you see the following screen, press **OK**.



# CHAPTER THREE – INVENTORY

## INVENTORY ITEMS AND LOOKUPS

1. Once you have finished keying in the sku's information select the third tab over labeled **"INVENTORY ITEMS AND LOOKUPS"**. Here you can view all the dimensions of the selected sku. Within this screen you can view the Monthly Sold Quantity, Edit Selected Items, Edit UPC Lookups, View the Sku Activity as well as search for a preferred item code to view.

Displayed within this window you will view several columns labeled as; Sku, Description, Quantity on Hand, Sold Quantity, Quantity On Order and so on. The totals of each of these columns displayed will be shown in the last row labeled as **"TOTAL"**, this row will be colored grey.

2. To search for a particular dimension or category, insert a keyword into the **"SEARCH"** field that is located at the top of this window. Upon inserting a keyword into the field, the item matching the typed keyword will then be highlighted.
3. If you would like to view all items that match the typed keyword select the **"SHOW ALL"** button located next to the *Search* field. This will display a pop up window listing all the items that match the existing keyword.
4. To narrow down the list you can choose from the two options displayed at the bottom of this window. These options will be displayed as; *Show All Stores* and *Show All Dims*, check the checkbox next to either option.

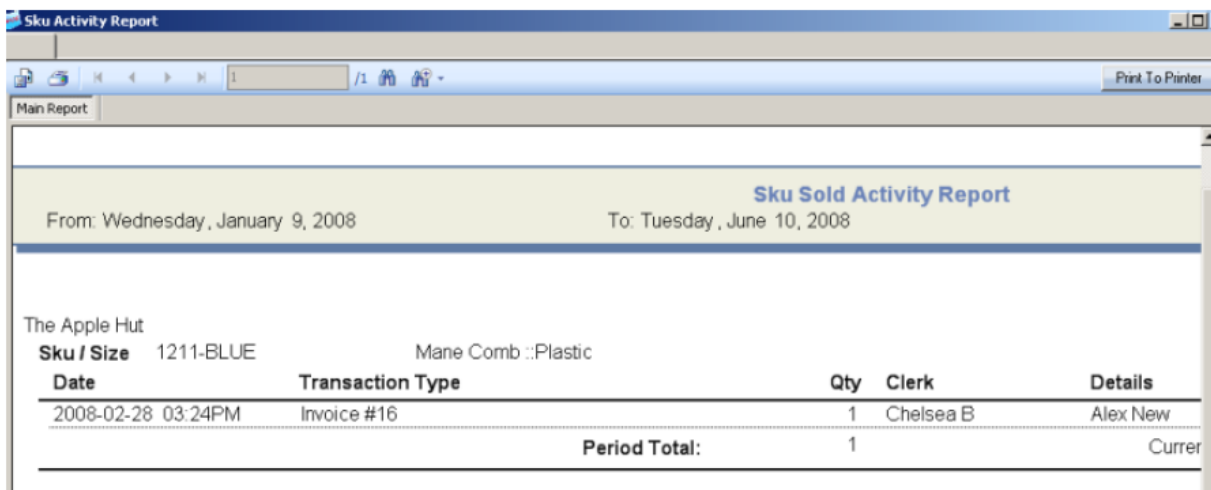
Sku	Dim.1	D.	D.	Store	Description	Vendor	Department	Product ...	In Store Loc...	DOH	SOLD	C...	QOO	SO/...	QT...	RE...	TR...	O...
1209	RED			TAH	Brush Tote	Trotters	07-Groomi...	BT-35249	Receiving	1	0	0	0	0	0	1	0	0
1209	BLUE			TAH	Brush Tote	Trotters	07-Groomi...	BT-35249	Up Stock	1	0	0	0	0	0	1	0	0
1209	GRN			TAH	Brush Tote	Trotters	07-Groomi...	BT-35249	Receiving	1	0	0	0	0	0	1	0	0
1209	BLK			TAH	Brush Tote	Trotters	07-Groomi...	BT-35249	Warehouse	0	2	0	0	0	0	2	0	0
<b>Total:</b>										3	2	0	0	0	0	5	0	0

# CHAPTER THREE – INVENTORY

## SKU ACTIVITY

1. In the Sku Activity box located on the upper right side of the window, you can view an On Hand Activity Report for the selected sku.
2. First select a date in the From and To date fields. These will be displayed in the drop down menu's from which you can allot dates that you would like to view the report.
3. After you have allotted dates, you will select a transaction type. Located to the right of the date fields, you will select the enabled field to view a drop down menu, this menu will display the transaction types you can choose from. When you have finished making your selections, select the **"VIEW"** button to view the activity report.

A Sku Activity Report window will be displayed. This window will display the Date, Transaction Type, Qty, Clerk and Details. The Period Total will be shown at the bottom of the report displaying the Current On Hand Levels.



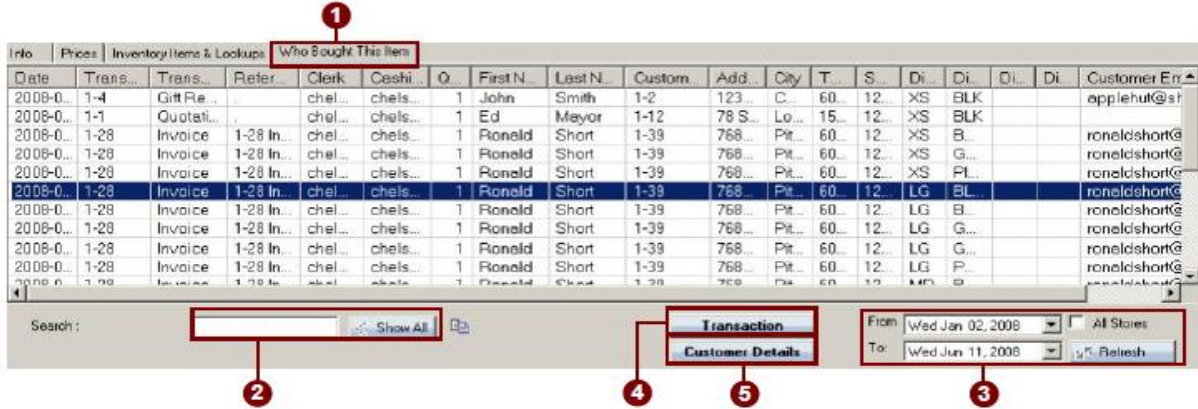
The screenshot shows a window titled "Sku Activity Report" with a toolbar and a "Print To Printer" button. The report content is as follows:

Sku Sold Activity Report					
From: Wednesday, January 9, 2008			To: Tuesday, June 10, 2008		
The Apple Hut					
Sku / Size 1211-BLUE		Mane Comb ::Plastic			
Date	Transaction Type	Qty	Clerk	Details	
2008-02-28 03:24PM	Invoice #16	1	Chelsea B	Alex New	
Period Total:		1		Curren	

# CHAPTER THREE – INVENTORY

## MONTHLY SOLD QUANTITY

1. Select the monthly sold quantity button to bring up a monthly sold window.
2. This window displays the sold quantity by month. It will show the Code, Store, This Year, Last Year, Percent, and the current month of last year to the current month of the current year.



3. Select the fourth tab over located to the right of the *Inventory Items and Lookups* tab, labeled **“WHO BOUGHT THIS ITEM”**. In this screen you can view the customers that have purchased the selected sku.

This window will display columns labeled as; *Date, Transaction #, Clerk, Cashier, Sku, Dimensions* and so on.

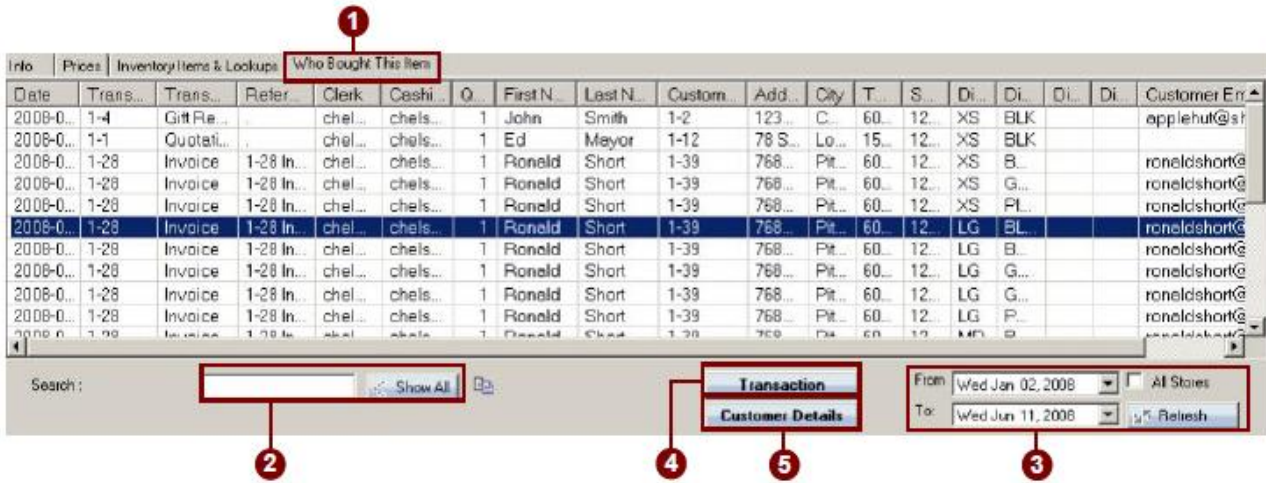
4. If you wish to search for a particular code or customer, insert a keyword into the search field at the bottom of the screen. After inserting a keyword select the **“SHOW ALL”** button. This will display a popup window showing the transaction that contains the typed keyword.
5. To narrow down your search you can select dates from the **“TO”** and **“FROM”** fields, and check or uncheck the checkbox next to *All Stores*. Once you have made your choices select the **REFRESH** button to load up a new list.
6. If you would like to view a particular transaction, first select the transaction you would like to view. Once you have selected the transaction, select the **“TRANSACTION”** button located at the bottom of the window. This will display an *Invoice* window, here you will view the selected transaction. In this window you can *Print a Return Auth, Print Gift Receipt, and Re-Print* the transaction.
7. To view the customer’s information of the chosen transaction first select the transaction from the *Who Bought This Item* window, of the customer you would like to view. Once you have selected the customer you would like to view, select the **“CUSTOMER DETAILS”** button located at the bottom of the window.

# CHAPTER THREE – INVENTORY

## MONTHLY SOLD QUANTITY

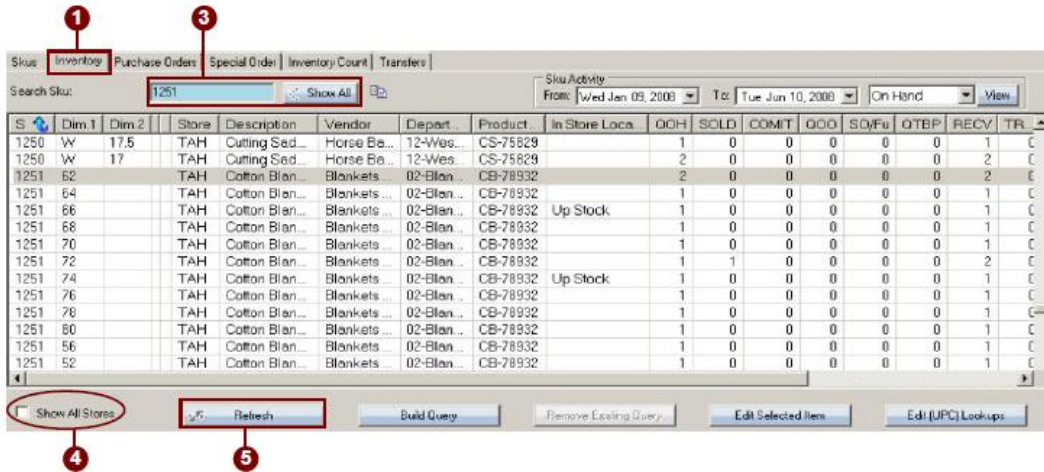
8. Upon selecting this button, a view customer window will then be displayed, this window will display three tabs labeled as Customer Info, Attributes and More.

