Chapter 3 – Post A Sale - SALE

How to Use this System

The RSSS Sales System is a point-of-sale system designed for use in retail furniture, electronics and appliance stores. The Retail Sales System is designed to be used as a stand alone system or in conjunction with the RSSS Accounts Receivable and Rent to Own System using the same customer and inventory file. The Retail Sales System operates as a single or multi-user system with dumb terminals. All stores operate as separate remote stores or online to a host. The system integrates point-of-sale and accounts receivable to control cash flow.

To get into the Sales Menu, press F10 and at the command line type in "SALES" and press the ENTER key. A screen similar to Figure 3-1 will appear.

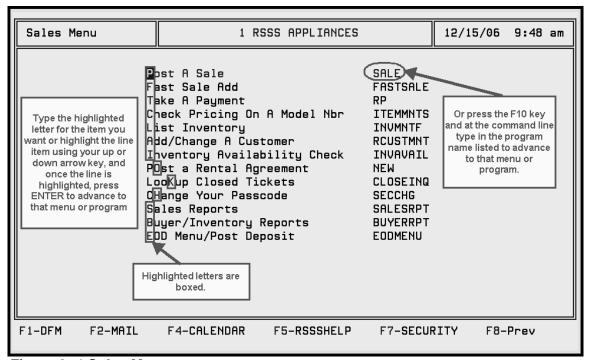


Figure 3- 1 Sales Menu

To get into any programs listed on this menu, you can type the highlighted letter of the program and that will take you into that function off this menu. You can also press F10 and at the command line, type in the program name and press ENTER if necessary to advance to that program.

Customer Functions off the Sales Menu

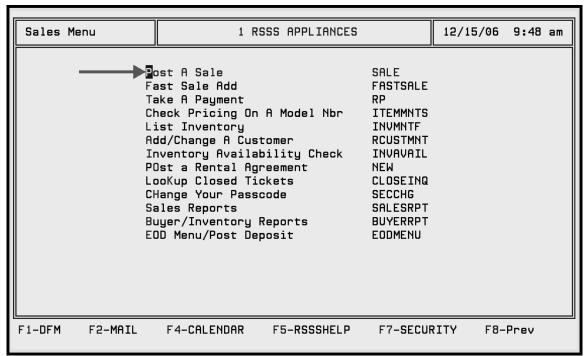


Figure 3- 2 Sales Menu

Posting a Sale

Using the SALE program you can post a sale, look at previous sales tickets and process sales refunds. See Figure 3-2. To post a sale, highlight the line "Post a Sale - SALE" and press the ENTER key or press the F10 key and at the command line type in "SALE" and press the ENTER key.

You will be prompted to enter your employee number and passcode. After you do so, the screen in Figure 3-3 will appear.

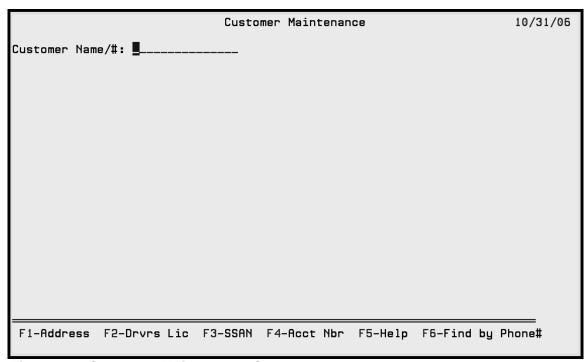


Figure 3- 3 Customer Maintenance Screen

At the Customer Name/# prompt you have the option to select a customer by name (last name first), account number, address, drivers license number, telephone number or social security number (use the corresponding **function keys**.)

			Customer	Maintenance		10/31/06			
Custome	Customer Name/#: BAKER SHERRY								
Loc * 1	Acct Nbr 5003338 10010327 10007972 10003587 10005108 10004123 5000923 5002111 10007388 4001738 10006641 2002482 10010515 2002386 2001640	BAKER BAKER BAKER BAKER BAKER BAKER/CARTE BAKEY BAKOS BALAREZO BALDWIN BALDWIN BALDWIN BALDWIN BALDWIN	First Name SHERRY SIMONE SUSAN TANYA TRENT RLERONE/EVE WILLIAM KENNETH JOSEPH ANTHONY CHARLES/ME REGINA TARA TERRY ARTHUR	4109 32ND AVE-BA 1455 90TH AVE LO 3569 LINDA DR 1243 ASTORWOOD P	ANYTOWN ANYTOWN ANYTOWN ANYTOWN ANYTOWN	SSAN 0001 0001 0001 0001 0001 0001 0001 0001 0001 0001 0001			
F1-Nex	t Page	F2-Prev	Page FC	3-AR/RTO Hist	F4-Chg	<u></u> F6-Add			

Figure 3- 4 Customer Maintenance Screen w/data

To select the customer, make sure your cursor is on the highlighted customer you want to select and press the F9 key to move to the sale posting process.

Adding a sales customer

If the customer is not already in your system, while you have the customer listing on your screen, press the F6-Add key. The add screen will appear, see Figure 3-5.

```
Customer Add
                                                                       10/31/06
  Customer/Or:
                                                    Acct#:
  Company Name:
  Contact Name:
       Address:
Address Line 2:
Zip/City/State: 11111-0000 CORPUS CHRISTI TX
                                                Map Code:
Home Phone Nbr:
                                    Work Phone Nbr:
Cell Phone Nbr:
                                    Pager Phone Nbr:
Fax Phone Nbr:
                                         Birth Date:
         SSAN:
                               Drivers License Nbr:
                      Tax Codes
     Taxable?: Y
                                   Bill To Number:
   Tax Number:
                              Retail Discount Level:
   Charge Cust: N
 Credit Limit:
                     0
                            Default Retail Pmt Form:
  Status Flag:
                     Default: Salesperson/Acct Mgr:
 Customer Type:
                                           RTO Recv:
Email Address:
 Bank/CC Info:
                                             00/00
Default PO Nbr:
                                  Best Time to Call:
       Enter the customer's last name or leave blank for Company Name
F1-References
                                   F3-Landlord
                   F2-Employer
                                                   F4-2nd Cust
                                                                   F7-Car Info
```

Figure 3- 5 Customer Add Screen

The following fields require you to enter data: address, zip code, home phone number, social security, driver's license (If your company does not require this information enter a 1 in the field). Once you have entered the customer's information, press the F9 key and you will get the "Any More Changes" prompt. When you accept the default of N at the "Any More Changes" prompt, the cursor will go to the comments box. Here you may enter up to 50 lines of comments on this customer, such as directions to the house, etc. This is information you will want to keep permanently on this customer's account. When you are done, press the F9 key and you will be taken to the sales screen to begin entering the sale. Please see <u>Chapter 2 - Changing Customer Data - RCUSTMNT</u> for more information on adding, changing, deleting customers. Whether the customer existed or was added, your screen should now resemble Figure 3-6.

```
Store:
                                   Sales Entry D
                                                                        10/31/06
 Name: BAKER
                       , SHERRY
                                          Acct#:
                                                   5003338
                                                             H Ph: (555)555-5555
  Add: 536 WISTAR CT, NE
                                                             W Ph: (555)555-5555
 City: ANYTOWN
                      TX 55555
                                  License: 1
                                                                SSAN 000-00-0001
Comment:
Right Cust: Y
                             Enter an "N" or a "Y"
 F1-Cust Chgs
                F3-Prev Tickets F5-Help
                                            F6-Comment
                                                         F8-Backout
                                                                       F9-Done
```

Figure 3- 6 Sales Entry Screen

Note the screen prompts at the bottom of the screen.

- **F1** Allows employee (with proper security) to change customer information such as address and phone number
- **F3** Allows the employee to review the customer's previous sales tickets and process refunds
- **F5** Help key
- **F6** Allows user to post a comment

Your cursor will be at the prompt "Right Customer". If this is not the right customer, enter an "N". You will be returned to a screen similar to Figure 3-3. When the "Right Customer" prompt is answered with a "Y", the screen will change slightly as shown in Figure 3-7.

```
Store:
                                    Sales Entry D
                                                                         10/31/06
                        SHERRY
 Name: BAKER
                                           Acct#:
                                                    5003338
                                                              H Ph: (555)555-5555
  Add: 536 WISTAR CT, NE
                                                              W Ph: (555)555-5555
                       TX 55555
 City: ANYTOWN
                                   License: 1
                                                                 SSAN 000-00-0001
                                                     C1A:
                                                               0C2B:
                                                                          0.00
                                         0.00 Total+Tax:
Total Amt:
                 0.00 Taxable Amt:
                                                              0.00 Items Sold: 0
Desc1:
Model Nbr
                   Serial #
                                   Price
                                             Qty
                                                       Total
                                                              Spiff
                                                                       Del Date
AC
                                   0.000
                                            0.00
                                                        0.00
                                                               0.00
Model Nbr(wildcards allowed), a few characters of the desc, or F7 for packages
 F1-Next F2-Prev F3-Change F4-Delete F6-Insert F7-Note F8-Backout F9-Done
```

Figure 3- 7 Sales Entry Screen for the right customer

Your cursor will be under the "Model Number" prompt. You can scan in a UPC code, enter the entire model number or you can search by partial model number using the (*) key to replace the first few characters, or search by product description. You can also leave the model number field blank, press the ENTER key to go to the "Serial #" field and enter the serial number. If the serial/model number is not known, with your cursor at the "Model Number" prompt, you have three options:

- 1. If you are doing a special order, layaway or stock sale. you can enter the full model number and press ENTER. Go to <u>page 6</u> of this chapter for the details on how to do this.
- 2. If you are selling miscellaneous or accessory inventory and want to search for the model number, go to page 13 of this chapter.
- 3. If you are selling serialized inventory out of your stock and need to search for a serial number, go to page 17 of this chapter.
- 4. If you are selling serialized inventory out of your stock and you know the serial number, see below.

Once you press the ENTER key, the model number and serial number will be placed under the appropriate prompts on the Sale Add screen. Your cursor will be at the prompt "Price", see Figure 3-8. If this is the correct price, press the ENTER key; if not, enter the correct one and press the ENTER key (see page 41 of this chapter for information on using the MAP/MOP feature to change the price). Any change in price will create a profit exception on a gross profit exception report. Your cursor will now move to beneath the prompt "Qty". The quantity should be "1" when selling a serialized item. Press the ENTER key. Your cursor will now move to beneath the prompt "Spiff". If there is a spiff assigned to this item in Item Maintenance (ITEMMNTS), it will be displayed. If it does not appear here, and one is to be paid you may enter it here with proper security.

```
Store:
                                   Sales Entry D
                                                                       10/30/06
Name: BAKER
                       , SHERRY
                                          Acct#:
                                                   5003338
                                                             H Ph: (555)555-5555
 Add: 536 WISTAR CT, NE
                                                             W Ph: (555)555-5555
City: ANYTOWN
                      TX 55555
                                  License: 1
                                                                SSAN 000-00-0001
                                                              0C2B:
                                                    C1A:
                                                                        0.00
                 0.00 Taxable Amt:
                                        0.00 Total+Tax:
                                                             0.00 Items Sold: 0
Total Amt:
Desc1: AIR CONDITIONER
                             Desc2: A/C 14K BTU
                                                                  RBV:
                                                                         477.32
Model Nbr
                   Serial #
                                   Price
                                            Qty
                                                      Total
                                                             Spiff
                                                                     Del Date
ACAMA14010C1D
                  123456798 1,619.990
                                           1.00
                                                   1,619.99
                                                             0.00
                                                                     10/30/06
       Enter item price or a lower price for GrossProfit window display
F1-Next F2-Prev F3-Change F4-Delete F6-Insert F7-Note F8-Backout F9-Done
```

Figure 3- 8 Sales Entry Screen with items being sold

Press the ENTER key. Your cursor will now move to beneath the prompt "Del Date". This will default to today's date but can be changed if necessary. Your cursor will now move beneath the model number. You can sell more inventory items following these same steps. When you have entered all the inventory items you wish to sell on this ticket, press the F9 key. You will be prompted "Any More Changes: N". When you press the ENTER key to accept this default of "N", your screen will change to resemble Figure 3-9.

