

IN KEYBOARD SALES MODE:

To view Purchasing & Receiving, you must go to Manager Mode.

- 1. Select Show More Options Button (F2)
- 2. Select Manager Mode Button(F9)

(NOTE: Only Teachers & Managers will have access to Manager Mode)

SKU	Description Quantity	n Price Disc.	Total		Foods Misc	Coffee Small	Coffee Large	Beverages Misc	Custome List
					Breeze Freeze Small	Breeze Freeze Large	Cinnamon Bun	Extra Cream Cheese	Suspen
						Complete State			Retrieve
					Touch	Bagel	Toast Bagel	Raisin Bage	Invoice Prompt
					1 Cookie	2 Cookies	Choc. Chip Muffin	Blueberry Muffin	Coupor
					1 Arnold Palmer	2-Arnold Palmers	Mini Melts Small	Mini Melts Medium	Delete Ite
					Snapple Apple	Pink Lemondade	Kiwi Strawberry	Mini Melts Large	
Quick Sale					Adjust Quantity	2	3 GO More	Manager	Tender
LineTotals: Taxable: SalesTax: Item Count:	0.00 SubTotal: 0.00 - Coupon: 0.00 - Deposit 0.00 Total:	0.00 0.00 0.00	•	$\widehat{\mathbf{v}}$				0	00

IN TOUCH SCREEN SALES MODE:

To view Purchasing & Receiving, you must go to Manager Mode.

1. Touch Manager Button

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SKU	Description		[A]				
	Quantity F	rice Disc.	l otal 🔤	Exit Program	Logo	ut	Go to Sales
				Balance Reg.	Daily Sales Summary	Gift Certificates	Edit Bill To
				Invoice History	Make AR Payment	Wote	ÇÇ Edit Notes
				Open Cash Drawer	Report Center	Price Check	Return From Invoice
				Discount	Time Clock	Show Costs	Void
Quick Sale					Manager	Mode	-
LineTotals: Taxable: SalesTax:	0.00 SubTotal: 0.00 - Coupon: 0.00 - Deposit	0.00 0.00 0.00	٠				0 00

ON MANAGER BUTTON SCREEN:

1. Select Manager Mode Button

(NOTE: Only Teachers & Managers will have access to Manager Mode)

Touch



IN MANAGER MODE: Go to Vendor Center, to print a Vendor Re-Order Report To view Purchasing & Receiving, go to VENDORS

1. Select Vendor Button

PO File	OSitive Retail Manager - The B	luetique - Station: 1					
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1	Vendor Center View (*) General	Locate:	gol 🥊	P G	Account	L.	
	Details Contacts Shipping Addresses Purchase Orders Items On PO Vendor Payments	Cosco Cosco Jansport Apparel Vendor No Vendor No Vendor Otis Cookies	COSCO JAV NV NOR OC				
2	Notes Documents Actions © Vendor Inventory	Vendor Information		E-Mail Address:)elete
5	PU History Payables Print List Print Selected Vendor Terms	Fax E-Mait		Call Vendor [F8]			
Vendors						Internal ID: 1	

VENDOR CENTER:

Choose the VENDOR that you need to order from:

1. Highlight the VENDOR on your list

2. Click Vendor Inventory button



VENDOR CENTER: You will view all the items that this Vendor sells you.

- 1. View details of each item below
- 2. Click Print List link to view vendor's inventory and print a Vendor Re-Order Report (i.e. Shopping List)



VENDOR CENTER: To Print a VENDOR RE-ORDER REPORT....

1. Click Select For a Shopping List



VENDOR CENTER: To Print a VENDOR RE-ORDER REPORT....

1. Click NO to inactive inventory

(NOTE: Click Yes if you want the report to include discontinued items)

tomer Quick Return Jale Sale	► Exit Manager Mode Sales	Create Pending Calendar Pending Calendar Pending Calendar Pending Calendar	ry OCIOck In/Out rster Logout Essentials	
Vendor Inventory List				
View 🛞	Locate:	? 🖕 🗾 Hide Matrix Children (Headers Only)		e
Details	Jansport Apparel Vendor	N = Needs to be re-ordered P = Purcha	se Orders in process R = RMAs in process	
Current Stock Current POs PO History RMAs	N P R Vendor SKU SKU 05JHBXL Stress 05JHGL Saved Queries 10GSBXXL 10GSBXXL 10GSBXXL	Description XL JANSPORT HOODIES BLUE /XLARGE EN/LARGE EN/LARGE NCARGE	Cost Last Recvd 10.00 10.00 14.00	
Actions (8) Print List Print Labels Edit Item	123456 78545 Type: Item	Copy KL Modify Bename Delete Image: Comparison of the second secon	14.00 10.00	ie
To Urder List Verify/Adjust Stock InfoBar	In Stock Held Available	Letter Letter	20.00	
	Jansport Apparel Vendor	Ciose		

VENDOR CENTER:

You can print a VENDOR RE-ORDER REPORT 2 ways.....

