

General POS Format With Dialog Payment Pop up's

Product Description	Quantity	Sale Price	Ext. Price
4MB 20-pin (4x8) RAM	1	12.95	\$12.95
1MB Cache	1	23.00	\$23.00
2-Button PS/2 Mouse	1	12.95	\$12.95
18-Port 10 BaseT Hub	1	99.95	\$99.95
4MB 20-pin (4x8) RAM	1	12.95	\$12.95
4MB DIMM (Fast Page)	1	11.00	\$11.00

POS & Orders *General and Detail*

WAASIMS DOCS RSA - CUSTOMER ORDER AND POINT OF SALE Create Customer Order - Point of Sale (POS) [F9]

WAARSA has two different forms for writing customer orders. Press Function Key F9 and view the dialog box to see. Cancel the Dialog or **POP UP** box click on the X.

[POS]

Includes the complete address of the customer allowing updating of the information. Also this POS allows items to be returned creating a record so the product can be repaired, returned to the manufacture or marked as surplus for accounting reasons.

[Receiving payment from customers and Payouts for vendors]

These are both handled by 5 different dialog pop up boxes. Red in color, Yellow titles are information and White are data entry points.

Why so many? It's a clear and simple way to address the different methods of cash register functions.

We call these register functions POS Tags.

SIMS POS - This tag has two functions.

- General Sales
- Customer Account

General Sales is a fixed account number 100. We call this "All General Sales". This is the Business Name and Person's name. You may edit the name and other fields, but not the account number.

Customer Account are accounts created to better serve you clients. There are four way to find a customer. Phone Number, Person Name, Business Name or Account Number.

Eighter selection, General Sales or Customer Account will invoke the same process for ring

up the customers.

SIMS POS has 4 sections on the this page.

Register Identification. A View area showing the operator, and Customer's name with Their tax information.

Customer Box. Customer Address Edit, purchase, discounts amounts and **Purchase F1** select button. This invokes the Blue purchase pop up format.

Order Status and function section. A status area and **Close F2** button to receive customer's payment.

Product section. List all the products selected to purchase with a **D** button, this is a delete button that can be clicked to remove a customer's item.

Overview of the 4 section

- ☞ **Customer Tax information Operator my select change the section for Tax to Exempt.**
- ☞ **Scan products to purchase. 1st press F1 or click the purchase button.**
- ☞ **Close out and receive customer payment press F2 or click Close button.**

Common functionally POS processes.

Detail POS Item Purchase Dialog Window

This blue form is a popup or dialog window. This window has three items that can be purchased. Each line has 4 items to build a product. There also is 4 control buttons. Each button helps edit the product line item.

Item Number	Quantity	Price \$	Serial #	Clear Quantity	Delete Line	Return Item	Delete
100071	1	12.95					
4MB SD-RN (4X8) RAM							
100077	1	11.00					
4MB DIMM (FABT PAGE)							
	1						

Esc / Close

Product Line Item

Item Number - This is a drop down field list of your inventory items. The description is displayed but the driving item is the Item Number. In this field you scan the product bar code number or type the number. On the UPC 39 or any bar code number. When typing in

the number the complete number must be entered. This includes the small leading number and the small ending number i.e. 0 8122-79839 5 So the complete number would be entered not including the (-) dash. I.e. 08122798395. Then press the tab. To get the next field.



Quantity - Enter a number 1 - 99999 . Then press the tab to go to the next field.



Price - Enter a number from .01 to 999999.99 Then press the tab.



Serial Number - Alpha Numeric field 35 characters long. Used for unique product numbers that identify the product.

Control Buttons



Quantity Clear - This is to zero out the quantity instead on entering different number in the field. Clear and type the correct number.



Delete Line - To remove the line entry, customer change of mind, or a double scan.

Simply click the delete button. Try not the negative out the item to make it a zero balance this will cause your inventory count to be incorrect.



Return Item - When the item is returned, scan the item, next edit the quantity returned and click the return button. This will price will be negative and the quantity. If the product has no problems and can be returned to inventory. Leave as is and restock. If Damaged?



Damage Item - Click the damage item button and later use the RMA function to mark and identify the product. Damage Item works like the Return item except the quantity will be positive not negative and the price will be negative.

