

Orders and Layaways

There are **2** General Uses for Orders & Layaways

Typically if you are selling a one-time special order item such as a yearbook, varsity jacket, or an apparel item personalized for a specific customer, then Orders fit the bill perfectly.

A second use for the Order function will be with sales from a “Satellite” location, such as an athletic venue, the cafeteria, a hallway, or any location outside of your store without using your POS station(s) for sales.

To use the Order function, you will need to have the POS_PRO version of the PFW software installed. **If you have the POS_BASIC version of PFW installed, you can use the Layaway function to accomplish the same basic activities.**



Orders and Layaways

Example 1 – Selling a special order shirt, A jersey, with a personalized number and name printed on the garment. Assume you have a local apparel supplier that agrees to custom print jerseys individually either for a special limited time or on a regular basis.

First you will need to create a set of inventory SKUs for various sizes of the special order jersey. Example, for a Central HS Football Jersey Blue Small = “CFJBS”, with the Medium “CFJBM”, Large “CFJBL” and so on for all the sizes offered. Lets assume a item has a cost of \$21.00 and a retail price of \$30.00.

Then create an item and SKU for the Custom Number on the Front and Back, or SKU “CNFB”. With a cost of \$4.00 and a retail of \$6.00.

Then create an item and SKU for the Custom Name to be placed on the back shoulder to shoulder, or SKU “C NAME”, again a similar cost \$4.00 and retail \$6.00 for any length name up to 12 characters.

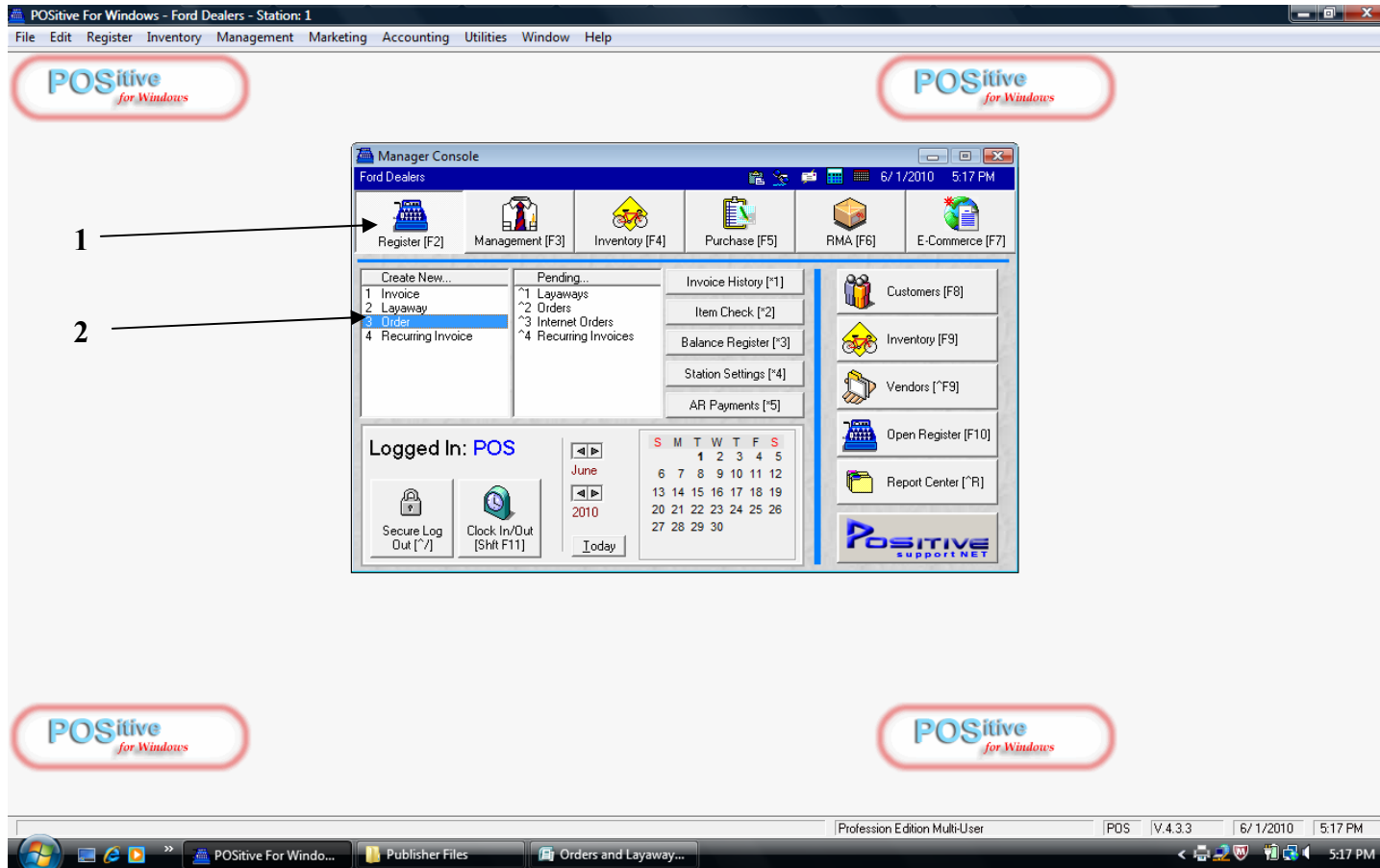
Orders and Layaways

Important things to remember:

1. Bar-code labels can be created to scan on a master sheet or on 3" x 5" cards when creating individual order sales transactions.
2. Special Notes and Comments can be added when sold.
3. You may wish to add a special policy statement @ the bottom of your Order-Layaway receipt stating. "No returns on Special Orders"
4. All Orders will be assigned to a specific customer who will need to be added to your master Customer List.
5. Many schools require a deposit or payment in full with any special orders since these items are consumer specific and will not be able to be transferred to another customer.
6. All Special Orders will be placed in a Pending file until the Order has been received, converted, and finalized to an actual sale.

Orders and Layaways

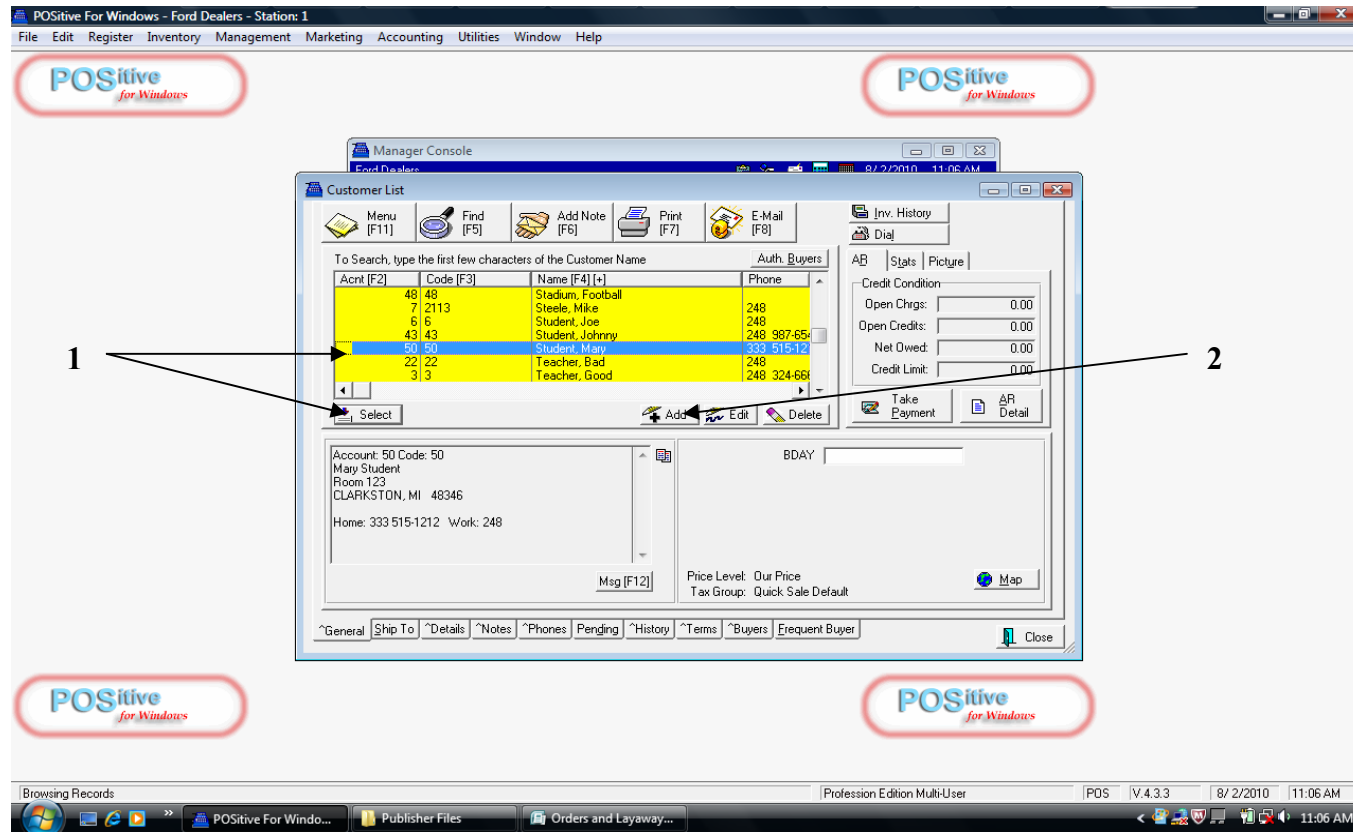
4



To record a Special Order or Layaway for a customer, from the Manager Console Screen

1. Click the **Register Center [F2]**
2. Select the **Orders (or Layaway)** from the options in Column One [Current Items] - arrow down and click enter.