Store: 1		Sales Entry D 10/30/06 C1A: 66.85 C2B: 0.00
Contract: Date: 10/30/06 Trade: Pmt 1: 1753.64 Desc1: Model Nbr ACAMA14010C1D	Tax Code: Store: Discount: Pmt 2: Serial # 123456798	1 Salesman: 998 Tot Price: 1619.99
	F5-Help	Enter the amount due F8-Back Out CMD-Exit Program

Figure 3- 9 Sales Entry Screen with items being sold

At this point the system will drop you down to the Pmt 1 prompt. If you need to change any of the previous fields, use your arrow up key to edit:

CONTRACT

Enter the contract number you want to assign to this sale. This field is a free form field and generally not used. However, if you are selling your paper to a finance company and their contracts are numbered, you can enter that number here.

TAX CODE

Leave blank and the system will automatically calculate taxes for you based on settings in Sales Control (SALESCTRL) for your store or ZIPCODES if you are required to pay sales tax based on customers jurisdiction. This field is only changed if; (1) customer lives in a different tax jurisdiction not noted in ZIPCODES, (2) this is a non taxable customer Enter 999 to list available tax codes.

DATE Defaults to today's date.

STORE This field will default to your current location.

SALESMAN

The system will automatically pull your salesman number from the security entry screen. If you know the salesman number of the salesman who made this sale, enter it here. If you do not know the number, enter zero or 99999 and you will get a window of all the salesmen. Just arrow down to the one you want and press the ENTER key. Your cursor will then go to the next salesman field. Sales can be split up to three ways. They will be split evenly. If there is no other salesman, press the ENTER key twice. If there is another one, enter this number in the field after the first salesman or type in 99999 to get a listing. Choose the correct one off the listing and press the ENTER

key. Repeat the procedure again if there is a third salesman. If there are no other salesmen, press the ENTER key to move to the next field.

TOTAL PRICE

This is the total price of all items without tax. Generally, you will just enter through this field. However, if the customer has made you an offer of a lower price that you are going to accept, you can enter the amount they have offered here. Once you enter that amount, the retail price and tax on each item will adjust automatically based on settings in Sales Control (SALECTRL) under the heading "RDPrice" Redistribute prices in SALE based on % of: (C)ost or Original (P)rice.. As a result, this also adjusts the gross profit proportionally.

TRADE

If the customer has a trade-in, enter the amount here and press enter. The trade-in amount will be taken off of the total price and tax will be adjusted automatically based on your settings in Sales Control (SALECTRL) under the heading "Tax Trade-in Indr", you will be prompted to enter the information for the trade-in.

DISCOUNT

If you are giving the customer a discount off of the total price, enter the amount of the discount here and press enter. The discount amount will be taken off of the base price and tax will be adjusted accordingly.

TAX

This is the sales tax amount. It is automatically calculated based on how you have the sales tax set in Sales Control (SALECTRL) or tax code if entered in the field TAX CODE.

TOTAL AMOUNT This field will be filled in automatically by the system. This is the total price of all items with tax. Generally, you will just enter through this field. However, if the customer has made you an offer of a lower price you are going to accept, you can enter the amount they have offered. Once you enter that amount, the retail price and tax will be adjusted automatically based on settings in Sales Control (SALECTRL) under the heading "RDPrice" Redistribute prices in SALE based on % of: (C)ost or Original (P)rice. As a result, this also adjusts the gross profit proportionally.

At this point, your cursor will be on the Pmt 1 field. This is where you are going to enter the payment collected and in what form you are taking it (cash, check, credit card charge, etc). There is also a field on the screen called "Amt to Allocate". This is the amount of money you still have left to allocate through these payment fields. It will decrease as you post the various payments. When the amount to allocate is zero, you can move past the payment field. You must allocate the exact amount of the sale or you cannot move on. For detailed information on the use of the accounts receivable payment form, go to page 39 of this chapter.

PMT 1

Enter the amount they are paying and press ENTER. You will now be prompted to enter a payment form. If you do not know the payment form, press ENTER and you will get a window of all the available payment forms, see Figure 3-10. Using your arrow keys, take your cursor down to the one you want and press ENTER to choose it.

If you choose cash, check or money order and you have set up the system to calculate change in Sales Control (SALECTRL), you will be prompted to enter an amount tendered. Once you enter the amount tendered, the amount of change you need to give the customer will display on the screen and also print on the receipt. If you have allocated the entire amount due, your cursor will move to Ticket number, otherwise it will go to the field PMT 2.

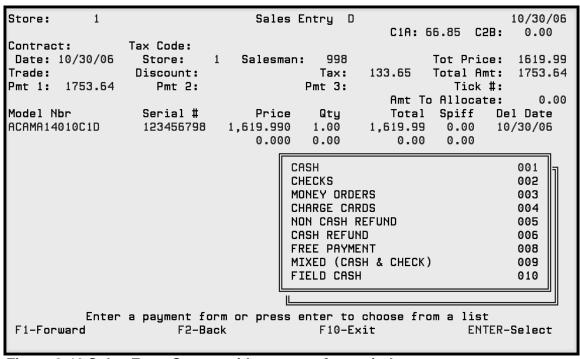


Figure 3-10 Sales Entry Screen with payment form window

- PMT 2 If the total amount was not paid with the first payment, follow the same procedure as you did for Pmt 1 to enter the second payment.
- PMT 3 If the total amount was not allocated in the first and second payment, follow the same procedure as you did for Pmt 1 and Pmt 2 to enter the third and final payment.

You must allocate the total price or the system will not let you continue.

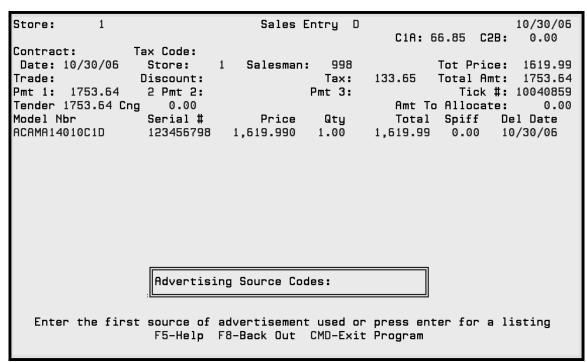


Figure 3-11 Sales Entry Screen prompting for Advertising Source Codes

TICKET NBR Enter through this field to let the computer assign the ticket number.

CUST CARRYOUT You may get this prompt based on settings in Sales Control (SALECTRL) "Ask: **CO**/Adv:". This is a Yes or No question. This is a field that is tied to the gross profit commission table. If this is answered with a Y, the salesman will receive a higher commission than if answered with an N when you are using the table to pay commissions.

ADVERTISING SOURCE CODE Depending on your setting in Sales Control (SALECTRL) "Ask: CO/**Adv**:", you may be asked for an advertising source code. Press ENTER at this field and a list of codes will be displayed here. You may enter up to four codes, see Figure 3-11. These code(s) are very important for tracking how effective various forms of advertising are.

```
Store:
                                   Sales Entry D
                                                                       10/30/06
                                                      C1A: 66.85 C2B:
                                                                         0.00
Contract:
                 Tax Code:
Date: 10/30/06
                                             998
                                                            Tot Price: 1619.99
                  Store:
                             1
                                 Salesman:
                                            Tax:
Trade:
                  Discount:
                                                   133.65
                                                            Total Amt: 1753.64
                                                               Tick #: 10040859
Pmt 1: 1753.64
                   2 Pmt 2:
                                          Pmt 3:
Tender 1753.64 Cng
                      0.00
                                                      Amt To Allocate:
Model Nbr
                   Serial #
                                   Price
                                            Qty
                                                      Total Spiff
                                                                     Del Date
ACAMA14010C1D
                   123456798
                               1,619.990
                                           1.00
                                                   1,619.99 0.00
                                                                     10/30/06
Any More Changes: N
               F1 To Enter Customer PO or Manual Invoice Number
                    F5-Help F8-Back Out CMD-Exit Program
```

Figure 3-12 Sales Entry Screen prompting with F1

You will now see the prompt "F1 To Enter Customer PO or Manual Invoice Number", see Figure 3-12.

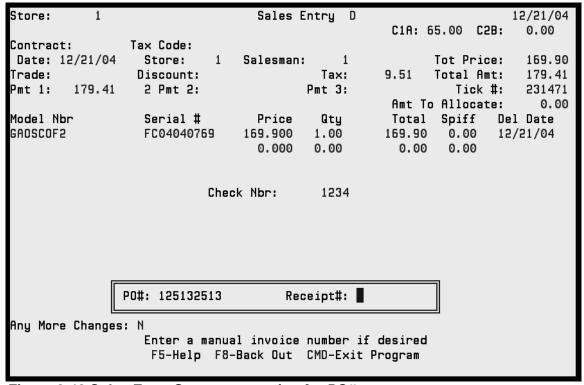


Figure 3-13 Sales Entry Screen prompting for PO#

If you press the F1 key, the screen will change slightly and you may enter the PO number or Manual invoice number here as seen in Figure 3-13. Your control records can be changed to reflect the PO or Manual invoice number, if one exists, instead of the ticket number in the Take Payment screen.

You will now be prompted for "Any More Changes". When this is answered with an "N", you will be prompted to enter delivery notes to print on the delivery receipt. Once you have entered your delivery notes, you are asked if you want to print a delivery receipt. If you answer "Y", one will print with your sales ticket. You can print as many as you need. Enter an N to continue.

Next it will prompt you for reprinting the receipt. Print as many as you need and enter an N to continue on.

If you used an accounts receivable payment form that has a contract to print out, the last question you will be prompted to answer is "Print Contract." If you answer yes, a contract will print on the printer you have designated.

Other options when posting a sale:

Sale of Miscellaneous/Accessory Item Inventory

If you know the model number of the item you are selling, type it in the model number field and press ENTER. If you are unsure of the model number and you need to search for it, enter the first couple of characters of either the model number or description and press ENTER. In this example, I entered AA in the model number field and pressed ENTER. See Figure 3-14.

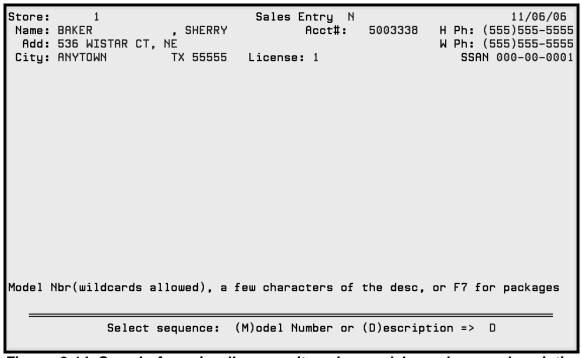


Figure 3-14 Search for miscellaneous item by model number or description prompt

Your cursor will move to the bottom of the screen at the Select Sequence field prompt. Press ENTER to search by description or enter an M and search by model number. A window listing inventory will populate beginning with the first few characters you type in to search on. See Figure 3-15.

