Introduction to POS, Dept/Categories, Vendors & Inventory Items
Training Outline (Don's Notes)
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Turn Computer on and view desktop menu.

If the software has not been loaded onto your computer, please refer to the Set-up Procedures for the Software and Access to the Program Outline.

Open the POS INFO Folder and review its content.

- Manual File
- Help File (also can be accessed to explain the current topic you are working with the F1 key)
- Sources for advanced students to use in creating a store operations manual
- Advanced lessons – examples are gift cards, inventory control, and bar code labels
- POS support contacts
    - POSitive's phone #'s
    - POS Systems Group #'s
- The Adobe Reader program is preloaded on our hardware, but may be required if using preexisting computer equipment.

The software should be registered with POSitive. If not, file and secure your registration data. To locate go to **Help: Registration**.

Log On the POS Program

- User – POS
- Password – POS

Back-up at Program Start-up

- Back-up to zip file prompt
- Auto back-up maintenance has been set at 12:59 am each night. The server (computer) must be left on with program running for this to occur.
- It is suggested that you back-up to CD once a week. Use the CD burner available.

Manager Console

- Options F2 – F10 - Full options available to advisor and selected advanced students.
    - Phase 1 Manager Console areas include Register (F2), Management (F3), Inventory A (F4), Inventory B (F9), Customers (F8), Vendors (F9), Report Center (R), Open Reg (F10)
- Keystroke shortcuts. Try to avoid use of the mouse if possible. Use F keys, tabs, or highlighted prompts with a return.
- Log in/out

Inventory Module (F4)
Departments

- All items will be listed in caps.

All screens follow a similar windows format. Add, edit, or delete.
Sample departments have been preloaded. (Apprael, Candy, Gifts, School Supplies, Snacks, etc.) All depts may be edited or deleted.
Listed alphabetically by department 3 digit codes (APP=Apparel).

Categories

All categories will be listed case sensitive (upper and lower case).
Highlight a department before assigning (adding) a category to it.
Add, edit, or delete the category list. A category may be reassigned to another dept.
Change (edit) existing categories (preloaded) if possible.
Special caution with deletions (delete all inv. items from that category, then delete the category)
Define Margins vs Markup with ? tab. Margins = MU as a % of retail price.
Set target margins (i.e. 40%) for apparel and gift depts.. Dot the margin selection.
Print a listing of your Departments and Categories for your record. F7 from the Department screen.

Open Dept and Open Categories

Purpose and use – Open Departments are used to ring items that will not scan – new items, damaged tags, older deleted items, etc.
Provides security control if misused – excessive open sales indicate non-scanning by employees. Review invoice history occasionally for misuse.
An Open Department and Open Categories (for major departments) have been preloaded as hot keys – use for items not scan able and items unable to locate.
Other Open Departments can be added as your inventory evolves.

Vendors (F9)

<u>4 key data items needed</u> for each vendor entered

1. Vendor ID code (3 digit letter code – i.e. 1st 3 letters of vendor name – SAM = Sam's Club.
2. Vendor name
3. Terms (COD, 30 day, 60 day)
4. Vendor SKU = Our SKU. <u>Always</u> check this box.

Add additional data later, contact name, addresses, phone #'s, fax #, vendor #'s.
Sample vendors have been preloaded. Always complete vendor list before entering inventory.
Vendors can be added on the fly when entering inventory if one was omitted.
From the vendor screen, print list for your records - F6.
Highlight vendor, vendor inventory list all items ordered from

Programmed keyboard

Up to 24 "hot" keys
Many of the function keys have been preprogrammed.
Enter all special keys, including all Open Dept/Open categories.
    Open keys for non-scanning items in a department. Tag off, new item, ...
Label special keys on the keyboard – Use Notepad 10 pt. font
Review all special transaction keys. (various tenders, qty, customer, discount, etc.)

Inventory

Design a SKU system for non-bar coded items to be labeled (Minimum 6 digits – Max 20 alpha/numeric)
Adding an inventory item. Use the Inventory console F9 to view inventory listing.
Check top menu line for correct category.
Normal for "Each" items purchased individually.
Bulk for "Case or Box" items, purchase by 24/case, order by 24, unit cost per will appear.
Descriptions as you would describe the item, color and size at end.
Cost per item is required. Consider shipping costs in your cost. For bulk items, box or case cost is required. The program will automatically calculate cost per item for the bulk.
Vendor list must be established before entering inventory. Identify the vendor or each item.

Margins vs Markup in setting prices.

Set a Target Margin % for each Apparel or Gift Dept. Category. Suggested retail price will appear as a guideline when cost is entered. Adjust price as needed to your specifications – odd, even, psychological, etc.

Enter quantity if known at time of entry.
Use the Copy function when adding similar items to save time (with candy - various Starburst or M&M's items, or with clothing - SM, Med, Lg, XL t-shirts)
Delete long description when copying an inventory record.
Add inventory qty. later by highlighting the item - rt. click – stock verify – enter count
F4 for adding alternate SKU's (hot key, box SKU, anything . . .) Check the item SKU most commonly used as the primary SKU.
** The use of sticky notes with a listing of each distinctive inventory item (a SKU, normal or bulk item, cost, retail, qty., and vendor) will help when adding existing items by having required inventory data immediately at hand. If a bulk item, identify qty per box/case, and box cost.

To Find an Inventory Item

In the Inventory Center (F9), access the Inventory List screen

Click on SKU (F5) or click on Description (F6) on column heading. Where ever (>) sign is identified, type a letter or word, or the start of SKU to locate an inventory record. For a more detailed Find is found using the (F3) tab.

Employees

From the Manager Console, double click on employees – 3.
Enter all employees from class lists. Add, edit, or delete in each record.
Employee ID – 3 digits (alpha or numeric) 1st 3 letters of last name, initials, student ID #
Employee Name
Enter Password – use the same digits as the employee ID for now, student can change later.
Address – Hour in class or store
Security groups – select from 3 levels - employee/cashier (level 1), student manager (level 2), store advisor (level 3) – each level adds additional access to the program.
View security settings from File: Definitions: Employee Security Groups: 3 levels
Add other employee data at a later date at your option.
Print a list of employee names and ID's for your record - F7.