How to Close Out the invoice.

- **Cash** - Click the cash button then click in the cash box and enter the amount tendered and press enter or tab.
- **Check** - Click on the check button then enter the check number.
- **Credit Card** - Click the credit card button and enter the credit card number, exp. date and Auth. number
- **Void** - Delete every item on the invoice (click the D button to the right of each line item) and follow the instruction on the popup message.
- **Store Charge** - Customer purchase on account. Posting Payments are with the

Payment Type	Amount
Credit Due	\$0.00
Purchase	\$172.80
Sales Tax	\$14.70
MS Discount	\$0.00
Total Sale	\$187.50
Amount Due	\$0.00

Accounts Receivable Menu.

- **Order** - if the customer wants to keep the order, Click Done and the order is converted to a quotation the quotation can be filled by later, pressing

F12.

- **Split payments** can be made easy. Example Check and Credit Card.
- Click the Check button edit the total sale displayed in the check payment window to reflect the check payment. Next enter the remaining amount in the Credit Card payment window. Enter the Credit Card number and exp. date. Click only one

payment type.

- **Exchange** - To help identify a product returned for a straight exchange, Exchange square can be clicked only marking this sale with a exchange notation.

Post Payment form allow the editing of the amount paid. Split payment are allowed, exchange, Credit card payment, including the persons name, CC number and Month / Year

I a credit is to be posted enter the credit about. And the credit will be deducted form that customers record. I a person is credited, a new account for that person should be created this manages the credit due that person, in case they lost their credit slip.

- **Quotation**

If the sale is closed as an Order, no payment declared, the order is converted to a quotation. This quotation can be printed and later opened from eighter the POS types and then closed when a payment type is declared.

Payment of Invoice/Ticket

Edit the Cash, Check Credit Card information and Print the Invoice.

Post Payment

Customer #: 100
 Company: All General Sales
 Customer: General Sales
 Invoice #: 1781
 Inv. Date: Sun, Feb 20, 2005

Credit Due: \$0.00
 Purchase: \$172.80
 Sales Tax: \$14.70
 MS Discount: \$0.00
 Total Sale: \$187.50
 Amount Due: 0.00

Payment Type: Shipping \$ []
 Cash \$ 0.00
 Check \$ 0.00
 Credit Card \$ 187.50
 Credit Paid: \$0.00

Buttons: CASH, IV, Exchange, BACK, Close Sale

45240215004 10 07
 CreditCard# Expiry Date Check# Approval Code
 Feb Wagon CC 3 digit:
 First Name: Last Name:

Printing of invoice or quotation has four different methods.

1. 4.2 in form that prints on a POS Ticket

Printer.

2. 8.5 in Item Line form that prints on a laser, jet ink and dot matrix printer.
3. 8.5 in Item Line w/three lines of product description under the line item, it also prints on a laser, jet ink or dot matrix printer.
4. No printing just cancel the print dialog by clicking on the CANCEL bottom.

There is no exit to a menu from the POS form, the items can be deleted, returning the items to Inventory and the no sale is voided or closed out as an order.

POS Detail View Shipping Page 3

SIMS - RSA ~ Customer Shipping									
Account # 131	Spell Check								
Ship to Company Name Williams Inc	State as Bill To								
Agency Jay Williams	Deliver By Date								
Address 19021 west lane suite 1221	Ship Via UPS								
Ship to City Denver	Invoice Terms 693								
State CO	Question #								
Zip Code 80010	Invoice #								
Cancel Date	Invoice Date 12/18/2003								
<table border="1"> <tr> <td>Done</td> <td>Print</td> <td>Order</td> <td>Amount Paid 364.27</td> <td>Shipping \$</td> <td>Credit Paid</td> <td>Sales Tax \$17.34</td> <td>Total Sale \$ \$364.27</td> </tr> </table>		Done	Print	Order	Amount Paid 364.27	Shipping \$	Credit Paid	Sales Tax \$17.34	Total Sale \$ \$364.27
Done	Print	Order	Amount Paid 364.27	Shipping \$	Credit Paid	Sales Tax \$17.34	Total Sale \$ \$364.27		

Shipping Form

Edit the shipping information and add an invoice memo. When completed click the BACK button or F2 for Close, starting the customer form of payment.