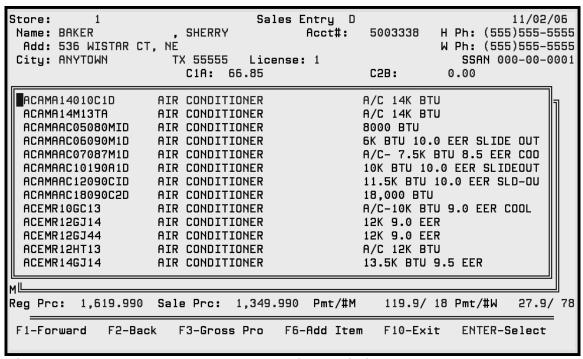


Figure 3-15 Inventory by model number window listing

Using your up or down arrow keys, highlight the item you wish to select for the sale and press ENTER. If the item is not listed on this screen use your F1-Forward or F2-Back keys to move forward and back in the listing to find the item you are looking for. The screen will change and appear similar to Figure 3-16.

```
Store:
                                    Sales Entry N
                                                                         11/06/06
 Name: BAKER
                         SHERRY
                                           Acct#:
                                                    5003338
                                                               H Ph: (555)555-5555
  Add: 536 WISTAR CT, NE
                                                               W Ph: (555)555-5555
                       TX 55555
 City: ANYTOWN
                                                                  SSAN 000-00-0001
                                   License: 1
                                                     C1A:
                                                                0C2B:
                                                                          0.00
                                       550.00 Total+Tax:
                                                             583.00 Items Sold: 1
Total Amt:
               550.00 Taxable Amt:
Desc1: AATEST1
                              Desc2:
Model Nbr
                   Serial #
                                    Price
                                             Qty
                                                       Total
                                                              Spiff
                                                                       Del Date
ACBRY12345
                   STOCK
                                  550.000
                                            1.00
                                                      550.00
                                                                0.00
                                                                       11/06/06
AATEST1
                                   20.000
                                            1.00
                                                        0.00
                                                                       11/06/06
                   MISC
                                                                0.00
 Enter a serial nbr or "MISC" or "SPEC ORDER" or "LAYAWAY
       or enter "AA" to go to Inventory Maint Screen to select inventory
 F1-Next F2-Prev F3-Change F4-Delete F6-Insert F7-Note F8-Backout F9-Done
```

Figure 3-16 Sales Entry Screen with model number populated from window listing

Your cursor will be under the serial number field and MISC will be entered there. If you are going to sell this item and give it to the customer at this point, just press ENTER and continue on through the sale. If this is going to be a stock, special order or layaway sale, type in one of these and continue on. As in the sale of a serialized item, the price defaulted will be the regular price on the model number. amount shown is the price you are going to charge, press ENTER. If you want to change the price (and you have the security authorization to do so), do so, then press ENTER. Your cursor will now be below the prompt for quantity. This will automatically default to 1; if you are only selling one, press ENTER. If you are selling more than one, enter the correct number and press ENTER. Your cursor will now be below the prompt Spiff. The spiff will automatically appear if the spiff is set in Item Maintenance (ITEMMNTS). If a spiff does not appear, but a spiff is to be paid or you want to change the spiff amount that appears, enter it and press ENTER. Your cursor will now be under delivery date. This defaults to today's date, but you may change it if necessary and press ENTER. You screen will appear similar to Figure 3-17.

Add:	536 WISTAR	, SHERF CT, NE TX 5555	łY	Entry N Acct#: : 1		W Ph: (55	11/06/06 55)555-555 55)555-555 000-00-0001
Total A	mt: 570	0.00 Taxable	Amt: 570 lesc2:	.00 Tota			
	hn	Serial #	Price	0+	Total	Spiff [Del Date
ACBRY12		STOCK		-	550.00		1/06/06
AATEST1		MISC		1.00			1/06/06
ппісэіі		HISC		0.00		0.00	1700700
Model N	br(wildcard	ds allowed),	a few chara	cters of	the desc,	or F7 for	packages
F1-Nex	t F2-Prev F	3-Change F4-	Delete F6-I	nsert F7-	-Note F8-B	Backout F9-D)one

Figure 3-17 Sales Entry Screen with miscellaneous item entered

Your cursor will now be on the next item line. If this customer is buying anything else, follow the above procedure again. When you have entered all the merchandise this person is buying, press the F9 key twice till you get the prompt "Any More Changes". When this is answered with an N, the screen will change to the screen where you post all the money you are collecting, see Figure 3-18. Please go to page 9 of this chapter for details on the money screen.

Store: 1		Sales Entry N 11/06/06 C1A: 35.26 C2B: 0.00
Contract: Date: 11/06/06 Trade: Pmt 1: 604.20 Desc1: Model Nbr ACBRY12345 AATEST1	Tax Code: Store: Discount: Pmt 2: Serial # STOCK MISC	C1A: 35.26 C2B: 0.00 1 Salesman: 998
	F5-Help	Enter the amount due F8-Back Out CMD-Exit Program

Figure 3-18 2nd Sales Entry Screen (Money Screen)

Search for Serialized Inventory in SALE

For the sale of serialized inventory, you can enter the serial number in the serial number field and this will automatically pull up the item. If you do not know the serial number or need to check to make sure it's the right one, type in "AA" in the serial number field and press ENTER to get the inventory inquire screen, see Figure 3-19.

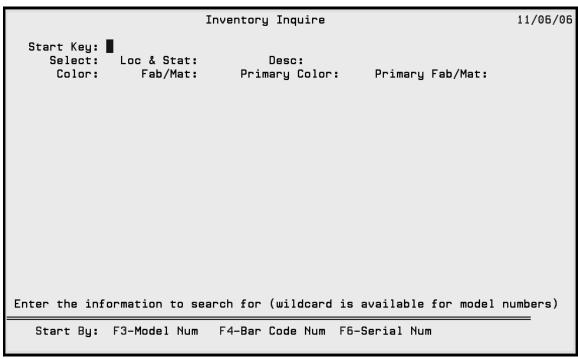


Figure 3-19 Inventory Inquire Screen

The cursor will be on **Start Key**. You can enter the model number, serial number, or bar code number on this line. **Press the corresponding function key** (as listed on the bottom of the screen).

You can also choose to list specific locations, statuses, descriptions, colors, fabrics, primary colors and primary fabrics. A more detailed explanation of how this program works can be found in the <u>Chapter 8 Inquiring on Inventory – INVMNT, INVMNTF & INVAVAIL</u>.

The screen will display a list of units in stock. In Figure 3-20, we listed by model number.

		Inventory In	quire		10/30/06
ACAMA14010C1 ACGLD1804R ACGLDM1840R ACGLDR1403 ACGLDR1404	: Loc & Stat : Fab/Mat Serial Nbr Des 123456798 AIR 11KA00363 AIR 111KA00436 AIR 103KA00223 AIR 205KA00251 AIR 111KA00028 AIR QR1707396 AIR	Description CONDITIONER CONDITIONER CONDITIONER CONDITIONER CONDITIONER CONDITIONER CONDITIONER CONDITIONER CONDITIONER	:	Primary Fab/Mat: Fab/Mat	10/30/06 Loc S 1 R 2 R 601 R 4 R 3 R 601 R
ACWPLACQ082X ACWPLACQ082X ACWPLACQ102X ACWPLACQ102X	QR0403411 AIF QR2412323 AIF QR2412349 AIF QR0919916 AIF QR0919922 AIF	R CONDITIONER R CONDITIONER R CONDITIONER R CONDITIONER R CONDITIONER R CONDITIONER			1 R 2 R 2 R 1 R

Figure 3-20 Inventory Inquire Screen with model number data

This screen will display the model number, serial number, location, status, description, color and fabric/material. It will only list items available for sale. Using the arrow keys, highlight the item you wish to select for this sale and press the ENTER key. If you do not see what you need or are looking for, press the F8 key and you will be taken back to a screen similar to Figure 3-19.

Posting a special order, layaway or stock sale

If you know the model number of the item you are selling, type it in the model number field and press ENTER. If you are unsure of the model number and you need to search for it, enter the first couple of characters of either the model number or description and press ENTER, see Figure 3-21.

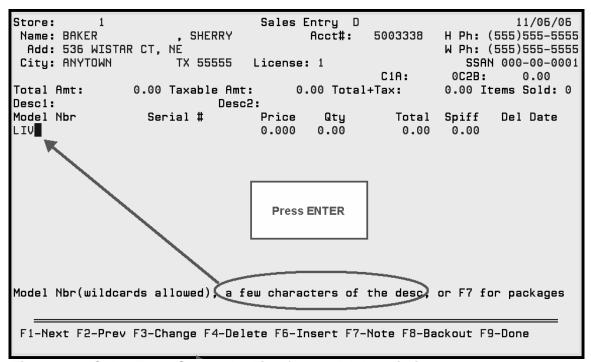


Figure 3-21 Sales Entry Screen looking for model description

The screen will look similar to Figure 3-22.

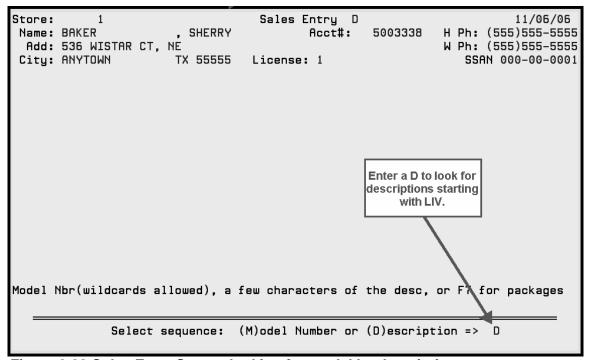


Figure 3-22 Sales Entry Screen looking for model by description

Your cursor will be at the bottom of the screen. Enter the appropriate letter, according to the prompt to get a window showing you an alphabetical listing beginning with the characters you typed in, see Figure 3-23.

Store: 1 Name: BAKER Add: 536 WISTAR CT City: ANYTOWN	, NE			W Ph: (55	11/06/06 55)555-555 55)555-555 00-00-0001
	C1A: 68		C2B:	0.00	
FLASH3205 FLASH4030588/35 FLASH4100055/56/77 FLASH63301 FLASH64700 FLASH81000 FLASH81050 FLASH82101	LIVING ROOM LIVING ROOM LIVING ROOM LIVING ROOM LIVING ROOM LIVING ROOM LIVING ROOM LIVING ROOM		LITE WOOD I S/L PORT GI REC S/L BAI 3PC BLK SEI S/L PRESTOI S/L REGENT S/L BUBALOI S/L BABALOI S/L SOUND I SOUND BRIDI S/L CARAWOI S/L SUN VAI	RANITE LTIC BLUE CTIONAL N EBONY TAUPE O SAND O BRIDGE GE CHAIR OD BLACKBE	CRRY
ML		255 252 5 . /#4	74.0/	40.0	40.07.70
Reg Prc: 1,159.990 ——————————————————————————————————		3-Gross Pro			18.9/ 78 ====================================

Figure 3-23 Sales Entry Screen with model number window

Using your arrow keys, highlight the correct model number and press F9. This will put the model number on the screen for you. Press ENTER and the screen will change to resemble Figure 3-24. If the model number for a special order is not listed here, you may use SPEC ORDER as the model number.

```
Store:
                                  Sales Entry D
                                                                     11/06/06
                       , SHERRY
                                                  5003338
                                                            H Ph: (555)555-5555
Name: BAKER
                                         Acct#:
 Add: 536 WISTAR CT, NE
                                                            W Ph: (555)555-5555
 City: ANYTOWN
                      TX 55555
                                 License: 1
                                                              SSAN 000-00-0001
                                                   C1A:
                                                            0C2B:
                                                                      0.00
                0.00 Taxable Amt:
                                       0.00 Total+Tax:
                                                           0.00 Items Sold: 0
Total Amt:
Desc1: LIVING ROOM
                            Desc2: LITE WOOD PEDISTAL TABLE
                                                                   Del Date
Model Nbr
                  Serial #
                                 Price
                                         Qty Total Spiff
                              1,159.990
FDSEM100522
                                         1.00
                                                    0.00
                                                           0.00
                                                                   11/06/06
 Enter a serial nbr or "MISC" or "SPEC ORDER" or "LAYAWAY
       or enter "AA" to go to Inventory Maint Screen to select inventory
 F1-Next F2-Prev F3-Change F4-Delete F6-Insert F7-Note F8-Backout F9-Done
```

Figure 3-24 Sales Entry Screen serial number entry

Enter "stock", "special order", or "layaway" in the serial number field. This will allow the sale to be processed without a serial number. This will **not** take a unit out of inventory when the sale is processed. Items will need to be transferred upon delivery.