Orders and Layaways



Your Customer List will appear

1. Locate the **Current Customer** from the list and click the **Select button**.
2. If the **Customer is new**, click the **Add button** to add them to your list.

Orders and Layaways

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The screenshot shows the POS software interface. At the top, there is a menu bar with options: File, Edit, Register, Inventory, Management, Marketing, Accounting, Utilities, Window, Help. Below the menu bar, there is a status bar displaying "[ESC] Menu", "Order: 748 By: PDS Date: 8/ 2/2010 Register: 1", and a search field containing "SCAN".

The main area is a table with columns: Description, Quantity, Price, Dsc.%, and Total. The table is currently empty.

Below the table, there is a section for customer information. A blue box highlights the following details:

- Bill To | Ship To | Note
- Account: 50 Code: 50
- Mary Student
- Room 123
- CLARKSTON, MI 48346
- Home: 333 515-1212 Work: 248
- Terms: NONE

To the right of the customer information, there are several buttons: Show More Options [F2], Select Bill To [F3], Edit Bill To [F4], Customer History [F5], Adjust Quantity [F6], Balance Register [F7], Discount [F8], and Void Transaction [F9].

At the bottom left, there is a summary table:

Line Totals:	0.00	Sub Total:	0.00
Taxable:	0.00	- Coupon:	0.00
Exempt:	0.00	- Deposit:	0.00
Item Count:	0.00	Total:	0.00

At the bottom right, there is a large green display showing "0.00" and a "Save [F10]" button.

The taskbar at the bottom shows the following applications: POSitive For Windo..., Publisher Files, and Orders and Layaway... The system tray shows the date and time: 8/ 2/2010 11:08 AM.

On the Order Screen or Layaway Screen:

1. The **Customer Name** appears in the blue area on the lower left.

Orders and Layaways

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Description	Quantity	Price	Dsc.%	Total
CENTRAL FBALL JERSEY BLUE MED	1	30.00	0.00	30.00
CUSTOM NUMBER FRONT & BACK	1	6.00	0.00	6.00

2 →

Enter Note

Customer Number 28

OK [F10] Cancel

Line Totals:	36.00	SubTotal:	36.00
Taxable:	0.00	- Coupon:	0.00
Exempt:	0.00	- Deposit:	0.00
Item Count:	2.00	Total:	36.00

36.00

Save [F10]

On the Order or Layaway Sales Screen:

1. Scan or type in the Special Order Items SKUs for the Order
2. **Add a Note** (hot key or Ctl N) to list the specifics for any line item such as the jersey number or name to appear on the back of the customer's order.

Orders and Layaways

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1

Description	Quantity	Price	Dsc.%	Total
CENTRAL FBALL JERSEY BLUE LARGE	1	30.00	0.00	30.00
CUSTOM NUMBER FRONT & BACK	1	6.00	0.00	6.00
CUSTOM NAME BACK	1	6.00	0.00	6.00

2

On the Order or Layaway Sales Screen:

1. Details for the Special Order now appear on the Invoice.
2. Click the **Save button** or the **F10 key** to save and place the order.

Orders and Layaways

The screenshot shows the POS software interface for Ford Dealers. A calendar pop-up window is open, displaying the month of August 2010. The date August 20, 2010, is highlighted in yellow. The main window shows a transaction for 'CENTRAL FBALL JERSEY' with a total of 42.00. The interface includes a menu bar, a description field, a customer name field, and a total field. A 'Save [F10]' button is visible in the bottom right corner.

1

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A calendar will pop up with the current month. Future months are also available to select from.

1. Project a **Delivery Date** and highlight it in yellow.
2. Select it by clicking the **OK button or F10 key**.

Orders and Layaways

The screenshot displays the POS software interface for 'Ford Dealers - Station: 1'. The main window shows an order summary with the following items:

Description	Quantity	Price	Dsc. %	Total
CENTRAL FBALL JERSEY BLUE LARGE	1	30.00	0.00	30.00
CUSTOM NUMBER FRONT & BACK	1	6.00	0.00	6.00
Customer Number 28				
CUSTOM NAME BACK	1	6.00	0.00	6.00
Name Lewis				

A 'Payment Amount' dialog box is open, prompting the user to enter the total amount to be paid. The 'Total To Pay' field is set to 42.00. The dialog box includes 'OK' and 'Cancel' buttons. A red arrow labeled '1' points to the dialog box, and a red arrow labeled '2' points to the 'OK' button.

The bottom right of the screen shows a large green '42.00' and a 'Save [F10]' button. The status bar at the bottom indicates 'Profession Edition Multi-User', 'POS V.4.3.3', '8/1/2010', and '12:15 AM'.

A Positive Alert will Appear asking to Apply a Payment. Most schools require a partial or full payment at the time of the order..

1. When Prompted **Enter the Deposit Amount**
2. Click **OK** to accept the deposit amount.

Orders and Layaways

The screenshot displays the POS software interface with an 'Invoice Tender' dialog box open. The dialog box contains a list of tender types and their amounts. The 'Cash' tender type is selected, with an amount of 42.00. The 'Balance Due' is 42.00. The background shows a sales order for 'CENTRAL FBALL JERSEY BLUE LA' with a total of 30.00 and a deposit of 6.00. Numbered callouts 1, 2, and 3 point to the tender list, the amount field, and the OK button respectively.

Tender Type	Amount
Cash	42.00
Check	0.00
Visa	0.00
Master Card	0.00
Debit Card	0.00
Internal Transfer	0.00

Balance Due: 42.00

Total Due: 42.00

OK [F10]

If you take a Deposit the Tender screen appears.

1. Select the tender type from the list presented. Click until the tender line appears blue and yellow.
2. Click **Enter** to accept the default tender amount, or enter the amount if different.
3. Click **OK F10** to accept the tender.

Orders and Layaways

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The screenshot shows the POS software interface for 'Ford Dealers - Station: 1'. The main window displays an order summary with the following items:

Description	Quantity	Price	Dsc. %	Total
CENTRAL FBALL JERSEY BLUE LARGE	1	30.00	0.00	30.00
CUSTOM NUMBER FRONT & BACK	1	6.00	0.00	6.00
Customer Number 28				
CUSTOM NAME BACK	1	6.00	0.00	6.00

The customer name is Lewis. A 'Change Due' dialog box is open, showing a balance of 0.00. A 'POStive Alert' dialog box is also open, asking 'Do you want to print this Order?' with 'Yes' and 'No' buttons. A red arrow points to the 'Yes' button. The bottom of the screen shows a summary table and a large green '42.00' total.