**Note: It may take a few seconds for the transaction report to generate, please be patient.**



# CHAPTER THREE – INVENTORY

## INVENTORY



1. To view your stores inventory, select the second tab over on the inventory screen labeled as **"INVENTORY"**.
2. This screen will display all your *On Hand inventory*, this will display each item code that you have within your stores inventory. The *Sku, Dimensions, Description, QOO, Sold, Comit, QOO* and so on, of these items will also be displayed in the labeled columns.  
*Within this screen you can also view Sku Activity Reports, Build A Query, Edit Selected Items and Edit (UPC) Lookups, as well as search items within your store and within your other stores.*
3. To search for an inventory item, you can insert a keyword into the **"SEARCH"** field at the top of the screen. Once inserting the keyword into the search field, the matching sku will then be highlighted.  
*If you would like to view all item codes that match the typed keyword, select the **"SHOW ALL"** button located to the right of the search field. Upon selecting this option a Search Results window will be displayed listing all the item codes that match the typed keyword, from this window you can select the desired sku to view.*
4. Located at the bottom of the Inventory window you will see an option labeled as **"SHOW ALL STORES"**. You can check or uncheck this checkbox to display items from either your store only or items from all your stores.
5. After selecting the show all stores checkbox, select the **"REFRESH"** button to load up a new list.
6. If you would like to edit an item, first select the item you would like to edit then select the Edit Selected Item button located at the bottom of the screen. Following the selection of this option an Edit Inventory window will be displayed, here you can adjust the stocking quantities, store location and adjust the quantity on hand.

## CHAPTER THREE – INVENTORY

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### INVENTORY (continued)

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7. To edit a UPC lookup, first select the sku that you would like to adjust the UPC lookups for, and then select the Edit (UPC) Lookups button located on the bottom right side of the window. This will display an Add / Edit Item Look-ups window. Here you can key in the required information to edit a lookup.



# CHAPTER THREE – INVENTORY

## INVENTORY > VIEW SKU ACTIVITY

1. To view a sku's activity you will select the desired options from the *Sku Activity* box located in the upper right corner of the screen.
2. Once you have selected your options you will select the *View* button to display a *Sku Activity Report*.

The screenshot shows a web browser window titled 'Sku Activity Report'. The main content area displays a report titled 'Sku On Hand Activity Report' for 'The Apple Hut'. The report covers the period from Wednesday, January 9, 2008, to Tuesday, June 10, 2008. The specific item is '1200-50-BLUE Summer Sheet.:Cotton'. The report shows a single transaction on 2008-02-28 at 03:09PM, which is a purchase order for quantity 1, processed by clerk Chelsea B, with details for Bridle Shop. A period total of 1 is shown at the bottom of the table.

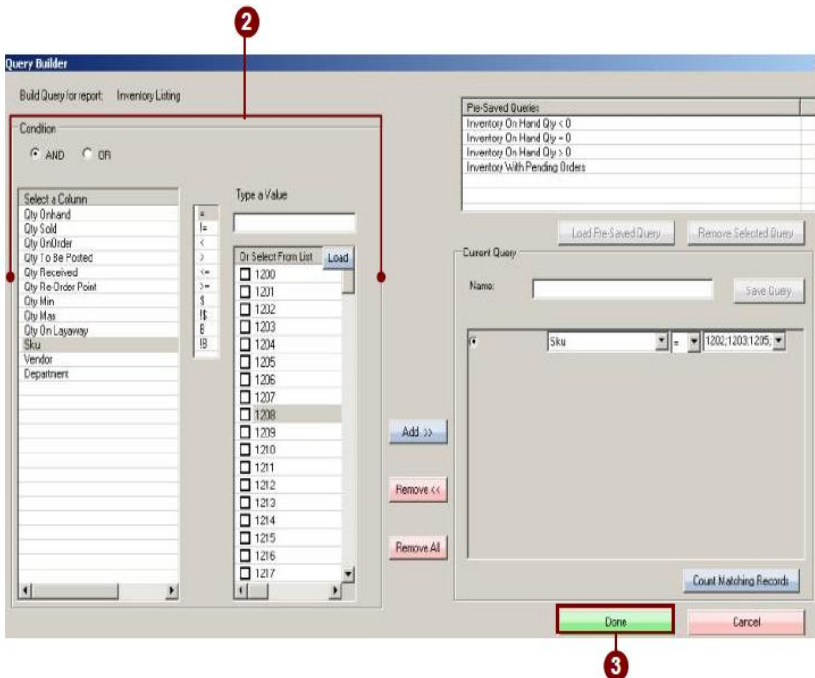
Date	Transaction Type	Qty	Clerk	Details
2008-02-28 03:09PM	Purchase Order#AH-6552	1	Chelsea B	Bridle Shop
Period Total:		1		Current Or

# CHAPTER THREE – INVENTORY

## INVENTORY > BUILD A QUERY

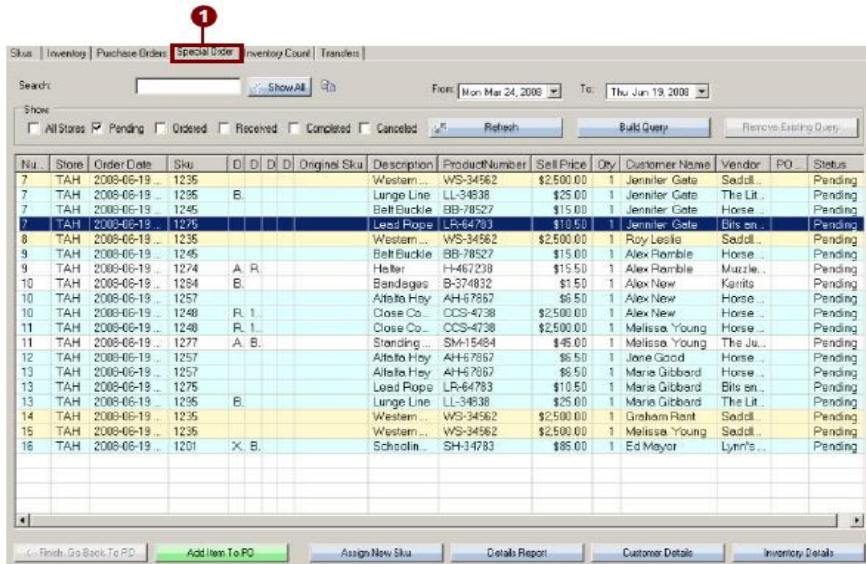
To build a query, select the **“BUILD QUERY”** button situated at the bottom of the *Inventory* screen.