If you type in SPEC ORDER, this sets up a special order for the model number. If you type in LAYAWAY, this puts one of these items on layaway for this customer. For the purposes of this example, we will use STOCK. You would post the sale the same way if it was a special order or layaway.

If you type in STOCK, this means you are selling one of these items out of stock to this customer. In this case, the item is already in stock, you just don't want to assign a specific serial number to the item until you deliver it.

After you enter the word STOCK and press ENTER, your cursor will be on price. The regular price on the model number will show up here. If there is no price, enter it here. (If you need to change the price using the MAP/MOP feature, go to <u>page 41</u> of this chapter). Press ENTER. The cursor will then be on the spiff amount. If there is a spiff on this model number it will default here or if there is a spiff on this specific item, you can enter it here. **The spiff can only be changed by employees who have the proper security to do so.**

After you go through the spiff field, your cursor will be on the delivery date. Here, you will enter the date you anticipate delivery will take place. This date is especially important for special orders and layaways.

Once you have entered the delivery date, your cursor will go to the next line for you to enter the next item. If you are doing another special order, layaway or stock sale, for this customer, follow the instructions above for each item. See Figure 3-25.

```
Store:
                                   Sales Entry D
                                                                        11/06/06
 Name: BAKER
                       , SHERRY
                                          Acct#:
                                                   5003338
                                                              H Ph: (555)555-5555
  Add: 536 WISTAR CT, NE
                                                              W Ph: (555)555-5555
 City: ANYTOWN
                       TX 55555
                                                                SSAN 000-00-0001
                                  License: 1
                                                    C1A:
                                                               0C2B:
                                                                         0.00
Total Amt:
             1,159.99 Taxable Amt: 1,159.99 Total+Tax: 1,255.69 Items Sold: 1
Desc1:
                             Desc2:
Model Nbr
                   Serial #
                                   Price
                                            Qty
                                                      Total
                                                             Spiff
                                                                      Del Date
FDSEM100522
                   STOCK
                               1,159,990
                                           1.00
                                                   1,159.99
                                                              0.00
                                                                      11/06/06
                                   0.000
                                           0.00
                                                       0.00
                                                              0.00
Model Nbr(wildcards allowed), a few characters of the desc, or F7 for packages
 F1-Next F2-Prev F3-Change F4-Delete F6-Insert F7-Note F8-Backout F9-Done
```

Figure 3-25 Sales Entry Screen for special ordering when model number does not exist

Special Order when model number does not exist

Type in SPEC ORDER in the model number field, see Figure 3-26.

Note: SPEC ORDER must be set up in Item Maintenance (ITEMMNTS) as a miscellaneous model number.

```
Store:
                                   Sales Entru D
                                                                       11/06/06
                                                             H Ph: (555)555-5555
 Name: BAKER
                       . SHERRY
                                          Acct#:
                                                   5003338
  Add: 536 WISTAR CT, NE
                                                             W Ph: (555)555-5555
 City: ANYTOWN
                       TX 55555
                                  License: 1
                                                                SSAN 000-00-0001
                                                    C1A:
                                                              0C2B:
                                                                        0.00
Total Amt:
                0.00 Taxable Amt:
                                        0.00 Total+Tax:
                                                             0.00 Items Sold: 0
Desc1: SPEC ORDER ITEM
                            Desc2:
Model Nbr
                  Serial #
                                   Price
                                            Qtu
                                                      Total Spiff
                                                                     Del Date
SPEC ORDER
                  SPEC ORDER
                                   0.000
                                           1.00
                                                       0.00
                                                              0.00
                                                                     11/06/06
       Enter item price or a lower price for GrossProfit window display
 F1-Next F2-Prev F3-Change F4-Delete F6-Insert F7-Note F8-Backout F9-Done
```

Figure 3-26 Sales Entry Screen typing with SPEC ORDER
Page 22 of 54

Enter "SPEC ORDER" in the serial number field. This will allow the sale to be processed without a serial number or existing model number. This will **not** take a unit out of inventory when the sale is processed. Items will need to be transferred upon delivery. Press ENTER if your cursor had not advanced to price. Enter price and press the END key. Press the F7 key and you will be prompted to add notes to the spec order line item. These notes will aid Purchasing in ordering the desired items, and creating a model number. You may be as detailed as necessary, see Figure 3-27. Press F9 to close the note and enter the price of the item.

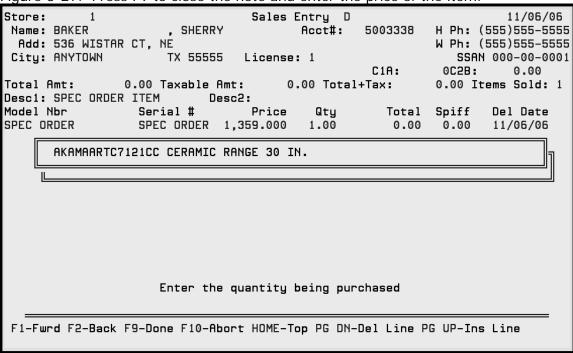


Figure 3-27 Sales Entry Screen with SPEC ORDER, adding notes

Press ENTER. The cursor may stop on quantity. Enter quantity and press ENTER. (The quantity can only be 1 on a serialized item)

After you enter through the spiff field, your cursor will be on the delivery date. Here, you will enter the date you anticipate delivery will take place.

Your cursor will now be under model number and you can sell more inventories following the same steps. When you have entered all inventories you wish to sell on this ticket, press F9. You will be prompted for "Any More Changes: N". Continue on with the sale.

After the buyer has created the model number and the PO, they will press F10 and type in "MISCMNT". At the start key type in the customer number, press ENTER and type in the ticket number. Press ENTER and you will get a listing as shown in the following screen, see Figure 3-28.

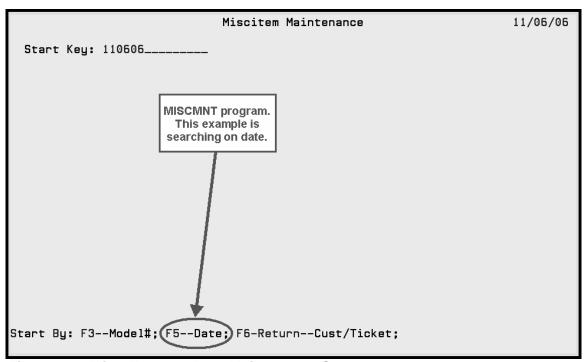


Figure 3-29 Miscellaneous Item Maintenance Screen

Using your arrow keys, move your cursor to the correct special order from the list and press F3, see Figure 3-29.

	Miscitem	Maintenance	8	11/0	6/06
Start Key: 110606					
Date-Time 11/06/06 15:50:22000 55/29/55 15:36:17000 55/44/55 16:51:34000 55/44/55 16:51:34001 55/52/55 12:16:06000 55/55/55 14:07:30000 55/55/55 15:24:11000	55/29/55 10003334 55/44/55 5002309 55/44/55 5002309 55/52/55 100002473 55/55/55 10000889	310040860 410010369 510006159	Model SPEC ORDER FDBER9526 JMSORG167 JMSORG186 EAHTP5000ER FACRY577 SSHHW5/0	Serial St SPEC ORDER 36305 35747 35746 836/350567 30389 35518	1 S 1 E 3 E 3 E 3 E 1 E 4 E
	Customer: SHER	7	BAKER		
F3-Special Order, F4	-Refund, F5-Del, F0	5-Add, F8-Ba	ackout, Returi	n-Select	

Figure 3-29 Miscitem Maintenance Screen selecting special order

The Special Order Update screen will appear. Press ENTER. Press F6 to view any notes that have been attached to this ticket, see Figure 3-30 and Figure 3-31.

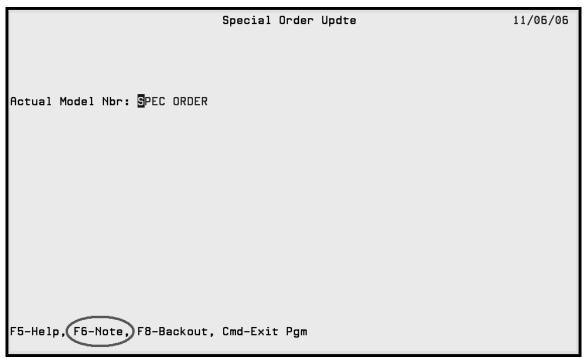


Figure 3-30 Special Order Update Screen select Notes

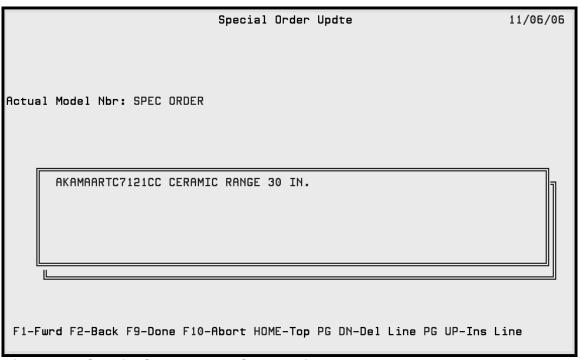


Figure 3-31 Special Order Update Screen with Notes

Press the F8 or F9 key to get out of the note section.

With your cursor at the model number field, you may type in the exact model number and press the F9 key. If you wish to search the existing model file, type in a

few characters of the model number or description and press the F9 key. You will be prompted (M)odel Number or (D)escription, see Figure 3-32.

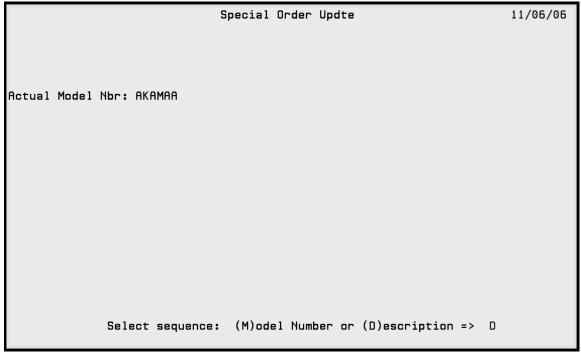


Figure 3-32 Special Order Update Screen with Actual Model Number

By selecting or adding a model number then pressing the F9 key, the system will automatically exchange the SPECIAL ORDER model number for the actual model number on the customer's ticket.