- 1. Select a query "Less than 2" if you wish to only see a short shopping list of items that have 1 or 0 in stock.
- 2. Select Close to print all the inventory the vendor sells (NOTE: Inventory items can be shared by two or more vendors)
- 3. Or create a new query

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✓ 1 10,438						
		SHOPPING	LIST			
	Date: 1/27/2011 4:48	PM Confidenti	91	J	ansport Appare	l Vendor
	Item SKU	Item Description	Price1	Cost	Total Stock	Last Received
	05JHGL	JANSPORT HOODIE GREEN/LAR	20.00	10.00	1.0000	11
	10GSBXXL	GYM SHORTS BLUE/XXL	25.00	14.00	0.0000	11
	10GSNXXL	GYM SHORTS NAVY/XXL	19.50	14.00	0.0000	11
	JAN-200068-M	JANSPORT HOODIE M123-M-Whit	14.99	10.00	1.0000	1/03/2011
	JAN-200073-M	JANSPORT HOODIE M123-XL-Red	14.99	10.00	0.0000	11
	JAN-200075-W	JANSPORT HOODIE MIT23-XXL-BIL	14.99	10.00	0.0000	11

VENDOR CENTER: By Printing or VIEWING a VENDOR RE-ORDER REPORT....

- Review items that need ordering (Total Stock)
- Review items that have not been ordered in awhile and should be liquidated. (See Last Received)
- Due to price changes, review costs with Vendor. You may have to adjust retail \$\$.



After you have your shopping list.... IN MANAGER MODE: Go to Purchasing & Receiving Center, to Record Physical Inventory arriving at your store.

To view Purchasing & Receiving, go to PURCHASING & RECEIVING



You can place a PO 2 ways:

- 1. Place a PURCHASE ORDER ahead of the delivery (pro-active)
 - This involves several steps and would allow you to fax or email a PO to the VENDOR.
- 2. Receive Driver by creating a PO on the fly (reactive)
 - Most school stores choose this option, because it's faster and more convenient.
 - Click Receive w/o PO

Edit Window Help		
Customer Quick Return	Image: Transactions Purchasing Accounting E-Commerce Management Maintenance Image: Sales Image: Create Pending Image: Create Image: Cre	
Purchase Order Center		٦
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POs to Place	Total Entered By	-
PUS to Receive	Vendor ID: 50000 Teacher Adm	in
Antine	D 10.0000 Teacher-Adm	in
Actions		
Receive w/o PO		
E-Mail PO		
Export PO		
Print PD	PD Number Date Placed: 1/27/2011	
InfoBar		
Vendors Send Tell shall int		l
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	Terms: 0.00 Total	
Show 🗵	Confirmation #: Freight CDD:0.00	6.0
Details	Tax On Order: 0.00	
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	V OK (F10) X Cancel	
	Note:	

PURCHASING & RECEIVING CENTER: Receive Without PO

- The title is misleading, because we will create a Purchase Order & Receive the items at the same time.
- 1. Select a VENDOR by clicking browse button (F5)

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Somer Quick Ret Sale	Image: Sales I
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View	Close
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Actions Receive w/o PO E-Mail PO Export PO Print PO InfoBar Vendors Send To Label List	Vendor Code Vendor Name Phone CC Coke Cola 1-877-271-3730 COSCD Cosco JAV Jansport Apparel Vendor NV No Vendor NDR Northside Foods
Show @	Add B Edit More Detail

PURCHASING & RECEIVING CENTER: Browse your Vendor List and Highlight the desired VENDOR

1. Click Select

Purchasing & Receiving

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Show Image: Show <	2 POs to Place POs to Place POs to Receive Receive w/o PO E-MahRO Export PO Print PO InfoBar Vendors Send To Label List	Receive Without PO Is.00 Vendor ID: Vendor ID: Áccount: Account: PO Number: 13 Invoice Number: 123456 Shipping ID: TRUCK	Total Count: 2 otal Entered By 6.0000 Teacher-Admin 10.0000 Teacher-Admin
	Show (2) Details Documents	Terms: 30-DAYS Freight Invoiced: 10.00 Confirmation #: Freight CDD: 0.00 6.00 Tax On Drder: 0.00 7.00 6.00 Jansport Apparel Vendor 0.01 (F10) Cancel	Total 6.00

PURCHASING & RECEIVING CENTER: Once you have selected a Vendor

- 1. A sequential PO# will appear. You can type in your own PO# if you wish.
- 2. Enter the Invoice #

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- 3. Option—-> If there is a Freight Fee (\$10.00), you can add it here.
- 4. Ignore all other fields. Click OK (F10).