1. Following the selection of this option a *Query Builder* window will then be displayed. Here you can build a query for a more detailed report.
2. Here you will select your choices from each of the three columns displayed.
3. Once you have selected your choices, select **“ADD”**, and then select the **“DONE”** button on the bottom right side of the screen.
4. You will then arrive back at the Inventory screen where your selected query will be displayed.
  - To remove an existing query select the **REMOVE EXISTING QUERY** button at the bottom of the screen.
  - To re-load your inventory list select the Refresh button at the bottom of the screen.



# CHAPTER THREE – INVENTORY

## INVENTORY > SPECIAL ORDERS



1. To view, add or edit your special orders, select the fourth tab over on the inventory screen labeled **“SPECIAL ORDER”**.

This screen will display each item within the customers special order transaction. The special order items will be matched by their number.

2. Within this screen you will see the *Number, Order Date, Sku, Sell Price, Qty, Customer Name, Status* and so on within the labeled columns. Within this window you can search for a particular special order, build a query, assign a new sku, view a details report, view customer details as well as inventory details.

The Special Orders displayed within this screen will be color coordinated according to their on hand quantity.

3. If the special order is highlighted **“YELLOW”**, this means that the quantity on hand was below the requested quantity and the item has been ordered; therefore once you have received the item the quantity on hand will satisfy the requested quantity of the selected item.
4. If the special order is highlighted **“WHITE”**, this means that the quantity on hand is below the requested quantity; therefore you will need to order the selected item in order to satisfy the requested amount.
5. If the special order is highlighted **“BLUE”**, this means that the quantity on hand satisfies the requested quantity; therefore you do not need to order the requested item.

# CHAPTER THREE – INVENTORY

## INVENTORY > SPECIAL ORDERS (continued)

- If you would like search for a special order, key in a keyword into the **“SEARCH”** field located at the top of the special order screen. Once you have typed in a keyword, the matching order will then be highlighted.

Select the **“SHOW ALL”** button to view a popup window listing all orders that contain the typed keyword.

- To allot dates in which to view special orders, select the dates from the **“FROM”** and **“TO”** fields to the right of the search field.
- Once you have allotted dates, select the **“REFRESH”** button located beneath the “from and to” date fields. Subsequent to selecting this option, a new list will be loaded displaying the orders made between the allotted dates.

Search Number:

From:  To:

Search:    From:  To:

Show:  All Stores  Pending  Ordered  Received  Completed  Canceled

Nu...	Store	Order Date	Sku	D	D	D	Original Sku	Description	Product Number	Sell Price	Qty	Customer Name	Vendor	PO ...	Status
7	TAH	2008-06-19 ...	1235					Western ...	WS-34562	\$2,500.00	1	Jennifer Gate	Saddl...		Pending
7	TAH	2008-06-19 ...	1295	B				Lunge Line	LL-34838	\$25.00	1	Jennifer Gate	The Lit...		Pending
7	TAH	2008-06-19 ...	1245					Belt Buckle	BB-78527	\$15.00	1	Jennifer Gate	Horse ...		Pending
7	TAH	2008-06-19 ...	1275					Lead Rope	LR-64783	\$10.50	1	Jennifer Gate	Bits an...		Pending
8	TAH	2008-06-19 ...	1235					Western ...	WS-34562	\$2,500.00	1	Roy Leslie	Saddl...		Pending
9	TAH	2008-06-19 ...	1245					Belt Buckle	BB-78527	\$15.00	1	Alex Ramble	Horse ...		Pending
9	TAH	2008-06-19 ...	1274	A	R			Halter	H-467238	\$15.50	1	Alex Ramble	Muzzle...		Pending
10	TAH	2008-06-19 ...	1264	B				Bondages	B-374832	\$1.50	1	Alex New	Kerrits		Pending
10	TAH	2008-06-19 ...	1257					Alfalfa Hay	AH-67867	\$6.50	1	Alex New	Horse ...		Pending
10	TAH	2008-06-19 ...	1248	R	1			Close Co...	CCS-4738	\$2,500.00	1	Alex New	Horse ...		Pending
11	TAH	2008-06-19 ...	1248	R	1			Close Co...	CCS-4738	\$2,500.00	1	Melisse Young	Horse ...		Pending
11	TAH	2008-06-19 ...	1277	A	B			Standing ...	SM-15484	\$45.00	1	Melisse Young	The Ju...		Pending
12	TAH	2008-06-19 ...	1257					Alfalfa Hay	AH-67867	\$6.50	1	Jane Good	Horse ...		Pending
13	TAH	2008-06-19 ...	1257					Alfalfa Hay	AH-67867	\$6.50	1	Maria Gibbard	Horse ...		Pending
13	TAH	2008-06-19 ...	1275					Lead Rope	LR-64783	\$10.50	1	Maria Gibbard	Bits an...		Pending
13	TAH	2008-06-19 ...	1295	B				Lunge Line	LL-34838	\$25.00	1	Maria Gibbard	The Lit...		Pending
14	TAH	2008-06-19 ...	1235					Western ...	WS-34562	\$2,500.00	1	Graham Part	Saddl...		Pending
15	TAH	2008-06-19 ...	1235					Western ...	WS-34562	\$2,500.00	1	Melisse Young	Saddl...		Pending
16	TAH	2008-06-19 ...	1201	X	B			Schoolin...	SH-34783	\$95.00	1	Ed Mayor	Lynn's ...		Pending

# CHAPTER THREE – INVENTORY

## INVENTORY > SPECIAL ORDERS (continued)

### VIEWING SPECIAL ORDERS

1. To view the status of your special orders, you can check the checkboxes next to any of the six options displayed in the **“SHOW”** box located at the top of the special order window.
2. These options are labeled as; *All Stores, Pending, Ordered, Received, Completed, and Canceled*.
3. Once you have selected your desired choices, select the **“REFRESH”** button to the right of this box. Upon select this option a new list will be loaded displaying the special orders containing the chosen statuses. The status of each special order will be displayed in the **“STATUS”** column of the special order window.