	Special	Order Updte	11/0	6/06
				¬
AKAMAARTC7121CC	RANGE		30 IN CERAMIC	lla l
∥ AKAMAATB2135HRW	REFRIDGERATOR		21 CU/FT GLASS SHELF WHITI	E
∥ AKAMABM20TBW	REFRIDGERATOR		BOTTOM FREEZER GLASS SHEL	
∥ AKAMABX21TL	REFRIDGERATOR		21 CU FT W ICE MAKER	
∥ AKAMAC70FW	FREEZER		7 CU. FT. CHEST FREEZER	
AKAMADRS2362AC	REFRIDGERATOR		23 CF SXS REFER	
∥ AKAMADRS2663BW	REFRIDGERATOR		26 CF SXS ICE/WTR	
∥ AKAMADRSE663BW	REFRIDGERATOR			
AKAMASCD25TL	REFRIDGERATOR		25 CF TOP MT WATER/ICE	
∥ AKAMASCD25TW	REFRIDGERATOR		25CU. FT. W/ICE&WATER	
∥ AKAMASGD22TW	REFRIDGERATOR		22/CU FT WATER/ICE WHITE	
AKAMASPEC	REFRIDGERATOR		INHSE SPEC ORDER-SEE LEASI	E
∥ AKAMASQD23VL	REFRIDGERATOR		23 CF SXS REFER	
∥ AKAMASQD23VW	REFRIDGERATOR		23 CF SXS REFER	
∥ AKAMASQD25VW	REFRIDGERATOR		25 CU.FT. CUBES\CRUSHED\W	
F1-Forward F	F2-Back F6-Ado	l Item	F10-Exit ENTER-Selec	o+
i i-ronwand i	E-Back FO-Hat	Trem	110-LAIL EIIIEK-SEIEI	

Figure 3-33 Special Order Update Screen with model numbers and descriptions

You can add the item or select an item already in the model number file as seen in Figure 3-33.

Press the F9 key. You will be prompted for "Any More Changes". If you need to make changes, enter a Y and make your changes. When the prompt "Any More Changes" is answered with an "N", the model number will now be exchanged on the ticket. See Figure 3-34. You will now need to deliver the inventory to complete the transaction. See the <u>Chapter 9 Transferring Inventory – INVTRAN & MISCTRAN</u> documentation for instructions on creating a delivery ticket.

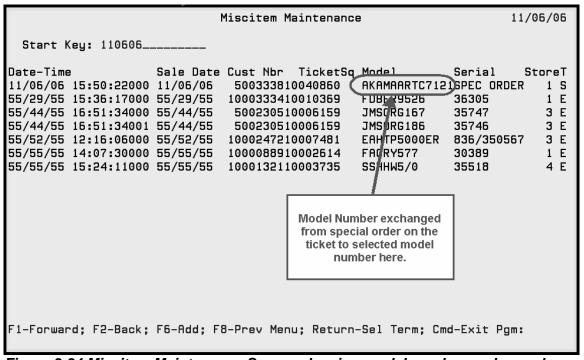


Figure 3-34 Miscitem Maintenance Screen showing model number exchanged

Selling a Package

To sell a package (use the PACKAGE program to create your packages), select SALE off of the menu or press F10 to get to the command line and type in "SALE" and then press ENTER. Select your customer, and enter to the sales screen. See Figure 3-35.

```
Store:
                                   Sales Entry D
                                                                        11/07/06
 Name: BAKER
                        , SHERRY
                                           Acct#:
                                                    5003338
                                                              H Ph: (555)555-5555
  Add: 536 WISTAR CT, NE
                                                              W Ph: (555)555-5555
 City: ANYTOWN
                       TX 55555
                                  License: 1
                                                                 SSAN 000-00-0001
                                                     C1A:
                                                               0C2B:
                                                                         0.00
                 0.00 Taxable Amt:
                                        0.00 Total+Tax:
                                                              0.00 Items Sold: 0
Total Amt:
Desc1:
Model Nbr
                   Serial #
                                   Price
                                             Qty
                                                       Total
                                                              Spiff
                                                                      Del Date
                                   0.000
                                            0.00
                                                        0.00
                                                              0.00
Model Nbr(wildcards allowed), a few characters of the desc, o⊫ F7 for packages
 F1-Next F2-Prev F3-Change F4-Delete F6-Insert F7-Note F8-Backout F9-Done
```

Figure 3-35 Sales Entry Screen

Your cursor will be under the "Model Number" prompt. Press the F7 key and the screen will change to resemble Figure 3-36.

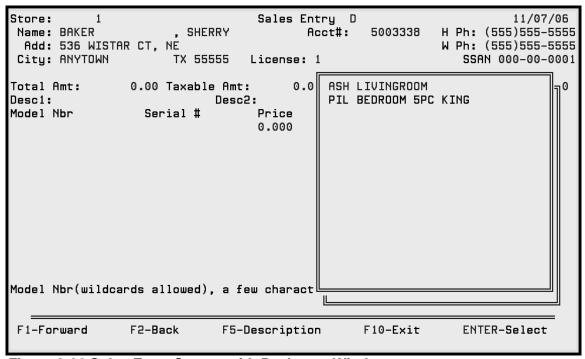


Figure 3-36 Sales Entry Screen with Packages Window

If the page listing is full and you do not see the package you want listed, press the F1-Forward key for more packages. Using your arrow keys to move up and down

select the package you want by pressing ENTER. You can highlight the package you are interested in and press the F5 key to view the description of this package. When you have selected the package you are selling, your screen will change to resemble Figure 3-37.

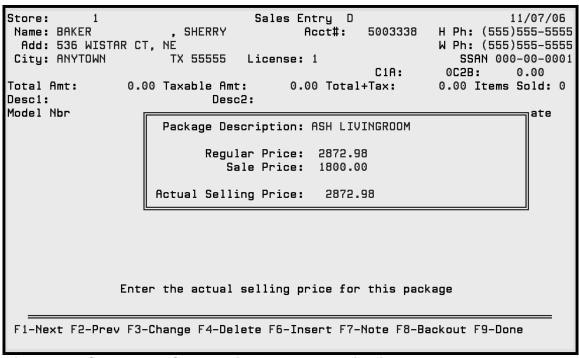


Figure 3-37 Sales Entry Screen with Package Detail Window

If this is the price you are charging for this package, press ENTER or, if you have security to do so, you can change the package price at this point. Once you have the correct price, press ENTER. Your screen will change to resemble Figure 3-38.

```
Store:
                                   Sales Entry D
                                                                         11/07/06
                         SHERRY
 Name: BAKER
                                           Acct#:
                                                    5003338
                                                              H Ph: (555)555-5555
  Add: 536 WISTAR CT, NE
                                                              W Ph: (555)555-5555
 City: ANYTOWN
                       TX 55555
                                   License: 1
                                                                 SSAN 000-00-0001
                                                     C1A:
                                                               0C2B:
                                                                         0.00
             2,872.98 Taxable Amt: 2,872.98 Total+Tax: 3,110.00 Items Sold: 3
Total Amt:
Desc1:
                             Desc2:
Model Nbr
                   Serial #
                                   Price
                                             Qty
                                                       Total Spiff
                                                                      Del Date
FLASH52000
                   STOCK
                               2.340.010
                                            1.00
                                                    2,340.01
                                                               0.00
                                                                      11/07/06
FAPDIPB017
                                           1.00
                                                               0.00
                                                                      11/07/06
                   STOCK
                                  32.980
                                                       32.98
FOHIG324
                   STOCK
                                  499.990
                                           1.00
                                                      499.99
                                                               0.00
                                                                      11/07/06
                                   0.000
                                            0.00
                                                        0.00
                                                               0.00
Model Nbr(wildcards allowed), a few characters of the desc, or F7 for packages
 F1-Next F2-Prev F3-Change F4-Delete F6-Insert F7-Note F8-Backout F9-Done
```

Figure 3-38 Sales Entry Screen with Package Items

Based on your settings in Sales Control (SALECTRL) under "Package Format", the next available serial number for these products may automatically fill in or accept the stock default to assign serial numbers at time of delivery. If you are going to change or assign serial numbers, arrow your cursor up to the model number of the serialized inventory item you want to change and press the F3 key. If you know the serial number you are selling, press ENTER and either scan the serial number or type it in the serial # field; if it is non-serialized, change the serial number to MISC, see Figure 3-39.

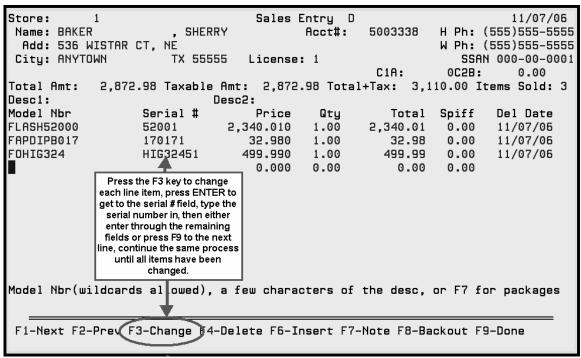


Figure 3-39 Sales Entry Screen assigning serial numbers to package items

If you want to search for a serial number, look the item up by entering "AA"in the serial number field and, press ENTER and use the serial number search feature or with the model number in place for the start key, press the F3 key and search for your serial number, see Figure 3-40 and Figure 3-41.

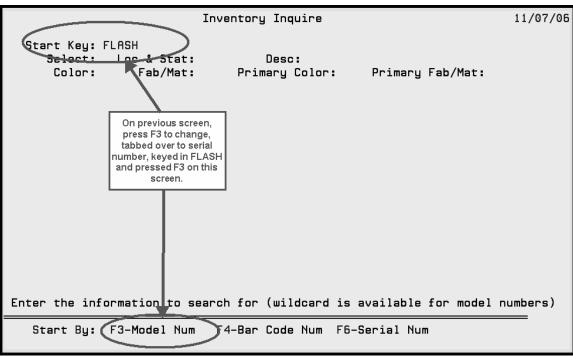


Figure 3-40 Inventory Inquire Screen searching for the serial number for a package item

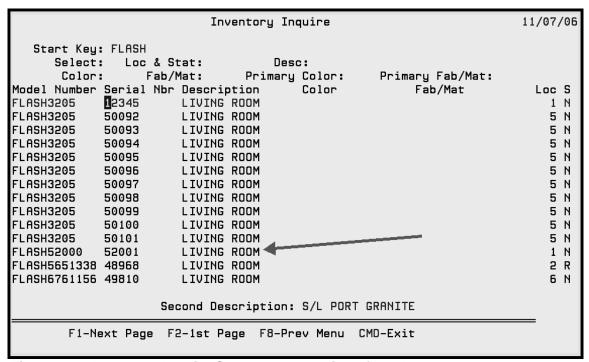


Figure 3-41 Inventory Inquire Screen package item found

When the prompt "Any More Changes" is answered with a "N", your screen will appear like Figure 3-42.

Store: 1		Sales Entry D 11/07/06
Contract:	Tax Code:	C1A: 73.93 C2B: 0.00
Date: 11/07/06		1 Salesman: 998 Tot Price: 2872.98
	Discount:	Tax: 237.02 Total Amt: 3110.00
Pmt 1: 3110.00		Pmt 3: Tick #:
Desc1: ENTERTAIN		
Model Nbr	Serial #	·· -
FLASH52000 FAPDIPB017	52001 170171	
FOHIG324	HIG32451	
T GITTOOL T	111001-101	1331330 1100 133133 0100 11701700
		Enter the amount due
	F5-Help	F8-Back Out CMD-Exit Program

Figure 3-42 Sales Entry Screen with items found

Continue with sale as noted on page 9.