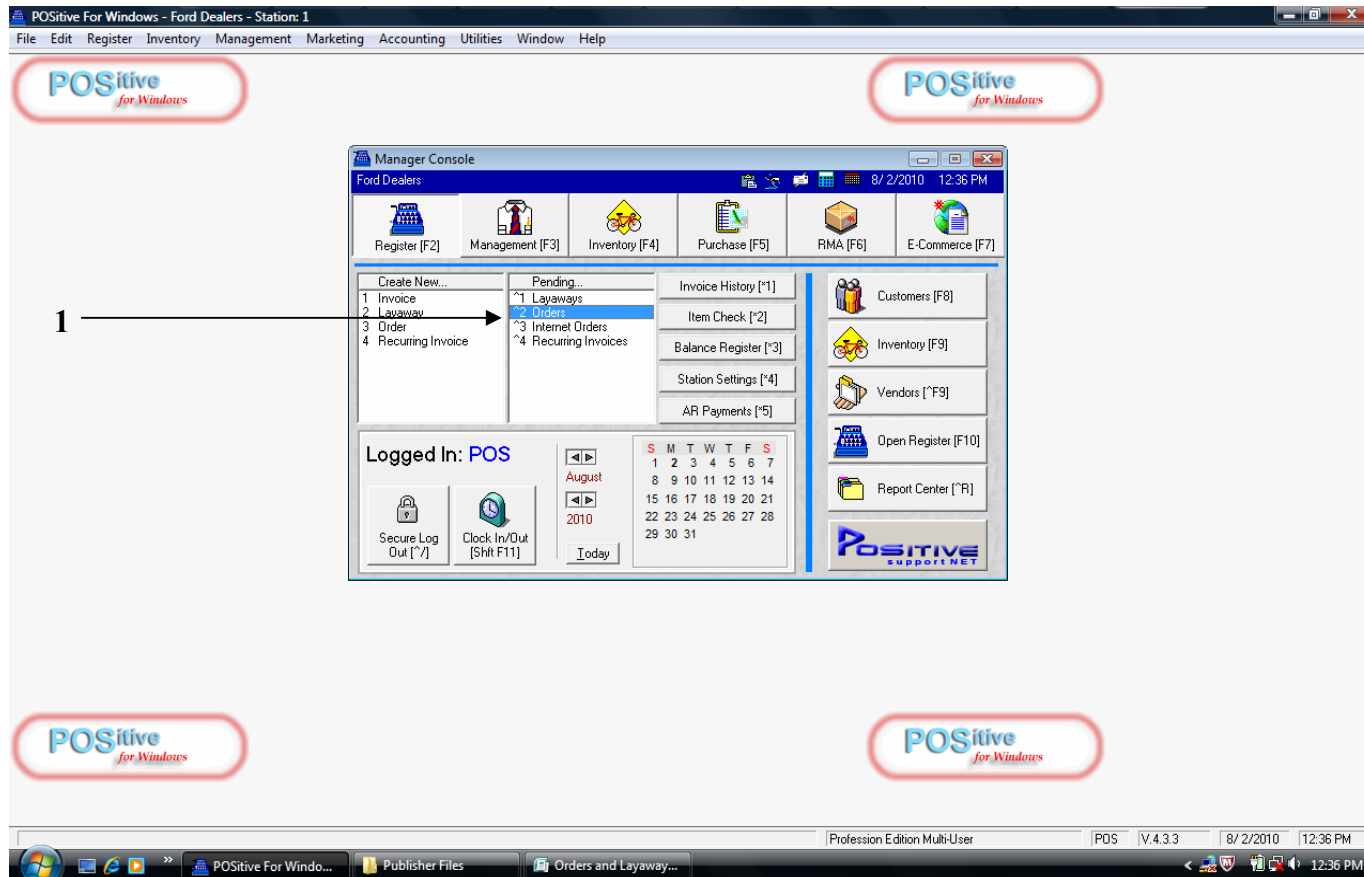
Line Totals:	42.00	SubTotal:	42.00
Taxable:	0.00	- Coupon:	0.00
Exempt:	0.00	- Deposit:	0.00
Item Count:	3.00	Total:	42.00

The bottom right of the screen displays a large green '42.00' and a 'Save [F10]' button.

When the Print option appears.

1. Click Yes to **Print 2 Receipts** - one for the customer and one for your records.

Orders and Layaways



To access any existing Orders or Layaways, go to the Register Center [F2]

1. Click **Orders** or **Layaways** from the **Pending column** (2nd column, 2nd item down) to view any orders in the system.

Converting an Order to a Sale

The screenshot shows the 'Orders In Process' window in the POSitive For Windows software. The window is divided into two main sections. The top section is a table of orders, and the bottom section shows the details of a selected order.

Orders In Process Table:

>Ref# [F2]	Name [F3]	Entered [F4]	Due [F5]	ID [F6]	Total w/Tax	Deposit	Balance
739	Student, Johnny	12/ 8/2009	12/15/2009	POS	15.30	15.30	0.00
742	Reising, Vickie	1/22/2010	2/25/2010	POS	27.00	15.00	12.00
743	Stadium, Football	6/ 1/2010	6/25/2010	POS	915.00	0.00	915.00
746	Student, Joe	8/ 1/2010	8/19/2010	POS	42.00	42.00	0.00
753	Student, Mary	8/ 2/2010	8/20/2010	POS	42.00	42.00	0.00

Order Details Table (for Ref# 753):

SKU	Description	Quantity	B'Order	Price	Disc. %	Total
CFJRM	CENTRAL FBALL JERSEY BLUE MEC	1	1	30.00	0.00	30.00
CNFB	CUSTOM NUMBER FRONT & BACK Customer Number 28	1	1	6.00	0.00	6.00
CNAME	CUSTOM NAME BACK Customer Name - Lewis	1	1	6.00	0.00	6.00

Callouts:

- 1: Points to the customer name 'Student, Mary' in the Orders In Process table.
- 2: Points to the 'Edit' button in the toolbar below the Orders In Process table.
- 3: Points to the 'Convert' button in the toolbar below the Order Details table.
- 5: Points to the 'Payment' button in the toolbar above the Orders In Process table.

In the Pending Screen, you see a list of current Orders or Layaways.

1. Click **The Customer Name** you want to convert or edit.
2. Chose Edit if you want to change the Order or Layaway
3. Details of their Order/Layaway appear in the bottom section.
4. Click the **Convert button** or the **(Alt V) keys** to start the conversion to a final sale.
5. **You also have the option of Partial Payments** (to Pay-Down the Order or Layaway).
 - This will print an Order/Layaway Balance Receipt

Converting an Order to a Sale

POSitive For Windows - Ford Dealers - Station: 1

File Edit Register Inventory Management Marketing Accounting Utilities Window Help

[ESC] Menu Invoice: 12349 By: POS Cashier: POS Date: 8/2/2010 Register: 1

SCAN: [Barcode]

Stock: 0 Held: 0 Available: 0

Description	Quantity	Price	Dsc. %	Total
CENTRAL FBALL JERSEY BLUE MED	1	30.00	0.00	30.00
CUSTOM NUMBER FRONT & BACK	1	6.00	0.00	6.00
Customer Number 28				
CUSTOM NAME BACK	1	6.00	0.00	6.00
Customer Name - Lewis				

Bill To | Ship To | Note |

Account: 50 Code: 50
May Student
Room 123
CLARKSTON, MI 48346
Home: 333-555-1212 Work: 248
Terms: NONE

Show More Options [F2] Select Bill To [F3] Edit Bill To [F4] Customer History [F5]

Adjust Quantity [F6] Balance Register [F7] Discount [F8] Void Transaction [F9]

Line Totals:	42.00	Sub Total:	42.00
Taxable:	0.00	- Coupon:	0.00
Exempt:	0.00	- Deposit:	42.00
Item Count:	3.00	Total:	0.00

Tender [F10]

Profession Edition Multi-User POS V.4.3.3 8/2/2010 1:19 PM

When you convert an Order or Layaway...the Invoice Screen will appear with the all your items

1. The Amount due will be Zero if 100% deposit payment was received when ordered.
2. Click **the Tender [F10]** to process the converted sale.

Converting an Order to a Sale

The screenshot shows the POS software interface for 'Ford Dealers - Station: 1'. The main window displays a list of items with columns for Description, Quantity, Price, Dsc.%, and Total. The items listed are:

Description	Quantity	Price	Dsc.%	Total
CENTRAL FBALL JERSEY BLUE MED	1	30.00	0.00	30.00
CUSTOM NUMBER FRONT & BACK	1	6.00	0.00	6.00
Customer Number 28				
CUSTOM NAME BACK	1	6.00	0.00	6.00
Customer Name - Lewis				

A dialog box titled 'Transaction finalized...' is overlaid on the screen. It contains the text 'Change Due:' followed by a digital display showing '0.00'. Below the display are three buttons: 'E-Mail [F5]', 'Reprint [F7]', and 'OK [F10]'. An arrow points to the 'OK [F10]' button with the number '1'.

At the bottom of the screen, there is a summary section with the following data:

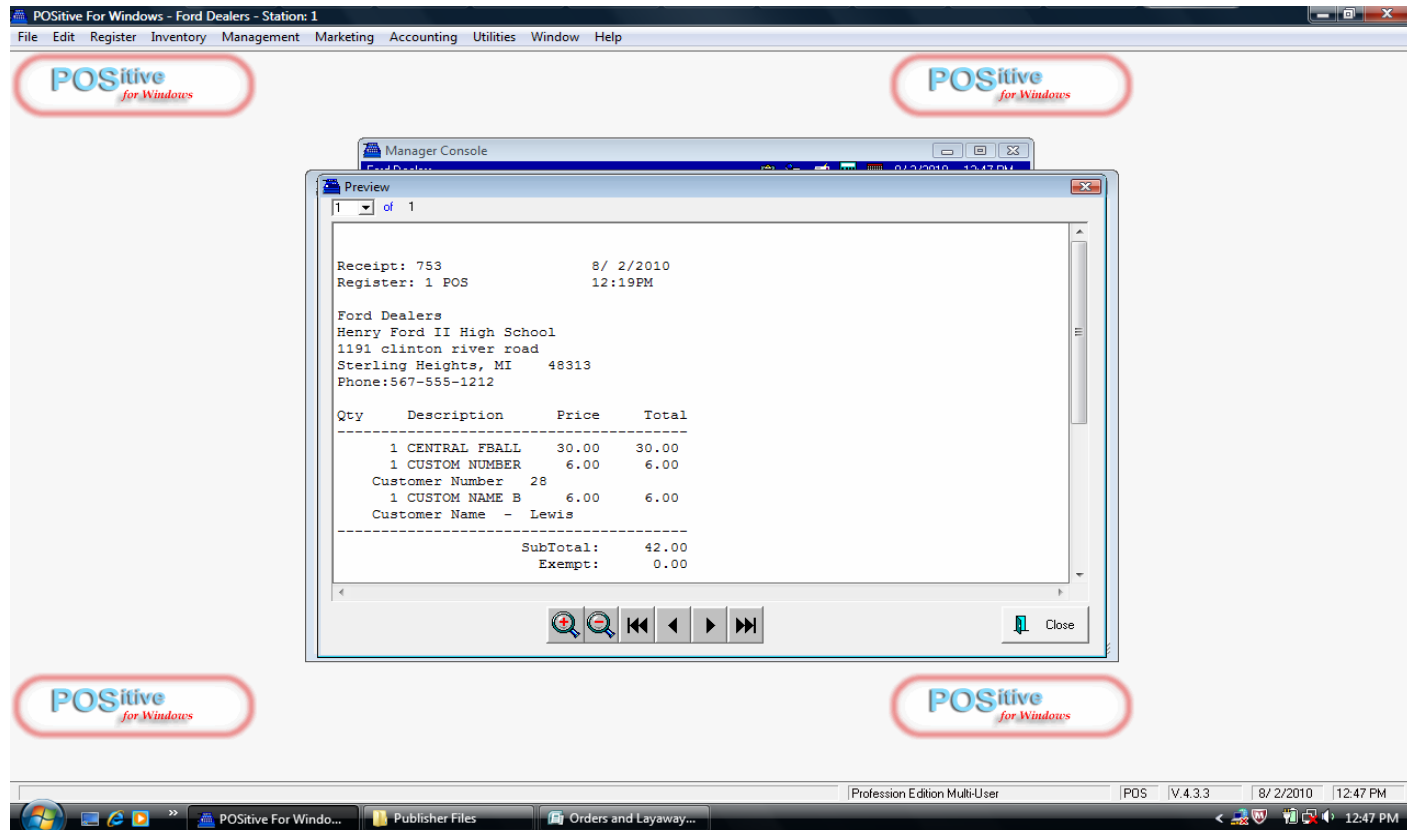
Line Totals:	42.00	Sub Total:	42.00
Taxable:	0.00	- Coupon:	0.00
Exempt:	0.00	- Deposit:	42.00
Item Count:	3.00	Total:	0.00

The bottom right corner of the interface shows a large digital display with '0.00' and a 'Tender [F10]' button.

The Change Due screen appears.

1. Click the **OK button [F10]** to print 2 copies of the converted final sale.

Converting an Order to a Sale



The Receipt Printer will print 1 Receipt & post the sale (remove stock count & credit Dept/Category)

The Sale is now processed and complete and the original Order or Layaway has been removed from the Pending list.

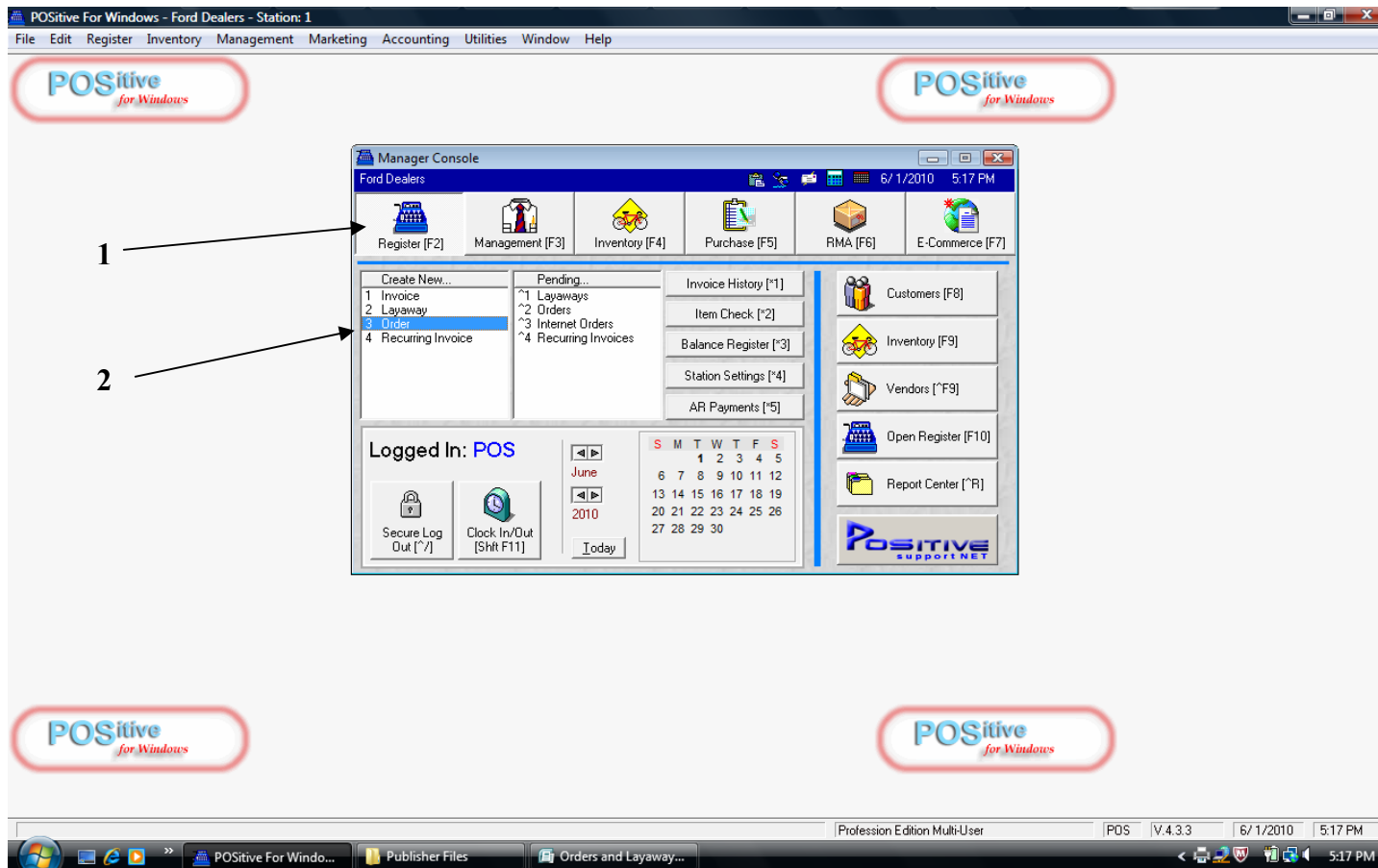
Satellite Orders

Orders Example 2 – Selling from a Satellite location.

Let's assume you want to take an assortment of merchandise out to your football stadium (or any other non-store venue) and sell to students, parents, and the community. [The Order/Layaway function will allow you to create a master list of items by description, SKU, and quantity available for sale.](#) You can conduct your sales at the satellite location, then return and inventory the unsold items, convert any items sold to actual sales from the pending order that will now be adjusted to reflect items sold.

[Sales for any Satellite venue will need to be assigned to a specific customer name, such as Football Stadium, Cafeteria Sales, or Basketball Arena.](#) The customer name should be added to your Customer List prior to creating your order. Various orders and sales for satellite venues can be tracked by date and the customer (venue) name.

Satellite Orders



To create an Order for a Satellite location, from the Manager Console Screen

1. Click the **Register Center [F2]**
2. Select the **Orders (or Layaway)** from the options in Column One [Current Items] - arrow down and click enter.

Satellite Orders

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The screenshot shows the POSitive For Windows interface. At the top, there's a menu bar with options like File, Edit, Register, Inventory, Management, Marketing, Accounting, Utilities, Window, and Help. Below the menu bar, there's a status bar showing "Order: 748 By: PDS Date: 8/ 2/2010 Register: 1". The main area is a table with columns: Description, Quantity, Price, Dsc.%, and Total. Below the table, there's a section for "Bill To | Ship To | Note" with a blue text box containing customer information: "Account: 50 Code: 50", "Mary Student", "Room 123", "CLARKSTON, MI 48346", "Home: 333 515-1212 Work: 248", and "Terms: NONE". To the right of this text box are several buttons: "Show More Options [F2]", "Select Bill To [F3]", "Edit Bill To [F4]", "Customer History [F5]", "Adjust Quantity [F6]", "Balance Register [F7]", "Discount [F8]", and "Void Transaction [F9]". At the bottom left, there's a summary table with "Line Totals", "Taxable", "Exempt", "Item Count", "Sub Total", "Coupon", "Deposit", and "Total", all showing 0.00. At the bottom right, there's a large green display showing "0.00" and a "Save [F10]" button. The Windows taskbar at the bottom shows the system tray with the date "8/ 2/2010" and time "11:08 AM".