The screenshot shows a software interface for viewing special orders. At the top, there is a 'SHOW:' section with a row of checkboxes: 'All Stores', 'Pending', 'Ordered', 'Received', 'Completed', and 'Canceled'. A red box labeled '1' highlights these checkboxes. To the right of these checkboxes is a 'Refresh' button, highlighted by a red box labeled '3'. Below the filter section is a table with columns: Num..., Store, Order Date, Sku, O., Description, Product..., Sell Price, Qty, Customer Name, Ven..., and Status. The table contains 16 rows of order data. At the bottom of the window, there are several buttons: '<- Finish, Go Back To PO', 'Add Item To PO', 'Assign New Sku', 'Details Report', 'Customer Details', and 'Inventory Details'.

Num...	Store	Order Date	Sku	O.	Description	Product...	Sell Price	Qty	Customer Name	Ven...	Status
2	TAH	2009-04-2...	1254		Mane Pull...	MPC-78...	\$2.50	1	Ed Mayor	Hor...	Canceled
2	TAH	2009-04-2...	1325	B	Tendon B...	TB-467...	\$55.75	1	Ed Mayor	Sed...	Canceled
7	TAH	2009-06-1...	1235		Western ...	WS-345...	\$2,500.00	1	Jennifer Gate	Sed...	Pending
8	TAH	2009-06-1...	1235		Western ...	WS-345...	\$2,500.00	1	Roy Leslie	Sed...	Pending
9	TAH	2009-06-1...	1245		Belt Buckle	EB-78527	\$15.00	1	Alex Randle	Hor...	Pending
10	TAH	2009-06-1...	1294	B	Bondages	B-374832	\$1.50	1	Alex New	Kerri...	Pending
10	TAH	2009-06-1...	1254	1...	Alfalfa Hay	MPC-78...	\$6.50	1	Alex New	Hor...	Pending
10	TAH	2009-06-1...	1248	R	Close Co...	CCS-47...	\$2,500.00	1	Alex New	Hor...	Pending
11	TAH	2009-06-1...	1248	R	Close Co...	CCS-47...	\$2,500.00	1	Melissa Young	Hor...	Pending
11	TAH	2009-06-1...	1277	A	Standing ...	SM-154...	\$45.00	1	Melissa Young	The ...	Pending
12	TAH	2009-06-1...	1211	B	Mane Co...	MC-348...	\$3.45	1	Jane Good	Hap...	1 Received
12	TAH	2009-06-1...	1248	R	Close Co...	CCS-47...	\$2,500.00	1	Jane Good	Hor...	1 Received
13	TAH	2009-06-1...	1254	1...	Alfalfa Hay	MPC-78...	\$6.50	1	Maria Gibbard	Hor...	1 Received
14	TAH	2009-06-1...	1235		Western ...	WS-345...	\$2,500.00	1	Graham Rent	Sed...	Pending
15	TAH	2009-06-1...	1214	1...	Western ...	GSR-34...	\$2,500.00	1	Melissa Young	Kerri...	1 Received
16	TAH	2009-06-1...	1235	1...	Schoolin...	EFB-6767	\$65.00	1	Ed Mayor	The ...	1 Received

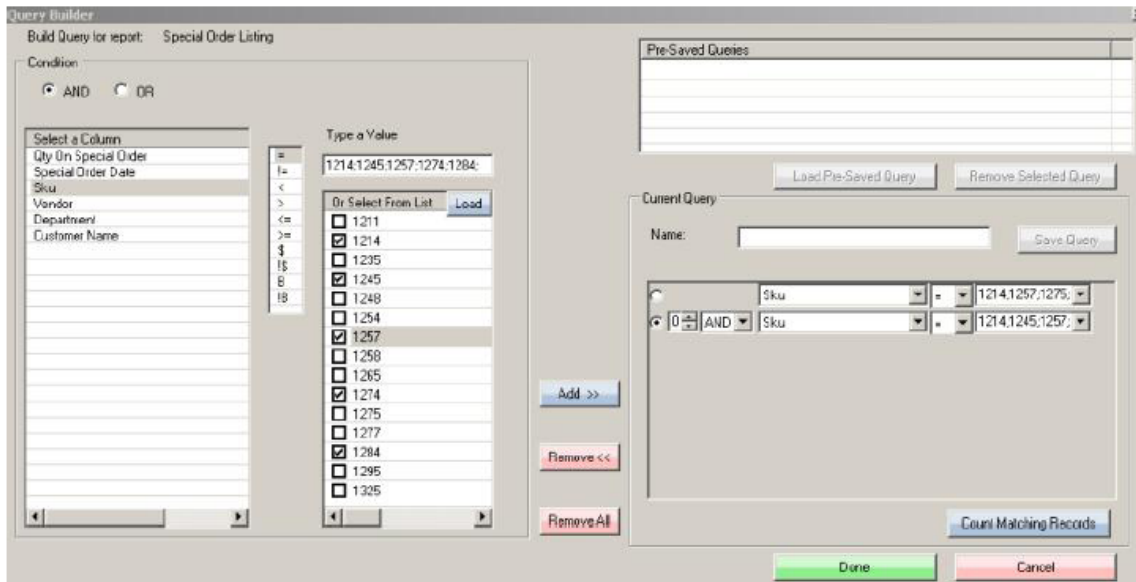
# CHAPTER THREE – INVENTORY

## INVENTORY > SPECIAL ORDERS (continued)

### VIEWING SPECIAL ORDERS (continued)

4. Select the **"BUILD QUERY"** button at the top of the special order screen to build a query for a selected special order.
5. A *Query Builder* window will then be displayed, from here you can select from; Qty On Special Order, Special Order Date, Sku, Vendor, Department and Customer Name.

\*If there is an existing query and you wish to remove it you can select the **"REMOVE EXISTING QUERY"** button at the top of the special order screen.



## CHAPTER THREE – INVENTORY

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### INVENTORY > ADD ITEM TO PURCHASE ORDER

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1. To add a selected item to a purchase order, first select the item you wish to add, then select the **“ADD ITEM TO PO”** button on the bottom left side of the special order window. This button will only become enabled if you have selected a special order that is pending.

\*You cannot add special orders that have been canceled, received, completed or ordered.