Refunding a Sale (Security Required)

To refund a sale, you need to use the SALE program. To get to the SALE program select it off you menu or press the F10 key and at a command line, type in "SALE" and then press ENTER, see Figure 3-43.

				Custor	mer	Maint	enan	ce				11/0	7/06
Customer	Name/#	:											
F1-Addre	ess F2-	-Drvrs	Lic F	3-SSAN	F4-	Acct	Nbr	F5-Hel	p F	6-Find	by	Phone#	

Figure 3-43 Customer Maintenance Screen

At the Name/# prompt you can enter the customer's name (last name first), account number, address, drivers license number or social security number (use the appropriate function keys to list the customers in the order you wish to view them or press to list them in alphabetical order). You can enter any of these in complete or partial form.

Locate the customer and using your arrow keys, highlight the correct name and press ENTER. At the "Right Customer: Y" prompt, press F3, see Figure 3-44.

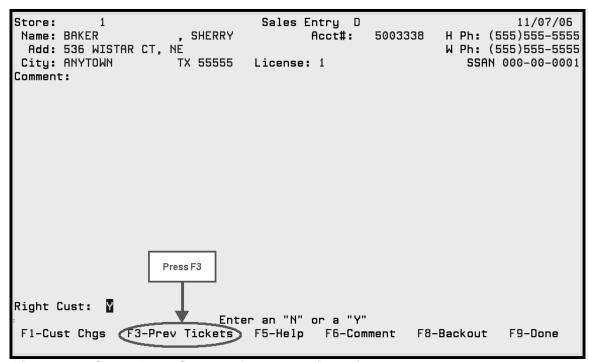


Figure 3-44 Sales Entry Screen display previous tickets

Here you will be prompted to enter the ticket number, see Figure 3-45. If you don't know the ticket number, PO number, or manual reference number, press ENTER and you will get a list of previous tickets for this customer. Use the arrow keys to highlight the ticket you need and press ENTER, see Figure 3-46.

Name:	BAKE	:R	,			Maintena Acct#:	nce 5003338		11/07/06
		Enter t	he ir	Nbr: nvoice numb -Cust/Ticke	er or da		 gin listing	with	

Figure 3-45 Sales Ticket Maintenance Screen

```
Sale Ticket Maintenance
                                                                      11/07/06
Name: BAKER
                      , SHERRY
                                         Acct#:
                                                  5003338
                                              Amt PO Number
                                                                   Reference#
   Cust # Ticket# Seq Cont Store Date
   5003338 10040860
                             1 11/06/06
                                          1471.12
  5003338 10040862
                             1 11/07/06
                                          3110.00
                        Customer Has No More Tickets
F1-Forward F2-Back F5-Help F8-Prev Menu Return-Sel Term Cmd-Exit Pgm
```

Figure 3-46 Sales Ticket Maintenance Screen with data

Notice the prompts at the bottom of the screen; press the F6 key to enter Refund Mode. Press the F3 key to refund an item, or press the F4 key to refund all. You will now see a "Y" in the RF column on the screen, see Figure 3-47.

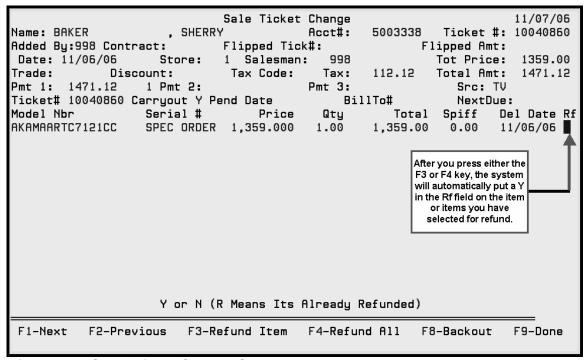


Figure 3-47 Sales Ticket Change Screen

If everything is correct, press the F9 key for "Any More Changes". If you need to make changes, enter a Y and make your changes. When the prompt "Any More Changes" is answered with an N, the screen should now resemble Figure 3-48.

```
Sale Ticket Change
                                                                    11/07/06
                     , SHERRY
Name: BAKER
                                                 5003338
                                                           Ticket #: 10040860
                                        Acct#:
Added By:998 Contract:
                            Flipped Tick#:
                                                        Flipped Amt:
Date: 11/06/06
                  Store:
                             1 Salesman:
                                           998
                                                          Tot Price: 1359.00
                                                 112.12
                                                          Total Amt: 1471.12
Trade:
             Discount:
                             Tax Code:
                                          Tax:
Pmt 1: 1471.12 1 Pmt 2:
                                        Pmt 3:
                                                             Src: TV
Ticket# 10040860 Carryout Y Pend Date
                                            BillTo#
                                                            NextDue:
                                          Qty
Model Nbr
                  Serial #
                             Price
                                                 Total Spiff
                                                                  Del Date Rf
AKAMAARTC7121CC
                  SPEC ORDER 1,359.000
                                         1.00
                                                            0.00
                                                                  11/06/06 Y
                                                 1.359.00
Any More Changes: N
                        F3-Refund Item
                                        F4-Refund All
 F1-Next
          F2-Previous
                                                        F8-Backout
                                                                    F9-Done
```

Figure 3-48 Sales Ticket Change Screen completion

Use the ENTER key to move through the fields. The refund amounts will default to the original sale ticket values, except they will be negative because this is a refund. If you are only refunding an item, you will need to change Payment Form 1 to reflect that total amount with a minus behind the dollar amount. Note that the total amount in the Payment 1, 2 and 3 areas must equal the "Total Amt" on the screen and must be negative before you can complete the transaction. Be sure to transfer the refunded inventory to the correct location, see Figure 3-49.

```
In Refund Mode
                           Sale Ticket Change
                                                                 11/07/06
                   , SHERRY
                                                        Ticket #: 10040860
Name: BAKER
                                      Acct#:
                                              5003338
Added By:998 Contract:
                           Flipped Tick#:
                                                     Flipped Amt:
Date: 11/07/06 Store:
                           1 Salesman:
                                                       Tot Price: 1359.00-
                                          - 1
Trade:
            Discount:
                            Tax Code:
                                        Tax:
                                              112.12- Total Amt: 1471.12-
Pmt 1: 1471.12- 1 Pmt 2:
                                      Pmt 3:
                                                          Src: TV
Ticket# 10040860 Carryout Y Pend Date
                                          BillTo#
                                                          NextDue:
                                              Total Spiff Del Date Rf
Model Nbr
                 Serial # Price
                                        Qty
                                                              11/06/06 Y
AKAMAARTC7121CC
                 SPEC ORDER 1,359.000 1.00
                                               1,359.00 0.00
                   Return Loc: 1 Return Status: R
              Enter Return Location for Serialized Inventory
F5-Help F8-Backout Arrow Keys-Positioning Return-Next Field CMD-Exit Pgm
```

Figure 3-49 Sales Ticket Change Screen completion

Press the F9 key and you will be prompted "Any More Changes". If you need to make changes, enter a Y and make your changes. When the prompt "Any More Changes" is answered with an "N", the refund will be completed and a receipt will be printed.

Figure 3-50 shows how your ticket listing will look after you have refunded the sale.

```
Sale Ticket Maintenance
                                                                                         11/07/06
Name: BAKER
                            , SHERRY
                                                    Acct#: 5003338
    Cust # Ticket# Seq Cont Store Date
                                                           Amt PO Number
                                                                                      Reference#

      5003338
      10040860
      1
      11/06/06

      5003338
      10040860
      1
      1
      11/07/06

                                                      1471.12
                                     1 11/07/06
                                                     1471.12-
   5003338 10040862
                                     1 11/07/06
                                                     3110.00
                               Customer Has No More Tickets
F1-Forward
              F2-Back F5-Help F8-Prev Menu Return-Sel Term Cmd-Exit Pgm
```

Figure 3-50 Sales Ticket Maintenance Screen listing tickets for customer

Using an A/R payment form when posting a sale

If you select an AR payment form for the sale, you will create an A/R ticket. An A/R sale must follow these rules:

- 1. The items sold can be special order, layaway, stock, serialized or miscellaneous.
- 2. A valid A/R payment form must exist in the payment form control record. Your company should already have these set up for you, if not, and if you have the security to do so, you may add A/R payment forms using the Payment Forms PMTFORMS program.
- 3. A/R payment forms should only be used after cash payment forms. Note in the example (see Figure 3-51), down payment is in PMT 1 and PMT 2 is the AR charge amount. If there is no down payment, use PMT 1. (amt to allocate is at zero).

When you enter an A/R payment form, you will be asked to enter additional account information for setting up and tracking the A/R at the bottom of the screen. Note: Some of these fields may already be populated with defaults; depending on your security authorization, you may or may not be able to change them. Following is an example of the screen you will get when you choose an A/R payment form, see Figure 3-51.

Store: 1		Sales E	ntry D			12/27/04
			_	C1A: 3	5.71 C2B:	0.00
Contract:	Tax Code:					
Date: 12/27/04	Store: 1	Salesman	1		Tot Price:	293.30
Trade:	Discount:		Tax:	16.42	Total Amt:	309.72
Pmt 1: 50.00	1 Pmt 2: 25	9.72 25	Pmt 3:		Tick #:	
Tender 50.00 Cng	g 0.00			Amt To	Allocate:	0.00
Model Nbr	Serial #	Price	Qty	Total	Spiff D	el Date
DELATLPA646AW	MISC	293.300	1.00	293.30	0.00 1	2/27/04
Acct Mngr: 2 Cus Nxt Due: 1/26/05 Grp: Ins		N Rate:	0.000 Pm1	: Amt:	0.00	
Ente	r the customer F5-Help F8-				sting	

Figure 3-51 Sales Entry Screen using an A/R pmt form when posting a sale

An explanation of how to fill out the A/R information follows.

ACCT MNGR This is the account manager that will be assigned to this account, If the default account manager number is not there and if you don't

know their number, press ENTER and you will get a listing of all valid account managers. Using the arrow keys, place your cursor on the one you want, and press ENTER.

CUST TYPE This is the customer type. You may have customer types such as layaway, commercial, finance company, etc. If the default customer type isn't already there and you do not know the code, press ENTER to get a window. Using the arrow keys, place your cursor on the one you want, and press ENTER.

CONTRACT TYPE This is the contract type. If the default contract type is not there and if you do not know the contract type press ENTER and you will get a listing of all valid contract types. Using the arrow keys, place your cursor on the one you want, and press ENTER. See Figure 3-52. Use your arrow keys to highlight the one you want to choose, press ENTER to select it.

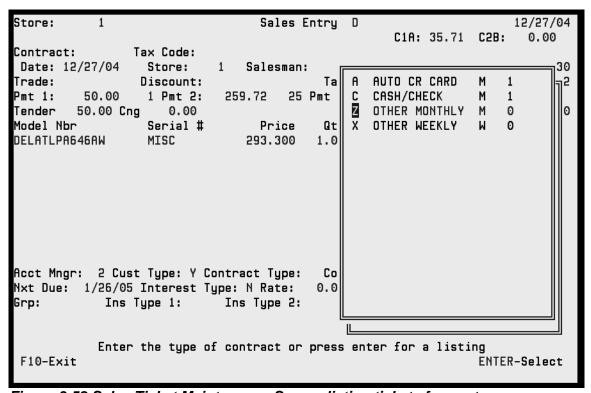


Figure 3-52 Sales Ticket Maintenance Screen listing tickets for customer

CONTRACT LENGTH This field will default to a number as defined in contract type, if you choose contract type X (other weekly) or Z (other monthly), the cursor will go to contract length; enter the length of the contract in number of weeks or months.