1 →

Description	Quantity	Price	Dsc.%	Total
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Line Totals:	0.00	Sub Total:	0.00
Taxable:	0.00	- Coupon:	0.00
Exempt:	0.00	- Deposit:	0.00
Item Count:	0.00	Total:	0.00

0.00

On the Order or Layaway Screen (similar in appearance to the Invoice Screen)

1. The **Venue Name (Football, Open House)** appears in the **blue area** on the lower left.

Satellite Order Inventory

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1

2

Description	Quantity	Price	Dsc.%	Total
CENTRAL C BB HAT BLUE	12	12.00	0.00	144.00
FLEECE BEANIE NAVY	8	12.00	0.00	96.00
FLEECE MITTENS	12	10.00	0.00	120.00
KNIT MITTENS	6	10.00	0.00	60.00
CENTRAL LOGO HOODIE BLUE SMALL	3	29.00	0.00	87.00
CENTRAL LOGO HOODIE BLUE MED	4	29.00	0.00	116.00
CENTRAL LOGO HOODIE BLUE LARGE	4	29.00	0.00	116.00
CENTRAL LOGO HOODIE BLUE XLG	4	29.00	0.00	116.00
FOAM FINGERS YELLOW	12	5.00	0.00	60.00

Line Totals: 915.00 SubTotal: 915.00
Taxable: 0.00 - Coupon: 0.00
Exempt: 0.00 - Deposit: 0.00
Item Count: 65.00 Total: 915.00

915.00 Save [F10]

On the Order or Layaway Screen

1. Enter (scan) **Items that will be sold @ your Satellite Location.**
2. Be sure to adjust the **Quantity** for each item, [F6] you will take to the satellite location

Satellite Order Inventory

The screenshot shows a POS application window titled "POSitive For Windows - Ford Dealers - Station: 1". The interface includes a menu bar, a status bar with order details, a main table for the order, a summary section, and a bottom toolbar with various function buttons.

Description	Quantity	Price	Dsc. %	Total
BAGEL PLAIN	12	1.00	0.00	12.00
BAGEL CHEDDAR	18	1.25	0.00	22.50
BAGEL PIZZA	12	1.25	0.00	15.00
BAGEL CHEWY	6	1.25	0.00	7.50
CREAM CHEESE PACKET	48	0.25	0.00	12.00

Line Totals:	69.00	Sub Total:	69.00
Taxable:	0.00	- Coupon:	0.00
Exempt:	0.00	- Deposit:	0.00
Item Count:	96.00	Total:	69.00

The bottom right of the screen displays a large green "69.00" and a "Save [F10]" button. The Windows taskbar at the bottom shows the system tray with the date "8/7/2010" and time "5:03 PM".

Satellite Sales are common for all types of merchandise.

Shown above is an example of a Food Items Order/Layaway being taken to a Cafeteria venue location for sale.

Satellite Order Inventory

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POSitive For Windows - Ford Dealers - Station: 1

File Edit Register Inventory Management Marketing Accounting Utilities Window Help

[ESC] Menu Order: 743 By: POS Date: 6/1/2010 Register: 1

SCAN

Stock: 41 | Held: 12 | Available: 29

Description	Quantity	Price	Dsc.%	Total
CENTRAL C BB HAT BLUE	12	12.00	0.00	144.00
FLEECE BEANIE NAVY	8	12.00	0.00	96.00
FLEECE MITTENS	12	10.00	0.00	120.00
KNIT MITTENS	6	10.00	0.00	60.00
CENTRAL LOGO HOODIE BLUE SMALL	3	29.00	0.00	87.00
CENTRAL LOGO HOODIE BLUE MED	4	29.00	0.00	116.00
CENTRAL LOGO HOODIE BLUE LARGE	4	29.00	0.00	116.00
CENTRAL LOGO HOODIE BLUE XLG	4	29.00	0.00	116.00
FOAM FINGERS YELLOW	12	5.00	0.00	60.00

Bill To | Ship To | Note

Account: 48 Code: 48
Football Stadium
Sale Tent

Home: Work:
Terms: 30

Show More Options [F2] Select Bill To [F3] Edit Bill To [F4] Customer History [F5]

Adjust Quantity [F6] Balance Register [F7] Discount [F8] Void Transaction [F9]

Line Totals: 915.00 SubTotal: 915.00
Taxable: 0.00 - Coupon: 0.00
Exempt: 0.00 - Deposit: 0.00
Item Count: 65.00 Total: 915.00

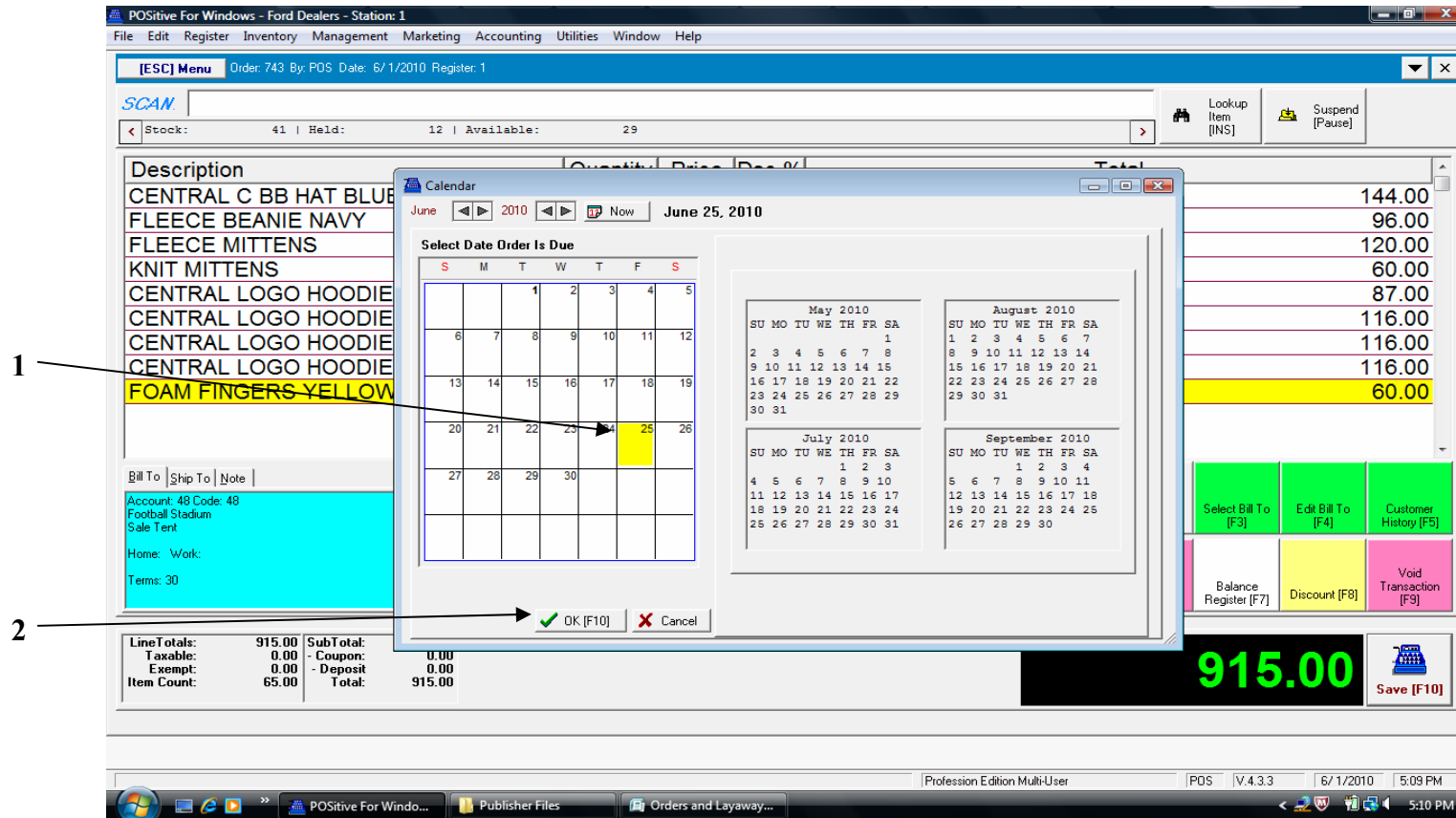
915.00 Save [F10]

Profession Edition Multi-User POS V.4.3.3 6/1/2010 5:05 PM

On the Orders or Layaway Screen

1. Once entire order has been entered, Click **Save [F10]**
(The Order will now be pending and available for sale at the Satellite venue)
2. The total **\$ value** (at retail) appears at the bottom (black total area).

Satellite Order Inventory



A Calendar Screen will appear

1. Select a **Date** in the future, the order will be processed by (**highlight in yellow**).
Choose the date on or just after your Satellite sales event.
2. Click **OK [F10]** to record the date.