2. Once you have selected this button, the selected special order will be added to the current purchase order. The **“Add Item To PO”** button will then become disabled for the selected special order.

\*If there is no current purchase order, a note will be in place of the Add Item To PO button stating that there is No Current Purchase Order.

**Note: There must be a current purchase order to add the special order to.**



## CHAPTER THREE – INVENTORY

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### INVENTORY > ASSIGN NEW SKU

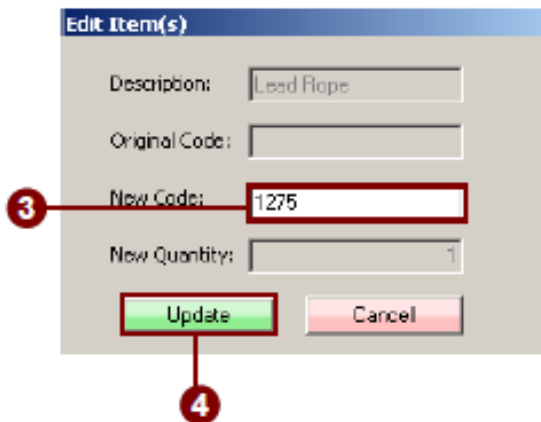
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#### ASSIGN NEW SKU

1. To assign a new sku to a special order, first select the original sku you would like to change. Once you have selected a sku, select the **“ASSIGN NEW SKU”** button located at the bottom of the special order screen.

\*You must first select the item you wish to assign a new sku to in order to enable this function.

2. After selecting this button, an edit item window will then be displayed.
3. Enter the new code into the **“NEW CODE”** field and press **“ENTER”**.  
\*Press enter after inserting the new code to enable the update button.
4. After you have inserted the new code into the enabled field, you will then either press enter again or select the **“UPDATE”** button located at the bottom of the edit item(s) window.
5. This will then insert the new sku into the special order window. You will view the new sku in the *SKU* column and the original sku in the *Original* column.



## CHAPTER THREE – INVENTORY

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## INVENTORY > DETAILS REPORT

1. To view a details report first select the special order you would like to view. Next you will select the **"DETAILS REPORT"** button at the bottom of the screen.
2. This will display an invoice window showing the special order.
3. This report will display all the current special orders of the customer whose special order you selected.
4. From here you can print out the details report if needed.

Apple Hut  
12345 Main St., Vancouver, British Columbia, H2J 7G8  
Tel: 604-548-6958 Fax: 604-526-5845  
GST #: RT12345

**SPECIAL ORDER**

DATE: 06/19/2008 10:51 am  
NUMBER: 7  
Page 1 of 1

S The Jumper Palace  
O Gate, Jennifer  
L 42389 Hope Rd  
D Hope, British Columbia  
K3D 4K8 Canada  
T Tel: 604-239-9584 Fax:

S The Jumper Palace  
H Gate, Jennifer  
I 42389 Hope Rd  
P Hope, British Columbia  
K3D 4K8 Canada  
T  
O

Sales Person	Customer I.D.	PO Number
chelsea	42	

Code	Description	Qty	Taxable	Price	Ext Price
1235	Western Saddle	1	0 P	\$2,500.00	\$2,500.00
1295-ELK	Lunge Line	1	0 P	\$25.00	\$25.00
1245	Belt Buckle	1	0 P	\$15.00	\$15.00
1275	Lead Rope	1	0 P	\$10.50	\$10.50

Current Page No.: 1 Total Page No.: 1 Zoom Factor: 100%

Print Return Auth.  Print Gift Receipt RePrint Close

## CHAPTER THREE – INVENTORY

### INVENTORY > CUSTOMER DETAILS

1. To view the customer's details, first select the special order containing the customer whose information you would like to view. Subsequent to selecting a customer, select the **"CUSTOMER DETAILS"** button.
2. Once you have selected this option a **"VIEW CUSTOMER"** window will then be displayed. This window will display the selected customer's information. This screen will display three tabs labeled as; *Customer Info*, *Attributes*, and *More*. Select from these tabs to view the customer's transaction as well as personal information.

\*Through this option you can only view the customer's information, you cannot edit this information.

**Note:** You cannot edit the customer's information through this option.

The screenshot shows a software window titled "View Customer" with three tabs: "Customer Info", "Attributes", and "More...". A red circle with the number "1" is positioned above the "Customer Info" tab. The window displays the following information:

- Identity:** Customer Type: Regular Customer, Salutation: Mrs, First Name: Jennifer, Last Name: Gale, Company: The Jumper Palace, Member ID: 09825. Checkboxes for "Mail Subscriber" and "Email Subscriber" are checked.
- Contact Info:** Phone 1: 604-239-9084, Phone 2: 604-239-8945, Cell Phone: 604-349-4938, Fax: (empty), Email: jerrigale@kssn.com.
- Address:** Address: 42389 Hope Rd, City: Hope, Country: Canada, Province / State: British Columbia, Postal / Zip Code: K3D 4K8.
- Shipping Address:** Same as Address, Address: 42389 Hope Rd, City: Hope, Country: Canada, Province / State: British Columbia, Postal / Zip Code: K3D 4K8.
- Financials:** Store Credit Balance: \$0.00, Current AR Balance: \$0.00, Points Earned: 598.
- Customer History:** Customer Since: 2008-02-26 18:48, Last Transaction: 2008-06-19 17:51.
- Other:** Tax Exemptions (GST, PST), Notes (empty text area), Picture (empty area with "Clear" and "Browse..." buttons), Sub Customer (unchecked), Active (green button), Less Detail (button).

# CHAPTER THREE – INVENTORY

## INVENTORY > INVENTORY DETAILS

1. To view the inventory details of a sku, first select the sku that you would like to view then select the **“INVENTORY DETAILS”** button located on the bottom right side of the special order window. Upon selecting this option a **“VIEW INVENTORY”** window will be displayed.
2. Within this screen you will view the *SKU, Dimensions, Description, Vendor, Quantity On Hand, Sold* and so on, within the labeled columns. In addition you can also view *SKU Activity Reports, Edit Selected Items, Edit (UPC) Lookups* as well as search for a particular item code

The screenshot shows the 'View Inventory' window with a table of inventory items. A red circle with the number '2' is positioned above the 'View' button in the top right corner of the window.