PMT TERMS If the default payment terms are not there, you may press enter for a listing. The options for Monthly terms are M=Monthly, S=Semimonthly, A=Semi-Annually, Q=Quarterly and Y=Annually, The options for Weekly are W=Weekly, B=Bi-weekly and D=Daily.

INTEREST TYPE This is the interest type as set up in the payment form.

This is the interest rate you are charging as set up in the payment form

PMT AMT

This figure is automatically calculated based on the contract length and payment terms. Any applicable interest, based on the payment form you chose, will be added to the payment.

NEXT DUE The next due date is automatically calculated, based on the payment terms you chose, and default due days set in PMTFORMS. If you want to change the next due date, you may do so at this point.

GRP This is the amount of the Guaranteed Repair Policy GRP or Waiver of Liability. This is a fee you can charge as an add-on to an AR transaction. These rates are usually automatically calculated, based upon the formula specified in the payment control record that has been set up in PMTFORMS. The ability to change or modify GRP is a security controlled feature.

INS TYPE 1 This field is used for any additional insurance the customer may elect to carry on the AR contract, such as Life or Disability (tied to the payment form selected and is set up in the PMTFORMS program). Note: Special programming may be required.

INS TYPE 2 Additional insurance fee field.

INS TYPE 3 Additional insurance fee field.

INS TYPE 4 Additional insurance fee field.

You will then be prompted for Any More Changes. If you need to make changes, enter a Y and make your changes. If there are no changes necessary, press ENTER.

To process A/R payments, use the RP program. See *Chapter 5 Taking Payments - RP* for more information.

MAP/MOP

The RSSS System allows employees with proper security clearance to change prices. This is usually the case, when a company allows price negotiation. RSSS uses the pricing system MAP/MOP, which controls price negotiation. Management sets predetermined pricing levels for each item.

MAP refers to Minimum Acceptable Price and is the lowest price an employee may negotiate.

MOP refers to Manager Over-ride Price and is the lowest price that a manager may authorize.

The MAP & MOP Prices are set up on each individual model number in the Item Maintenance (ITEMMNTS) program, see Figure 3-53.

Model Number Change				
UPC Code:				
Model Number:	AKAMAARR3100L Commission Code:	1		
Description:	RANGE Vendor Number:	1		
	30" STD. RANGE Discontinued Indr:	N		
First Received:	Serialized:	Υ		
Average Cost:	210.810 Last Cost: 210.810 Reg Price:	699_990		
_	599.990 MAP: 499.99 MOP:			
	799.99 # Months For Dep:			
	1 Percent: 0.00 Qty On Hand:	1		
	Y Tax %: 0.00 Use Profit Center:	Ÿ		
Equivalent:	Movie Inv Type: I	•		
Sales Spiff:	0.00 RTO Spiff:			
RTR Monthly Prc:	93952.99 RTO Monthly Terms:			
Total Monthly Pro:		78		
Total Weekly Pro:		0		
Cube Size:	Nbr of Pcs: 0 Date Order Due In:	0		
Days Out of Stock:	Furn Style: Unit Weight:			
No Sale Discounts:	n			
Gl Account Nbrs:				
	, , , , , , , , , , , , , , , , , , ,			
	(ey in or scan the UPC code or press return			
F5-Help	F7-Warranty F8-Prev I	F10-Exit		

Figure 3-53 Model Number Change Screen viewing MAP/MOP pricing

These prices can be set up for a negotiating sales floor. An employee with the security to change a price may enter a price anywhere between the normal sales price and the MAP price. A manager may override this, and go below the MAP price, down to the MOP price. The final individual security level is Owner Override (any price).

You can calculate prices at specific gross margin levels by pressing the F3 key, see Figure 3-54.

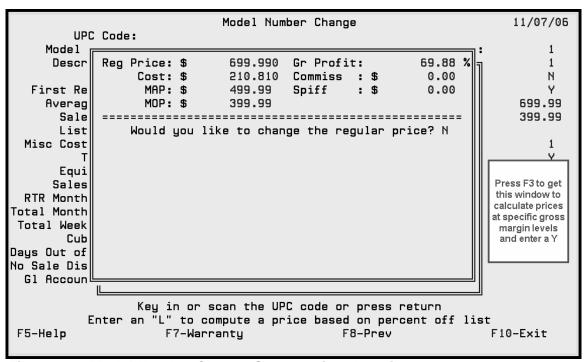


Figure 3-54 Model Number Change Screen price changing

If you want to change the price by changing it to a specific price, enter a "Y", see Figure 3-55. If you want to change the price by a percentage, enter an "L" to compute a price based on percent off list.

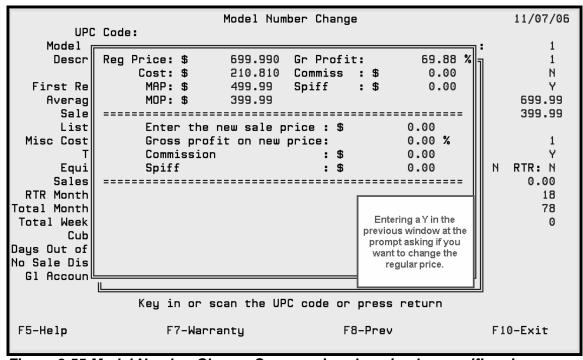


Figure 3-55 Model Number Change Screen price changing by specific price

Enter the price you want to change it to and press ENTER. Your screen will change to resemble Figure 3-56.

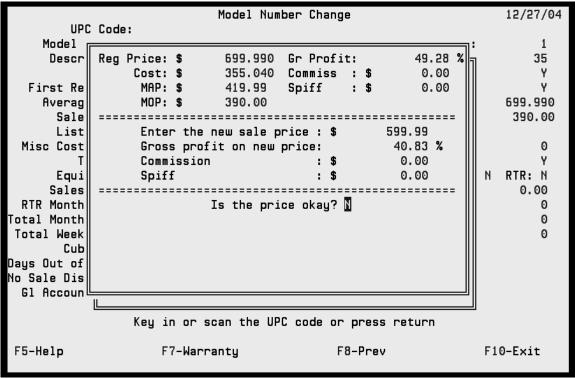


Figure 3-56 Model Number Change Screen changing price

If this is the price you want to change it to, enter a "Y". If not, enter an "N" and your cursor will go back up to the prompt for the new sale price.

If you want to change the price by a percentage of the list, enter an "L". Your screen will change to resemble Figure 3-57.

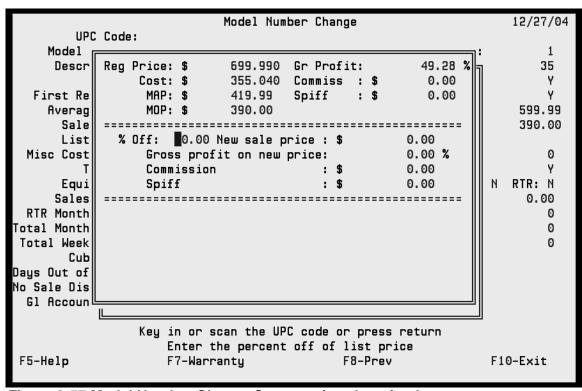


Figure 3-57 Model Number Change Screen price changing by a percentage

Enter the percentage you want taken off the regular price and press ENTER. Your screen will change to resemble Figure 3-58.

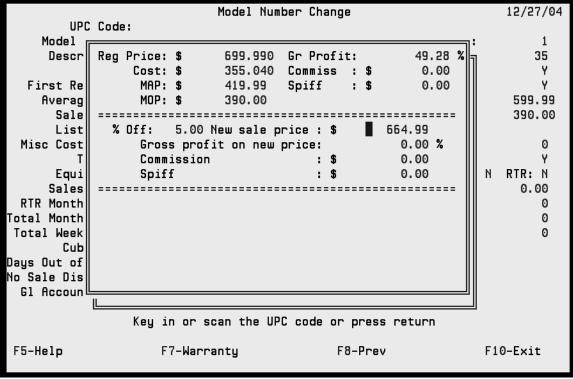
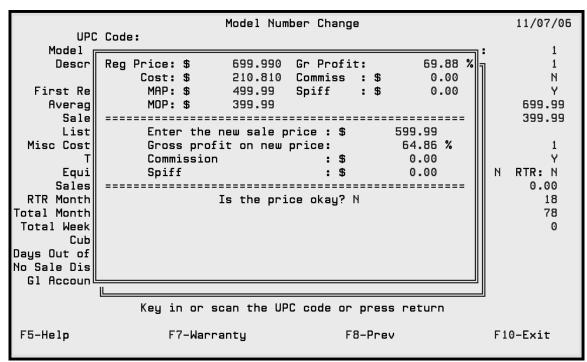


Figure 3-58 Model Number Change Screen new changed price percentage
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Press ENTER and your screen will change again, see Figure 3-59.

Figure 3-59 Model Number Change Screen gross profit figure for price changed

If this is what you want the sale price changed to, enter a "Y". If not enter an "N" and you will be taken back to the prompt asking for the percentage off again.

Using the MAP/MOP feature when processing a sale

When doing an actual sale, using the sale program, after you have entered the item the customer is purchasing with your cursor at the Price prompt, you can enter in a lower price in place of the regular price. You will see a screen similar to Figure 3-60.

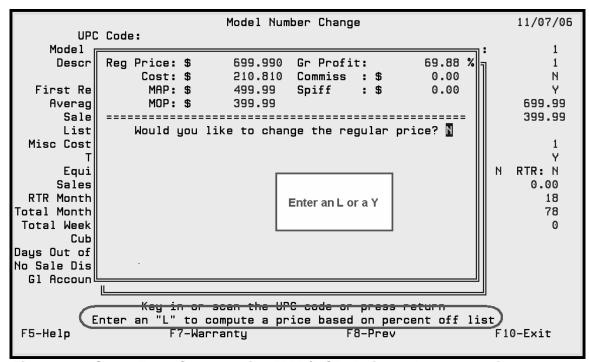


Figure 3-60 Sales Entry Screen using MAP/MOP during sales transaction

If you want to change the price by changing it to a specific price, enter a "Y". If you want to change the price by a percentage, enter an "L" to compute a price based on percent off list. Change what is necessary and press ENTER through. Note: The cost display is based on individual security level.

If this screen does not appear for you, you have the OWNER OVERRIDE OK field on the Security Maintenance (SECMNT) Sale Program screen set to Y. When this field is set to N, the window screen in Figure 3-60 will appear to allow you to change the price.

The C1A and C2B fields on the SALE screen are for commissioned employees and show the amount of Gross Profit and Commission on each item on the screen, see Figure 3-61. This feature will only work for the commission, if the employee is set up for commission in Employee Maintenance (EMPMNT). The actual item within Item Maintenance (ITEMMNTS) also has to be set up with a commission code other than 'no commission'. Also, each amount changes with each line item and only shows the total for the sale on the second page of the sales screen.

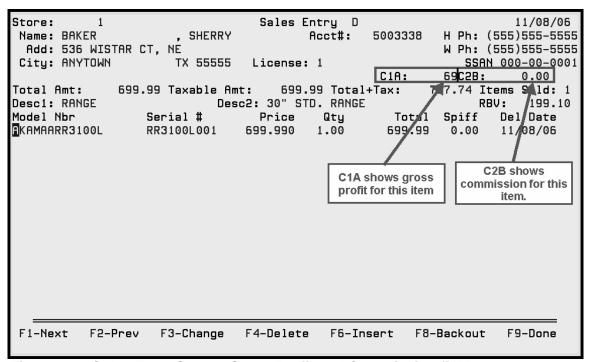


Figure 3-61 Sales Entry Screen Gross Profit and Commission fields

You may also change the price on the second page of the SALE screen by altering the total price and/or total amount fields, see Figure 3-62. The MAP and MOP rules are also enforced in this area, see Figure 3-63. The system automatically adjusts the sales tax to reflect either the total price or total amount changes.