Satellite Order Inventory

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The screenshot displays the POS software interface for 'Ford Dealers - Station: 1'. The main window shows an order inventory list with columns for Description, Quantity, Price, Dsc.%, and Total. A 'Positive Alert' dialog box is overlaid on the list, asking 'Apply Payment?' with 'Yes', 'No', and 'Cancel' buttons. The order list includes items like 'CENTRAL C BB HAT BLUE', 'FLEECE BEANIE NAVY', 'FLEECE MITTENS', 'KNIT MITTENS', 'CENTRAL LOGO HOODIE BLUE SMALL', 'CENTRAL LOGO HOODIE BLUE MED', 'CENTRAL LOGO HOODIE BLUE LARGE', 'CENTRAL LOGO HOODIE BLUE XLG', and 'FOAM FINGERS YELLOW'. The total amount is 915.00. The interface also shows a 'Bill To' section with account information, a 'Line Totals' section, and a 'Save [F10]' button.

Description	Quantity	Price	Dsc.%	Total
CENTRAL C BB HAT BLUE	12	12.00	0.00	144.00
FLEECE BEANIE NAVY	8	12.00	0.00	96.00
FLEECE MITTENS	12	10.00	0.00	120.00
KNIT MITTENS	6	10.00	0.00	60.00
CENTRAL LOGO HOODIE BLUE SMALL	3	29.00	0.00	87.00
CENTRAL LOGO HOODIE BLUE MED	4	29.00	0.00	116.00
CENTRAL LOGO HOODIE BLUE LARGE	4	29.00	0.00	116.00
CENTRAL LOGO HOODIE BLUE XLG	4	29.00	0.00	116.00
FOAM FINGERS YELLOW				60.00

Line Totals: 915.00 SubTotal: 915.00
Taxable: 0.00 - Coupon: 0.00
Exempt: 0.00 - Deposit: 0.00
Item Count: 65.00 Total: 915.00

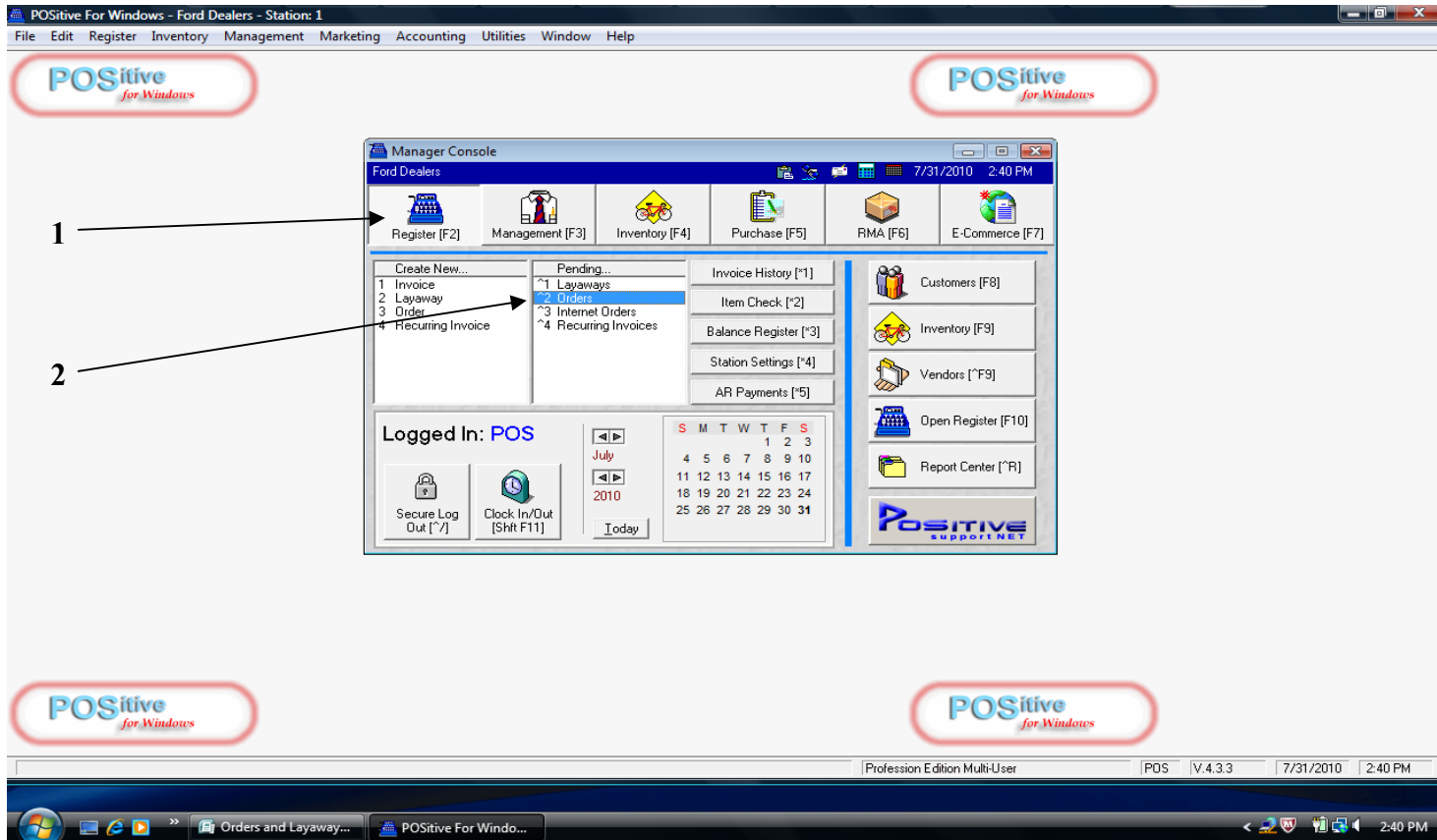
A Positive Alert will Appear asking to Apply a Payment. For Satellite Venue Sales, no payment is taken at the time of the order..

1. When Prompted **Enter NO.**

The Order is complete and will then go to the Orders Pending area..

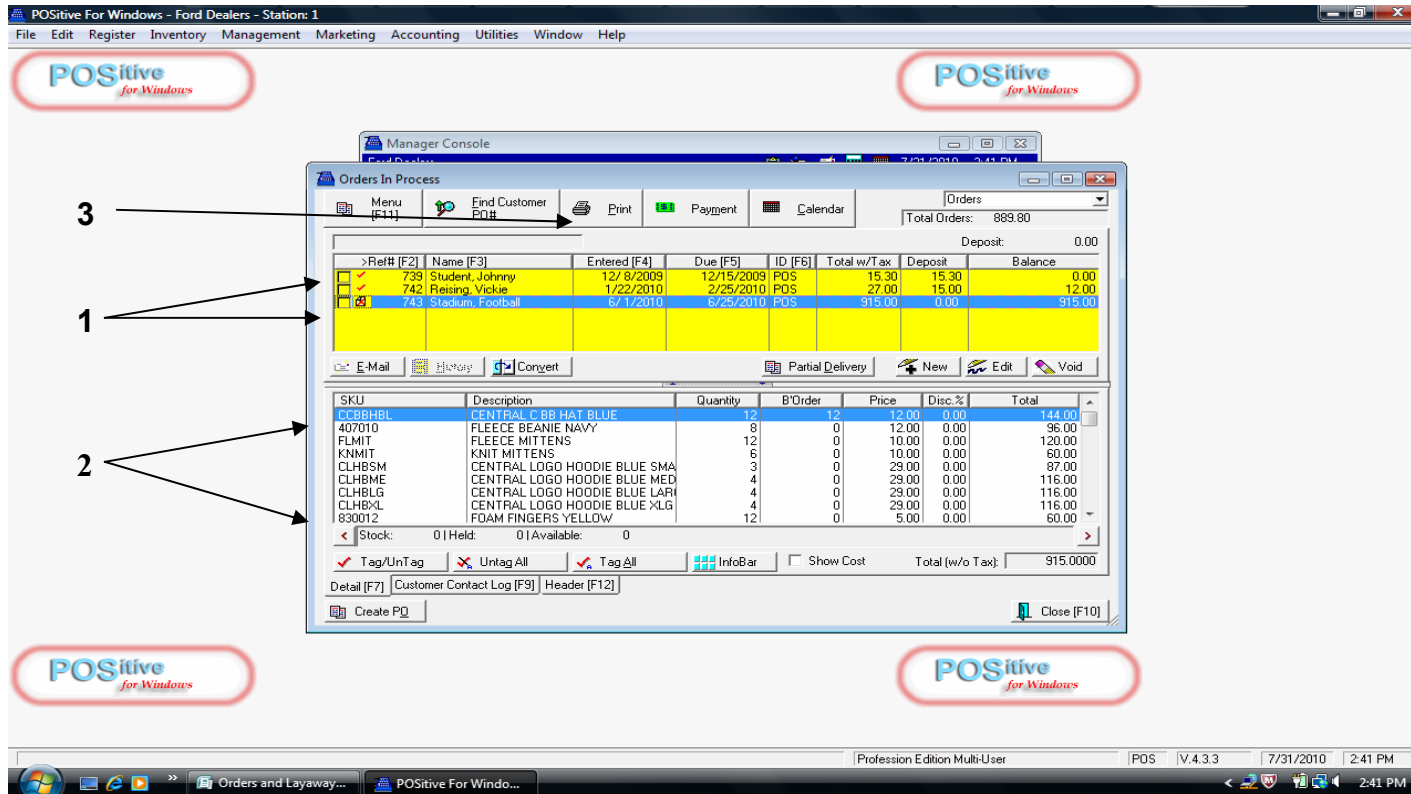
2. **Print 2 receipt copies (1 for event Manager & 1 for Teacher)**

Satellite Orders Pending



1. To view an Order or Layway that has been saved and is now pending, go to the **Inventory Center [F2]** from the Manager's Console.
2. Click on the **Orders Item** [^2 = Shift 2] (2nd line) in the Pending column (2nd column).