SKU	Dim.1	Store	Description	Vendor	Department	Product...	In Store Location	QOH	SOLD	COMIT	QOO	SO/Fu	QTBP	RECY	TRAN	OT
1284	BLK	TAH	Bandages	Kerrits	09-Horse...	B-374832		-2	14	0	0	1	0	12	0	0
1284	GREY	TAH	Bandages	Kerrits	09-Horse...	B-374832	Up Stock	3	1	0	0	0	0	4	0	0
1284	RED	TAH	Bandages	Kerrits	09-Horse...	B-374832		4	1	0	0	0	0	5	0	0
1284	ORNG	TAH	Bandages	Kerrits	09-Horse...	B-374832		2	0	0	0	0	0	2	0	0
1284	PURP	TAH	Bandages	Kerrits	09-Horse...	B-374832	Up Stock	9	0	0	0	0	0	9	0	0
1284	WHT	TAH	Bandages	Kerrits	09-Horse...	B-374832	Up Stock	9	1	0	0	0	0	10	0	0
1284	PINK	TAH	Bandages	Kerrits	09-Horse...	B-374832	Up Stock	6	0	0	0	0	0	6	0	0
1284	BLUE	TAH	Bandages	Kerrits	09-Horse...	B-374832		5	0	0	0	0	0	5	0	0
1284	BRN	TAH	Bandages	Kerrits	09-Horse...	B-374832		5	0	0	0	0	0	5	0	0
1284	GRN	TAH	Bandages	Kerrits	09-Horse...	B-374832	Up Stock	6	0	0	0	0	0	6	0	0
<b>Total:</b>								<b>47</b>	<b>17</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>0</b>	<b>64</b>	<b>0</b>	<b>0</b>

## CHAPTER THREE – INVENTORY

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### TRANSFERS

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The transfer section will allow you to send, receive and track stock between stores in a multi-store environment.

From the home screen, log in by selecting the Login button > select the Inventory button -> select the Transfers tab.

# CHAPTER THREE – INVENTORY

## TRANSFERS > TRANSFER OUT TAB

1. Select the store the stock is being transferred to.
2. If you know the Item Codes and Qty you wish transferred, enter it here and click the add item button.
3. If you have a large number of items in the transfer listing and need to find an item, use this search by typing in all or part of the Item and click Show All. This will open another smaller window listing all the items that match your search criteria.
4. Here you will see the list of items to be transferred.
5. This area will give you your transfer totals and also allow you to put notes on a transfer.

The screenshot shows the 'Transfer Out' interface. At the top, there are tabs for 'Transfer Out', 'Transfer In', and 'History'. Below the tabs, there are several input fields and buttons:

- 1. 'Transfer Out To Store:' dropdown menu showing '2 - Store Number 2'.
- 2. 'Track Add Items' section with 'Item Code' input, a checked 'Qty' checkbox, and an 'Add Items' button.
- 3. 'Search Items from list' section with a 'Search:' input and a 'Show All' button.
- 5. A 'Note:' text area on the right side.
- Below the note area are three input fields: 'Total Qty/No error:', 'Total Retail:', and 'Total Cost:'.

In the center is a table with the following columns: ErrorMessage, ScannedCode, Sku, D.L., D.L., Count Qty, Description, Product Num..., Sell, Cost, and Lookups. The table is currently empty.

At the bottom, there are several buttons:

- 6. 'Scanner / File' button.
- 7. 'Pre-Print' button.
- 8. 'Print Labels' button.
- 9. 'Edit' button.
- 10. 'Clear List' button.
- 11. 'Process Transfer Out' button.

### Functions available for this screen:

Scanner/File: Download a list of items from an inventory scanner.

Pre-Print: Print a transfer slip or full sized report.

Print Labels: Print labels for selected item(s) in your list.

Edit: Edit the code and/or qty of the selected item.

Clear List: Removes all items from your list.

Process Transfer Out: Transfer the items in your list to the receiving store

# CHAPTER THREE – INVENTORY

## TRANSFERS > TRANSFER IN TAB

1. Search the transfers (top list) or transfer details (bottom list).
2. Transfers listing.
3. Transfer details listing.

### Functions available for this screen:

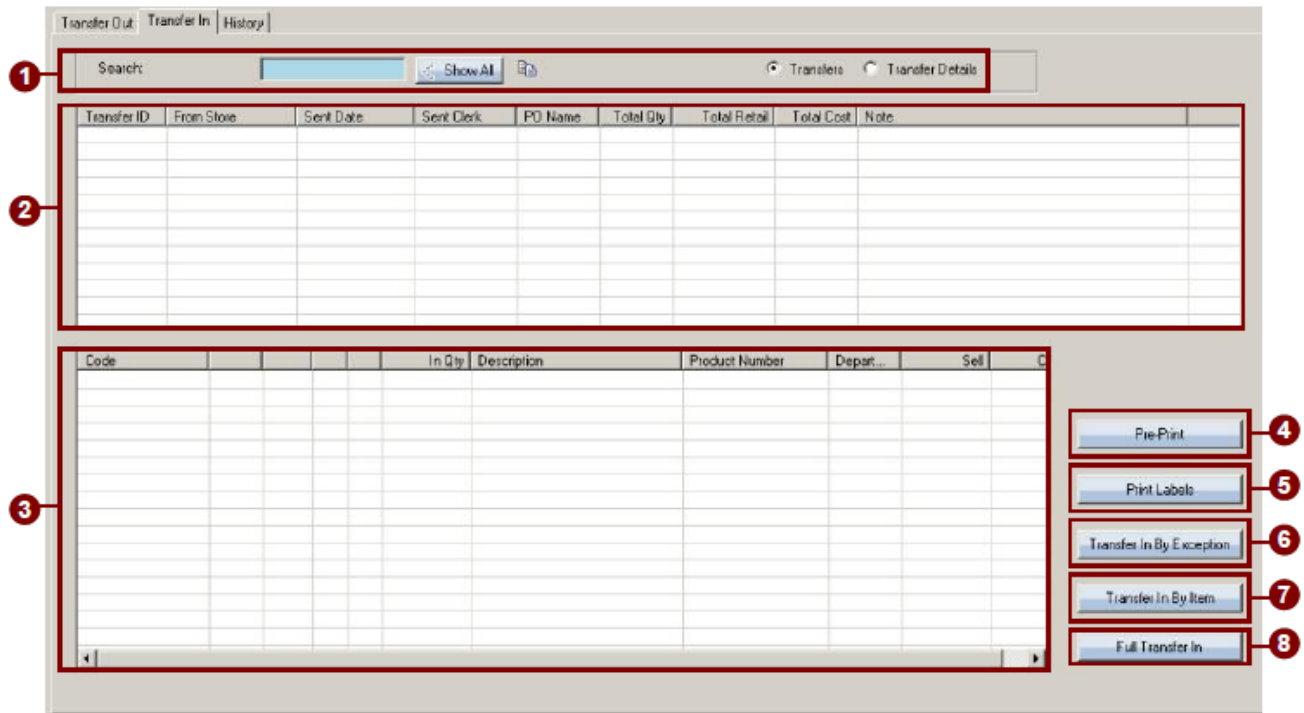
Pre-Print: Print a transfer slip or full sized report.