When more than one item sold, the system will proportionally adjust the individual items price based on the setting in Sales Control (SALECTRL) "RDPrice:".

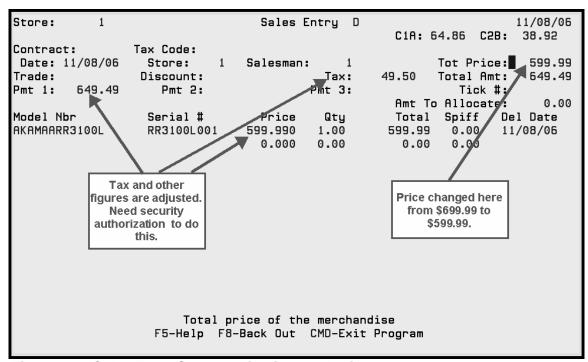


Figure 3-62 Sales Entry Screen adjusting total price

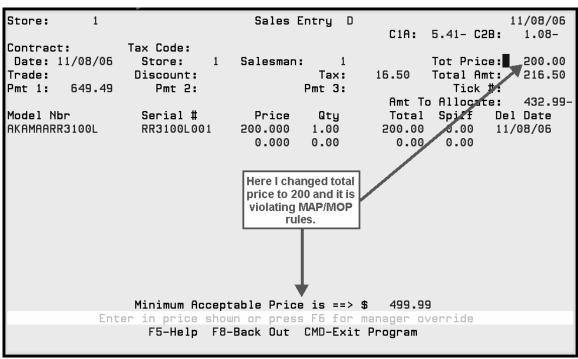


Figure 3-63 Sales Entry Screen adjusting total price

Trade-In Program

To take a trade-in towards the sale of inventory, you need to go into the "Post a Sale" program also known as the SALE program. See Figure 3-64.

```
Store:
                                   Sales Entry D
                                                                        11/08/06
 Name: BAKER
                       , SHERRY
                                          Acct#:
                                                   5003338
                                                             H Ph: (555)555-5555
  Add: 536 WISTAR CT, NE
                                                             W Ph: (555)555-5555
 City: ANYTOWN
                       TX 55555
                                  License: 1
                                                                SSAN 000-00-0001
                                                              0C2B:
                                                    C1A:
                                                                        0.00
                                        0.00 Total+Tax:
                                                             0.00 Items Sold: 0
Total Amt:
                 0.00 Taxable Amt:
Desc1:
Model Nbr
                   Serial #
                                   Price
                                            Qty
                                                      Total
                                                             Spiff
                                                                     Del Date
                                   0.000
                                           0.00
                                                       0.00
                                                             0.00
Model Nbr(wildcards allowed), a few characters of the desc, or F7 for packages
 F1-Next F2-Prev F3-Change F4-Delete F6-Insert F7-Note F8-Backout F9-Done
```

Figure 3-64 Sales Entry Screen for a customer

Enter items to be sold as shown on <u>page 6</u> and press the F9 KEY enter on the "Any More Changes" prompt. See Figure 3-65.

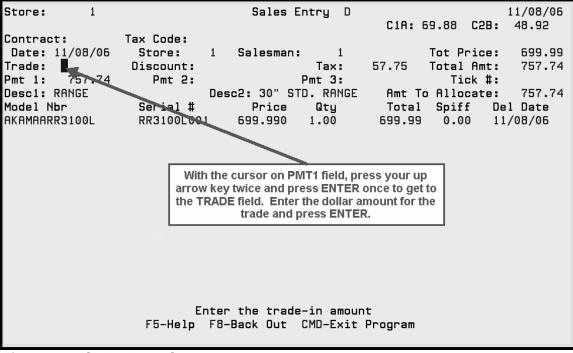


Figure 3-65 Sales Entry Screen

Your cursor will be at the "Pmt 1" field. Press your up arrow key twice and press ENTER to get to the prompt "Trade". Enter the dollar amount you are giving the

customer for his trade-in and press ENTER. Your screen will change to resemble Figure 3-66.

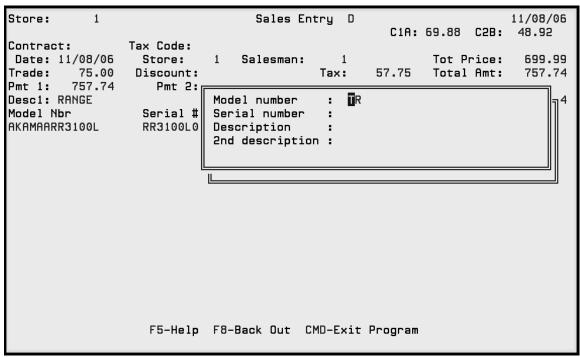


Figure 3-66 Sales Entry Screen Trade-in Window

The product code TR is automatically setup in the model number field. This is hard-coded and also interfaces with the trade-in markup percentage that is set up in Sales Control (SALECTRL).

Enter the information about the trade-in item, see Figure 3-67.

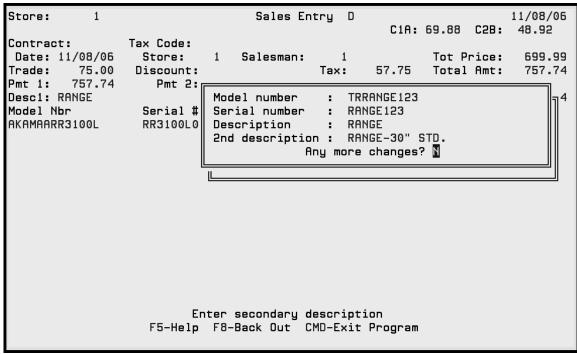


Figure 3-67 Sales Entry Screen with Trade-in Window entering trade-in data

When you have entered all the information on the trade-in, you will be prompted for "Any More Changes". If you need to make changes, enter a "Y" and make your changes. When the prompt "Any More Changes" is answered with an "N", your cursor will be moved to the Discount prompt. Continue with the sale as shown in Figure 3-68.

Store: 1		Sales Entry D 11/08/06 C1A: 69.88 C2B: 48.92
Contract: Date: 11/08/06 Trade: 75.00 Pmt 1: 682.74	Store: 1 Discount:	Salesman: 1 Tot Price: 699.99 Tax: 57.75 Total Amt: 682.74 Pmt 3: Tick #:
Model Nbr AKAMAARR3100L		Amt To Allocate: 0.00 Price Qty Total Spiff Del Date 699.990 1.00 699.99 0.00 11/08/06
		CASH CHECKS 002 MONEY ORDERS CHARGE CARDS NON CASH REFUND CASH REFUND FREE PAYMENT MIXED (CASH & CHECK) FIELD CASH 000 001 005 006 008 009 009 009
Enter F1-Forward	a payment form F2-Back	or press enter to choose from a list F10-Exit ENTER-Select

Figure 3-68 Sales Entry Screen with Payment Form Window

Using wildcards in SALE

When making a sale, you have the ability to use "wildcards (*)" to search for inventory. These wildcards (*) can be used in the place of the product code and/or manufacturer code. In the following example, the salesman is unsure of the product code and manufacturer but knows the model number assigned at the factory began with the number five. Therefore, he enters ** for the product code & *** for the manufacturer and the number 5 for the first character of the model number assigned at the factory, see Figure 3-69.

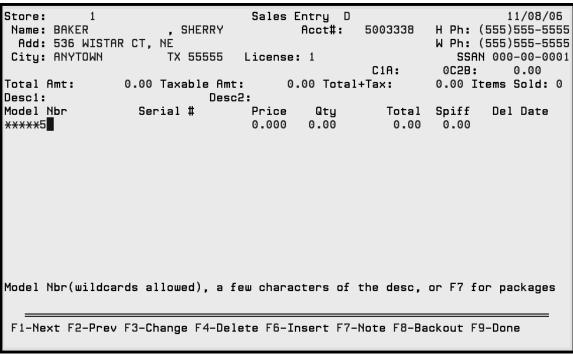


Figure 3-69 Sales Entry Screen wildcard search on model number

After entering "****5", press ENTER. You will be prompted to "Select sequence: (M)odel Number or (D)escription => D". Enter "M". Your screen will change to resemble Figure 3-70.

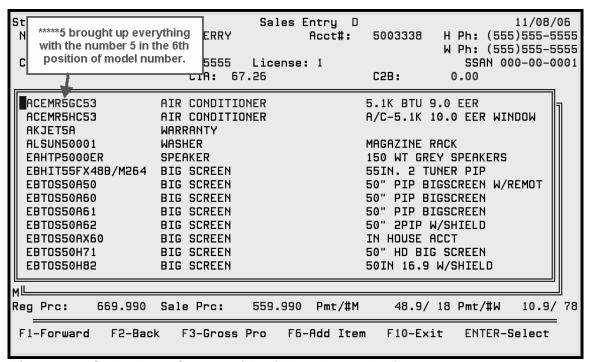


Figure 3-70 Sales Entry Screen with wild card search window

Example of a wild card search by manufacturer, see Figure 3-71 and Figure 3-72.

```
Store:
                                  Sales Entry D
                                                                      11/08/06
                                                  5003338
                                                            H Ph: (555)555-5555
Name: BAKER
                                         Acct#:
 Add: 536 WISTAR CT, NE
                                                            W Ph: (555)555-5555
City: ANYTOWN
                      TX 55555
                                 License: 1
                                                               SSAN 000-00-0001
                                                   C1A:
                                                             0C2B:
                                                                       0.00
Total Amt:
                0.00 Taxable Amt:
                                       0.00 Total+Tax:
                                                            0.00 Items Sold: 0
Desc1:
                            Desc2:
Model Nbr
                  Serial #
                                  Price
                                           Qty
                                                     Total Spiff
                                                                    Del Date
**ASH
                                                      0.00 0.00
                                  0.000
                                          0.00
Model Nbr(wildcards allowed), a few characters of the desc, or F7 for packages
F1-Next F2-Prev F3-Change F4-Delete F6-Insert F7-Note F8-Backout F9-Done
```

Figure 3-71 Sales Entry Screen wild card search by manufacturer

**ASH brought up manufacturer list. ASH stands for Ashley.	, SHERRY , NE TX 55555 C1A: 77.		WPI	11/08/06 h: (555)555-5555 h: (555)555-5555 SSAN 000-00-0001
FAASHL120714 FAASHL234984 FAASHL271634 FAASHL2899 FAASHL305164 FAASHL317894 FAASHL408951 FAASHL433354 FAASHL512434 FBASH216 FBASH312 FBASHASB488 FBASHB03-31	LAMPS BEDROOM SET BEDROOM SET BEDROOM SET		CERAMIC DBL GOI TBL LMP POLYE PALMTREE LAMPS SILVER/MULTI CI METAL LAMPS METAL/BEAR/SHAI FLR ANTQ BRNZ ART GLASS POLY SWIRL 5PC BLK GATOR 5PC CARMEL STOI 6PC SERENGETI S	TURN WOOD LR LAMPS DE
ML Reg Pro: 312.000	Sale Prc:	156.000 Pmt/#M	17.3/ 18 Pi	mt/#W 4.0/ 78
F1-Forward F2-Bac	k F3-Gross P	ro F6-Add Ite	m F10-Exit	ENTER-Select

Figure 3-72 Sales Entry Screen with wild card search by manufacturer listing