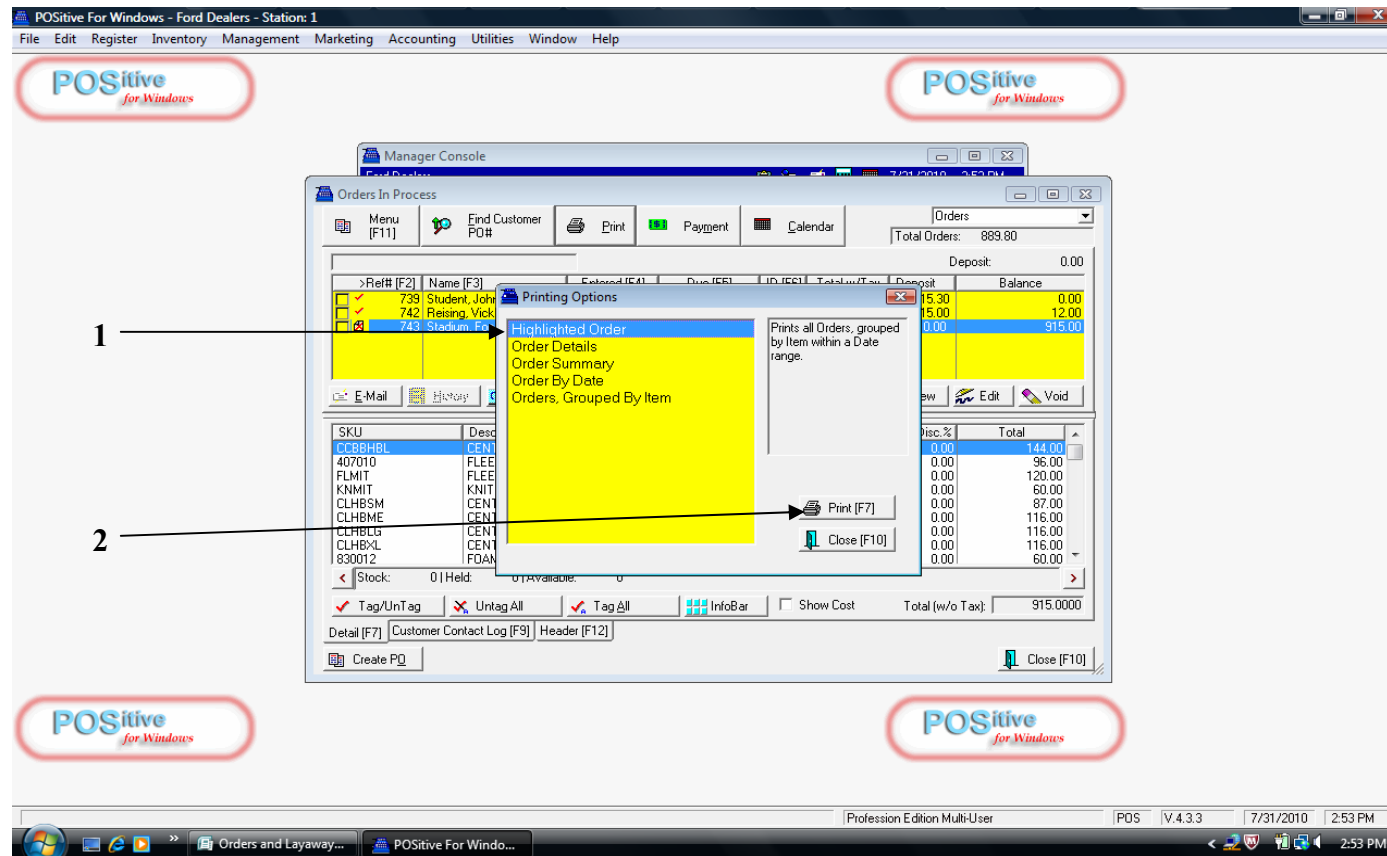
Satellite Orders Pending



The Pending Orders/Layway screen will now show all pending Orders/Layaways taken and saved.

1. Click on the Satellite Order from the Pending Venue Orders listed.
2. The Order Details will appear below the yellow area.
3. You can Edit, Print or Covert the Pending Order.

Satellite Orders Pending



To Print an Order or Layaway:

1. Click on the **Highlighted Order** from the list.
2. Click the **Print button (F 7)**

Pending Orders Printed

POSitive For Windows - Ford Dealers - Station: 1

File Edit Register Inventory Management Marketing Accounting Utilities Window Help

POSitive for Windows

Manager Console

Preview

1 of 1

Receipt: 743 6/ 1/2010
 Register: 1 POS 4:55PM

Ford Dealers
 Henry Ford II High School
 1191 clinton river road
 Sterling Heights, MI 48313
 Phone:567-555-1212

Qty	Description	Price	Total
12	CENTRAL C BB	12.00	144.00
8	FLEECE BEANIE	12.00	96.00
12	FLEECE MITTEN	10.00	120.00
6	KNIT MITTENS	10.00	60.00
3	CENTRAL LOGO	29.00	87.00
4	CENTRAL LOGO	29.00	116.00
4	CENTRAL LOGO	29.00	116.00
4	CENTRAL LOGO	29.00	116.00

Close

POSitive for Windows

POSitive for Windows

Profession Edition Multi-User POS V.4.3.3 7/31/2010 2:54 PM

Orders and Layaway... POSitive For Windo...

2:54 PM

It's a good practice to have a copy of any Satellite Pending Order available for reference.

1. The **Pending Order Report** will have a list of all items with the retail price and quantity available for sale.

You can Print a copy of the Pending Order

2. Click the **Print button** (**P** = Alt P)

Converting an Order to Sales

The screenshot shows the 'Orders In Process' window in the POSITIVE For Windows software. The window title is 'Orders In Process' and it contains a menu bar with options like 'Menu [F11]', 'Find Customer PG#', 'Print', 'Payment', and 'Calendar'. Below the menu bar is a table of orders with columns: '>Ref# [F2]', 'Name [F3]', 'Entered [F4]', 'Due [F5]', 'ID [F6]', 'Total w/Tax', 'Deposit', and 'Balance'. The order for '743 Stadium Football' is selected. Below the table is a 'Convert' button. A second table below shows the order details with columns: 'SKU', 'Description', 'Quantity', 'B'Order', 'Price', 'Disc.%', and 'Total'. The 'Convert' button is also highlighted in the bottom right corner of the window.

>Ref# [F2]	Name [F3]	Entered [F4]	Due [F5]	ID [F6]	Total w/Tax	Deposit	Balance
739	Student, Johnny	12/18/2009	12/18/2009	POS	15.30	15.30	0.00
742	Reising, Vickie	1/22/2010	2/25/2010	POS	27.00	15.00	12.00
743	Stadium, Football	6/1/2010	6/25/2010	POS	915.00	0.00	915.00

SKU	Description	Quantity	B'Order	Price	Disc.%	Total
CB8BHBL	CENTRAL C.BB HAT BLUE	12	12	12.00	0.00	144.00
407010	FLEECE BEANIE NAVY	8	0	12.00	0.00	96.00
FLMIT	FLEECE MITTENS	12	0	10.00	0.00	120.00
KNMIT	KNIT MITTENS	6	0	10.00	0.00	60.00
CLHBSM	CENTRAL LOGO HOODIE BLUE SMA	3	0	29.00	0.00	87.00
CLHBME	CENTRAL LOGO HOODIE BLUE MED	4	0	29.00	0.00	116.00
CLHBLG	CENTRAL LOGO HOODIE BLUE LARG	4	0	29.00	0.00	116.00
CLHBXL	CENTRAL LOGO HOODIE BLUE XLG	4	0	29.00	0.00	116.00
830012	FOAM FINGERS YELLOW	12	0	5.00	0.00	60.00

After an event has occurred and inventory & \$\$ has come back to the School-Store:

1. Go to Pending Orders or Layaways List....
2. The Customer Name remains highlighted.
3. Note, details of the Order/Layaway appear in the bottom section.
4. Click the Convert button or the (Alt V) keys to start the conversion to a final sale.

Converting an Order to Sales

32

The screenshot shows the POS software interface for 'Positive For Windows - Ford Dealers - Station: 1'. The main window displays an invoice for 'Invoice: 12351 By: POS Cashier: POS Date: 6/ 1/2010 Register: 1'. The invoice items are listed in a table with columns for Description, Quantity, Price, Dsc.%, and Total. The total amount due is 915.00. A yellow highlight is on the first row, and a red arrow points to the 'Quantity' column. A red arrow points to the 'Total' field.