PURCHASING & RECEIVING CENTER: You are now ready to create & receive a Purchase Order (PO)

- 1. You can Scan a SKU (UPC Barcode) of Inventory Item (or package-box that it is delivered in)
- 2. If you don't have a scanner handy, click Add button (Keyboard shortcut = Insert button)

Image: Customer Sale Image: Customer Sale <th< th=""><th>Image: Customer Vendor Customer Actions Purchasing Accounting E-Commerce Management Management</th></th<>	Image: Customer Vendor Customer Actions Purchasing Accounting E-Commerce Management
Properties SKU: Add/Lookup [INS] PO#: 13 Save/Post PO [F10] Vendor Jansport Apparel Vendor Image: Save/Post PO [F10] Jansport Apparel Vendor Image: Save/Post PO [F10] PO History Your SKU Description Quantity Recvd Units Weight Cost Total Note PO Details Image: Serial #s Your SKU: DSJHGL Description: JANSPORT HOODIE GREEN/LARGE Vendor SKU: DSJHGL Vendor SKU: Vendor SKU: DSJHGL Vendor SKU: Ven	Properties SKU: Add/Lookup [INS] P0 ft: 13 Save/Post PD [F1] Vendor Details Jansport Apparel Vendor Image: Save/Post PD [F1] P0 History Your SKU Description Quantity Recvd Units Weight Cost Total Note Serial fts Your SKU: 05JHGL Description: JANSPORT HODDIE GREEN/LARGE Image: Save/Post PD [F1] Note Your SKU: 05JHGL Description: JANSPORT HODDIE GREEN/LARGE Image: Save/Post PD [F1] Note Your SKU: 05JHGL Description: JANSPORT HODDIE GREEN/LARGE Image: Save/Post PD [F1] Import Prink Vendor SKU: 05JHGL Units: 1.00 @ / EA/H Cost Total Weight InfoBar Hint Labels Hunts: 1.00 @ / EA/H Change Units [F5] 0.0000 @ 0.00000 @ 0.00000 @ 0.0000 @ 0.0000 @ 0.0000 @ 0.0000 @ 0
Note P0 Details Serial #s Your SKU: 05JHGL Actions Description: JANSPORT HOODIE GREEN/LARGE Import Vendor SKU: 05JHGL	Note P0 Details Serial #s Your SKU: 05JHGL Actions Poscription: JANSPORT HOODIE GREEN/LARGE Receive All [F9] Description: JANSPORT HOODIE GREEN/LARGE Import Print Void 05JHGL Units: Quantity To Order Print Labels 100 0 40.0000 0 0.0000 0 Item Detail 1.00 1 / EACH Sort P0 Edit Delete
	Void Quantity To Order Quantity Received Cost Total Weight InfoBar 4.00 \$ 4.00 \$ 0.0000 \$ 0.0000 \$ Image: Cost Imag

PURCHASING & RECEIVING CENTER:

Once you have inserted a SKU, a PO (Item) Details Prompt Screen appears....

1. Insert the QTY to ORDER you are receiving (either in Each or in Case Packages), hit ENTER on keyboard.

- 2. The QTY Received field will show the same QTY, hit ENTER on keyboard.
- 3. The COST field will show current Cost (Each or Case). You may change it to match Vendor's Invoice \$.
- 4. Click OK (F10) to save line item. Repeat for all items delivered.

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PURCHASING & RECEIVING CENTER:

Once you have finished your Receiving process:

- 1. The Grand Total should equal the Total \$ of the Vendor's Invoice & Freight Fee.
- 2. Click Save/Post PO button (F10)

Purchasing

& Receiving



PURCHASING & RECEIVING CENTER:

Once you clicked Save/Post button (F10), a prompt alert screen will appear:

- 1. Click Receive Now.
- 2. Only Click Save if you are not finished receiving order.
 - This will give you the opportunity to finish the PO later (see: Purchase Center #3 Receive PO's)

Purchasing

& Receiving

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PO Receive Summary									
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Summary Price/Cost Review	Stock Activity	Description		Perult					
Items Arrived Landed Cost Location Manager	05JHGL	JANSPORT HOODI	E GREEN/LARGE	Received To	Stock: 4.00				
Actions									
Print Labels	Cost Changes								2
Print Price Changes	SKU	Description		Last Cost		N	New Cost		
	05JHGL	JANSPORT HOODIE	GREEN/LARGE	10	0.0000			11.0000	
							ſ	Set Price	
	Orders Arrived						L.		
	SKU	Description	Customer		Transaction	Ordered	BackOrdrd	Arrived	

PURCHASING & RECEIVING CENTER:

A PO Receive Summary screen will appear:

- Here you will have the opportunity to Print Labels,
- Review Price Changes & Print them for Receiving Clerk
- Review how Vendor Freight Fees effected the final costs (Landed Cost) of items
- 1. Click Complete to Complete.

Purchasing & Receiving



IN MANAGER MODE:

To see the results of your purchasing history, go to Inventory Center..... To view Inventory Center, go to INVENTORY.

1. Select Inventory Button



INVENTORY CENTER:

- 1. Highlight the Item Received.
- 2. Under View Action Bar, Click Stock Manager
- 3. Under Current Stock tab,, view PO History or to reprint
- 4. Click view PO to see PO details



REPORT CENTER: For any Purchasing Report, Go to the Report Center

- 1. Click on Purchasing Reports, Under Report Type.
- 2. You will have access to multiple reports.