

POS Information, Sales Screen, Barcode Labels (Don's Notes)

Email your question to: Don@Schoolpos.com

29 years as School Store, DECA Advisor & Marketing Teacher

Turn on computer and view desktop menu.

Info File

Manual

Help File (also F1 on current topic)

Sources for advanced student in store operations manual creation

Advanced lessons – examples are gift cards, inventory control, and bar code labels

POS support

 POSitive's phone #'s

 POS Systems Group #'s

Adobe program is preloaded

Log On

User – POS

Password – POS

Program Start-up

Back-up to zip file

Back-up maintenance – Auto back-up at 12:59 am, server must be left on

Need to back-up to CD once a week. Use the CD burner.

Manager Console

Options F2 – F10. Review all Management Console Centers.

Keystroke shortcuts

Log in/out. Time card in/out.

Inventory

Design a SKU system for non-bar coded items to be labeled

Adding an inventory item

Check top menu line for correct category

Normal for “Each” items

Bulk for “Case or Box” items, purchase by 24/case, order by 24, unit per will appear

Descriptions as you would describe the item, color and size at end

Vendors must be in place before entering inventory

Margins vs Markup in setting pricing

 Target Margin in Category

Enter quantity if known at time of entry. To add later, highlight item : Stock tab : verify count (F5) or highlight item: Rightt click : verify count

Use the Copy function when adding similar items to save time (use with candy - various Starburst or M&M's, or with clothing - SM, Med, Lg, XL t-shirts)

Delete long description

Add inventory later with highlight - rt. click – stock verify

F4 for adding alternate SKU's (hot key, box SKU, key word, anything . . .)

** The use of sticky notes with a listing of (a SKU, each or bulk, qty., cost and retail, along with the vendor) will help when adding existing items by having required inventory data immediately at hand

Review Inventory List screen

Notes, Pricing, Vendors, Links, Promos, etc.

To Find an inventory item

In the Inventory Center of the Management Console (F9)

Click on Find (F3) for a detail find procedure for SKU or a full or partial Description, or for a quick search

Click on SKU (F5) or click on Description (F6) on column heading. The greater than sign will appear. Enter number or letter item search starts with to find.

Invoicing

Register Center (F2) – Enter Invoicing to get the invoice/sales screen to appear.

Enter SKU or Scan item(s). Add additional items per the sale. Adjust for quantity and/or discounts as required.

For even priced amount totals use the Fast total hot key – no amount tendered or change.

Use the Cash total key to enter an amount tendered and change to be given displayed.

Use specialized tender keys for checks, house accounts, and gift tenders as presented.

Quantity sales – use the quantity hot key or the qty. tab key on the invoice screen.

Use the Open Department Key for item sales without SKUs. Enter price and note.

Use Item look up (INS) on the top invoice screen to access your inventory list to locate an item to include on the invoice or to locate information on the SKU.

Adjusting the normal invoice screen.

Discounts - \$ and %. Cashier must have management security approval to proceed. Use the discount tab key to enter % discount for an individual item or globally for all items.

Deleting a item or invoice - to delete a line of merchandise on the invoice, highlight the line and press delete key. To void the entire invoice, hit the cancel sale hot key or void invoice tab key (F9) and proceed.

Tax modified – to adjust to not charging tax if normally taxed, or to charge tax if none is normally charged. Highlight the item on the invoice to modify (yellow line), hit the Show More Options tab (F2) and locate Toggle Tax tab on the invoice screen (F8). Tax will change.

Split Tender – you may use any tender available to you. Cash, Check, Credit Cards, Gift Certificate (Cards), Store Account (AR Module in pro version). Enter the tender and amount.

Programmed keyboard keys – use hot keys and keyboard shortcuts whenever possible.

Printing selected invoices – after processing the tender, option is given to print (F7)

Access Invoice history (Register top menu : Invoice History : Enter Invoice # or scroll to date to locate a previous sale), reprint invoice (F7)

Accepting Customer Returns – to process a return you will create an invoice with a negative quantity amount. From the invoice screen, hit the Show More Options tab (F2) and locate Returns from invoice (F5). Enter the invoice # being returned, or if unknown, search the invoice history list, or locate from the inventory list, or scan the item if it still has the barcode. Select the item and process. The quantity will turn to a minus. Hit F10 to process and return tender or a store credit.

Procedures for streamlining transaction time – Multiple workers working at the station, use the keyboard to speed time, Train employees using a training file, etc.

Gift Certificates (Cards)

How to sell a gift card. Use gift card transaction hot key.

Enter card # (scan) and price paid. Complete the sale, print 2 receipts.

How to redeem a gift card.

Enter the items to be sold.

Use the Gift Tender key. Scan card when prompted. Retain the balance or give change out per your store policy.

Set a policy for change due or retaining the balance.

Print multiple receipts for all gift certificate transactions. One as a tender copy when balancing the register, the second to the customer, or more as needed.

Void card when totally spent – place back in rack and reuse

Register Balancing (F7) on the invoice screen

Close out the register at the end of a shift.

Blind count of all \$ items, including the opening bank in the drawer.

Set bank in drawer from the beginning will remain in drawer for the next shift.

Post sales and \$ count

Print sales summary report to summarize sales and tender received.

Deposit sales with the report in a secure place.

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).

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

Customers / House Accounts (F8) - *To access the Accounts Receivable module the Professional Version must be activated to allow staff to charge to their account.

Enter Customer Name

Address – enter classroom #, or phone extension

Customer type – Select a grouping of customers – Employees, Staff, Sports Teams, etc.

Terms – staff 30 days, others COD or specialty terms

Discount – For each customer type a preset discount may be added. A global discount % may be set, or a discount % by category may be used. (i.e. 10% on non-food categories only – no discount on food categories) Once set, every customer added in a similar type will reflect the same discounts.

Credit limit – set \$ amount

Sample customers and group types have been preloaded

To locate customer's account with, click name F4 in heading and type last initial to find Statements for accounts receivable can be printed after closing accounts at the end of the month.

Inventory Labels – Bar Code and Shelf

Purchasing Center (F5)

Label manager – option 6

Tag (check) individual item(s) already listed or

Enter a new item by SKU and quantity, then tag to print label

Use Import (F3) to access an existing list or Category listing. Query “Apparel” or “Sweats” to enter an existing query list, or create a new query.

Print labels (F7)

Items run will remain in the processed tab location until list is purged when totally finished

Sample label queries have been preloaded (i.e. Apparel or Gifts) To access Import Items (F3) and process the print with query.

Use Avery type labels (1” x 2 5/8”) 30 per page

Select start position on the page to use a previously used sheet and save label paper

Set up a Training (Emergency File)

Suggestions for an uninterrupted power supply during operations is to install a UPS Battery. VA 12+ rating.