Description	Quantity	Price	Dsc.%	Total
CENTRAL C BB HAT BLUE	12	12.00	0.00	144.00
FLEECE BEANIE NAVY	8	12.00	0.00	96.00
FLEECE MITTENS	12	10.00	0.00	120.00
KNIT MITTENS	6	10.00	0.00	60.00
CENTRAL LOGO HOODIE BLUE SMALL	3	29.00	0.00	87.00
CENTRAL LOGO HOODIE BLUE MED	4	29.00	0.00	116.00
CENTRAL LOGO HOODIE BLUE LARGE	4	29.00	0.00	116.00
CENTRAL LOGO HOODIE BLUE XLG	4	29.00	0.00	116.00
FOAM FINGERS YELLOW	12	5.00	0.00	60.00

Bill To | Ship To | Note |

Account: 48 Code: 48
Football Stadium
Sale Tent

Home: Work:
Terms: 30

Show More Options [F2] | Select Bill To [F3] | Edit Bill To [F4] | Customer History [F5]

Adjust Quantity [F6] | Balance Register [F7] | Discount [F8] | Void Transaction [F9]

Line Totals: 915.00 | SubTotal: 915.00
Taxable: 0.00 | Coupon: 0.00
Exempt: 0.00 | Deposit: 0.00
Item Count: 65.00 | Total: 915.00

915.00
Tender [F10]

The Invoice Screen now appears with the sale items shown converted from the pending order.

1. The items listed will show all **original quantities** from the pending order.
2. The **Amount due** will be for the entire order.

Converting an Order to Sales

The screenshot shows the POS software interface for 'Ford Dealers - Station: 1'. The main window displays an invoice with the following items:

Description	Quantity	Price	Dsc. %	Total
CENTRAL C BB HAT BLUE	5	12.00	0.00	60.00
FLEECE BEANIE NAVY	3	12.00	0.00	36.00
FLEECE MITTENS	7	10.00	0.00	70.00
KNIT MITTENS	3	10.00	0.00	30.00
CENTRAL LOGO HOODIE BLUE SMALL	3	29.00	0.00	87.00
CENTRAL LOGO HOODIE BLUE MED	4	29.00	0.00	116.00
CENTRAL LOGO HOODIE BLUE LARGE	4	29.00	0.00	116.00
CENTRAL LOGO HOODIE BLUE XLG	4	29.00	0.00	116.00
FOAM FINGERS YELLOW	1	60.00	0.00	60.00

The 'Adjust Quantity' dialog box is open for 'CENTRAL LOGO HOODIE BLUE SMALL', showing a quantity of 3 and an 'OK [F10]' button. A red '1' points to the 'Adjust Quantity [F6]' button in the bottom right of the main window, and a red '2' points to the 'OK [F10]' button in the dialog box.

At the bottom of the main window, the 'Tender [F10]' button displays a total of 691.00. The bottom status bar shows 'Profession Edition Multi-User | POS | V.4.3.3 | 8/8/2010 | 1:22 AM'.

The Invoice needs to be adjusted to show the quantity of items actually sold during the satellite sales event.

1. For each line, **adjust the quantity [F6]** to reflect the recorded sale amount.

2. Click **OK [F10]** to complete the quantity adjustment.

The remaining unsold items will be automatically returned to stock—no adjustment will be needed.

Converting an Order to Sales

The screenshot shows the POS software interface for 'Ford Dealers - Station: 1'. The main window displays an invoice for 'Invoice: 12351 By: POS Cashier: POS Date: 6/1/2010 Register: 1'. The invoice items are listed in a table with columns for Description, Quantity, Price, Dsc.%, and Total. The total amount due is 395.00. A red arrow points from the total amount to the 'Tender [F10]' button. A blue arrow points from the 'Bill To' field to the 'Tender [F10]' button.

Description	Quantity	Price	Dsc.%	Total
CENTRAL C BB HAT BLUE	5	12.00	0.00	60.00
FLEECE BEANIE NAVY	3	12.00	0.00	36.00
FLEECE MITTENS	7	10.00	0.00	70.00
KNIT MITTENS	3	10.00	0.00	30.00
CENTRAL LOGO HOODIE BLUE SMALL	1	29.00	0.00	29.00
CENTRAL LOGO HOODIE BLUE MED	2	29.00	0.00	58.00
CENTRAL LOGO HOODIE BLUE LARGE	2	29.00	0.00	58.00
CENTRAL LOGO HOODIE BLUE XLG	1	29.00	0.00	29.00
FOAM FINGERS YELLOW	5	5.00	0.00	25.00

Bill To: [Bill To] | Ship To: [Ship To] | Note: [Note]

Account: 48 Code: 48
Football Stadium
Sale Tent
Home: Work:
Terms: 30

Line Totals: 395.00 SubTotal: 395.00
Taxable: 0.00 Coupon: 0.00
Exempt: 0.00 Deposit: 0.00
Item Count: 29.00 Total: 395.00

395.00
Tender [F10]

The Invoice Screen will now reflect only the sale items from the Satellite Sale..

1. The **Amount due** should match the \$ payments received when sold at the Satellite
2. Click the **Tender [F10]** to process the **FINAL** sale of the event.

Converting an Order to Sales

The screenshot shows the POSitive For Windows interface. The main window displays an invoice with a list of items and their prices. A 'Tender' dialog box is open, allowing the user to enter the amount for each tender type. The 'Balance Due' is 286.00, and the 'Total Due' is 395.00. The 'Tender' button is highlighted in red.

Annotations in the image:

- 1: Points to the 'Tender' dialog box.
- 2: Points to the 'Amount' field for each tender type.
- 3: Points to the 'OK [F10]' button.

Description	Quantity	Price	Dsc %	Total
CENTRAL C BB HAT BLUE				60.00
FLEECE BEANIE NAVY				36.00
FLEECE MITTENS				70.00
KNIT MITTENS				30.00
CENTRAL LOGO HOODIE BLUE SM				29.00
CENTRAL LOGO HOODIE BLUE ME				58.00
CENTRAL LOGO HOODIE BLUE LAR				58.00
CENTRAL LOGO HOODIE BLUE XLC				29.00
FOAM FINGERS YELLOW				25.00

Tender Type	Amount
Cash	286.00
Check	58.00
Store Account	0.00
Visa	22.00
Master Card	29.00
Debit Card	0.00
Internal Transfer	0.00

Line Totals:	395.00	Sub Total:	395.00
Taxable:	0.00	- Coupon:	0.00
Exempt:	0.00	- Deposit:	0.00
Item Count:	29.00	Total:	395.00

Total Due: 395.00

Tender [F10]

When the Tender Screen appears, apply the appropriate tender types and amounts collected

1. Click on each **Tender Type (blue)**. Enter the **\$ amount**.
2. Arrow down or up to the next tender type and enter each tender amount.
3. Click **OK [f10]** when the balance due is \$0 to accept the tender.

Converting an Order to Sales

Transaction finalized...

Change Due: 0.00

1

2

Description	Quantity	Price	Dsc.%	Total
CENTRAL C BB HAT BLUE	5	12.00	0.00	60.00
FLEECE BEANIE NAVY	3	12.00	0.00	36.00
FLEECE MITTENS	7	10.00	0.00	70.00
KNIT MITTENS	3	10.00	0.00	30.00
CENTRAL LOGO HOODIE BLUE SMALL				29.00
CENTRAL LOGO HOODIE BLUE MED				58.00
CENTRAL LOGO HOODIE BLUE LARGE				58.00
CENTRAL LOGO HOODIE BLUE XLG				29.00
FOAM FINGERS YELLOW				25.00

Line Totals: 395.00 SubTotal: 395.00
 Taxable: 0.00 - Coupon: 0.00
 Exempt: 0.00 - Deposit: 0.00
 Item Count: 29.00 Total: 395.00

395.00 Tender [F10]

When the cash drawer opens and the change due appears.

1. Print a receipt **[F7]** for your records to record the Satellite Sale..
2. Click **OK [F10]** to proceed to the next sale.

Satellite Orders

The Satellite Sale has now been completed. You have successfully tracked all sales from the Satellite Venue and have adjusted all quantities to reflect the sales of those individual items. All remaining items are put back in stock and remain available for sale with the proper quantities.

Your method of conducting the sales at your venue is up to you. Some schools will just use a cash box and paper hand written receipts. Some will use a laptop computer with a copy of the real program available to track sales on a different station number. Some will also use a hand held bar-code scanner with a USB port connection with the laptop. Items can then be sold by scanning the bar code tag attached just as in your regular store location, creating greater accuracy.

If a school network is available, some schools can even go online as an additional station and just link into your store's network and avoid the use of the order function all together, and just conduct regular sales at that station. Any way you configure the system, Satellite Sales can be a great option to open up a new market and increase sales.