Print Labels: Print labels for selected item(s) in your list.

Transfer In By Exception: Opens a transfer in a window with all items/qty filled in as is.

Transfer In By Item: Opens a transfer in a window where you have to manually enter items/qty.

Full Transfer In: Transfers all items/quantities in from the selected transfer as is.



# CHAPTER THREE – INVENTORY

## TRANSFERS > HISTORY TAB

### History Tab:

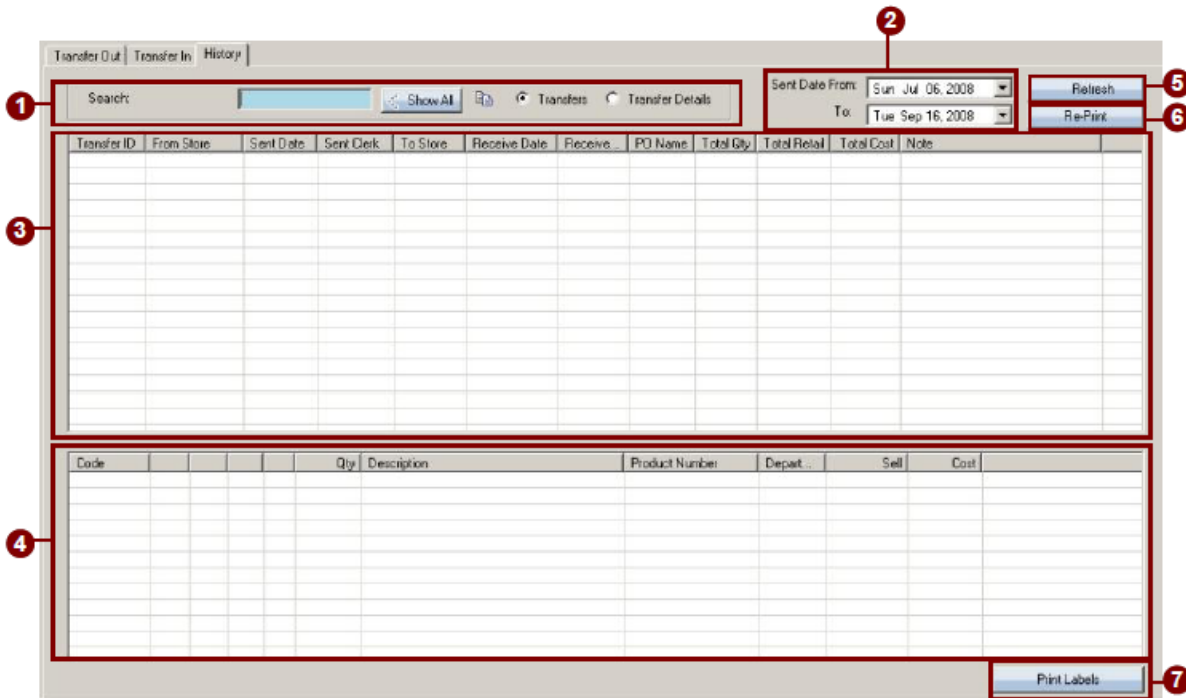
1. Search the transfers (top list) or transfer details (bottom list).
2. Set a from – to date to show only transfer history in a specific date range (remember to press the Refresh button after every date range selection to update the list based on the latest date range).
3. Transfers listing.
4. Transfer detail listing.

### Functions available for this screen:

Refresh: Refreshes the list (used primarily to refresh a list after a new date range is selected).

Re-Print: Re-print a transfer slip or full sized report.

Print Labels: Print labels for selected item(s) in your list.



## CHAPTER THREE – INVENTORY

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### EDIT ITEM PRICING

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1. To edit an item first select an item from your purchase order that you would like to edit, upon selecting an item you will then select the **"EDIT SELECTED ITEM"** button in the Order & Receive tab or the **"EDIT ITEM COST"** button on the Post tab.
2. Upon selecting these buttons an **"EDIT ITEM(S)"** window will be displayed, here you can key in the new information for the selected item.
3. At the top of this window you will see the first checkbox labeled Up-date Order Item Cost. If you wish to update the cost or the item, check this checkbox, then key in a new price into the enabled field.
4. If you would like to update the sku's list cost, check the checkbox labeled Update Sku(s)'s ListCost with Above Cost. This will alter the sku's list cost to the above cost you keyed into the enabled field.
5. Next you have the option to update the sku's sell price, to do so check the checkbox next to Update Sku Reg. Sell Price, this will then enable the field to the right, here you can key in the new reg. price for the sku.
6. To update the items discount or extra cost, check the checkbox located next to either; Update Discount, or Update Extra Cost. Upon selecting either option the field to the right will become enabled, here you can key in the new price. You will also have two columns from which you can choose from, you can either select percent or amount, from the choice you will select you will then key in the correct amount to adjust.
7. Lastly if you would like to update the sku on order with the above settings, check the checkbox next to Update Same Sku On Order In This PO With Above Settings.
8. If you have selected the Edit Selected Item button within the Order& Receive window of the current purchase order you will see another option labeled Update Order QTY. Upon checking this checkbox the field to the right will become enabled, here you can key in the new quantity you would like to order.