POS (Point of Sale) 2

STARTING I-SELL:

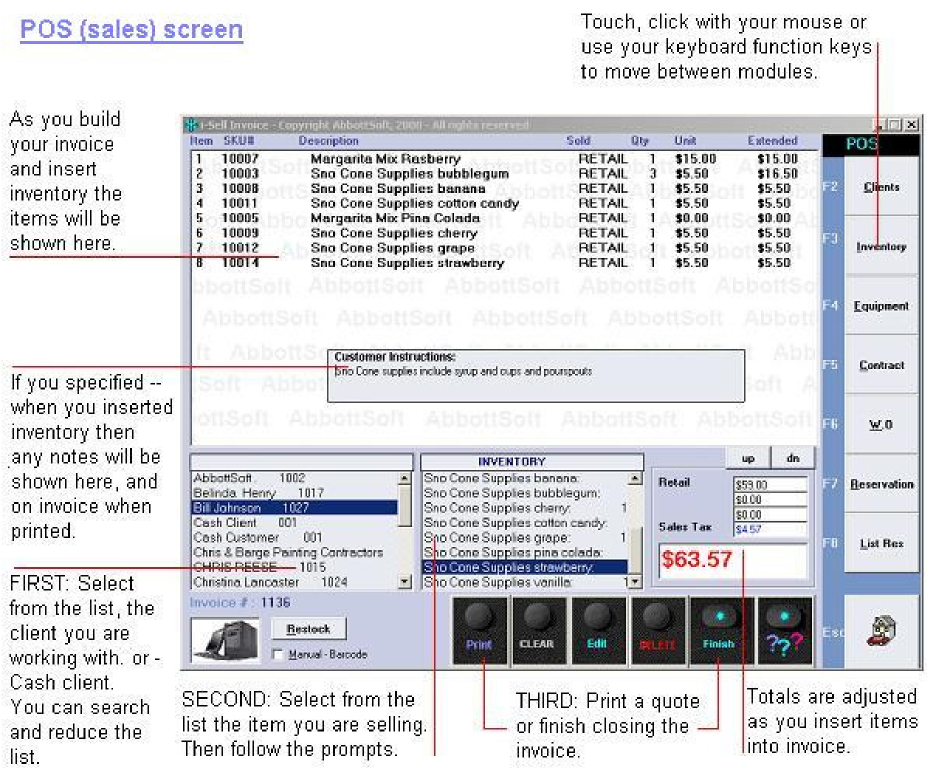
From your home page click on the on the touch button titled "POS." and you will see the I-Sell home screen appear.

CREATING A SALE:

This will be a step by step tutorial which will lead you through creating a sale.

NOTICE: You must have some clients and sales inventory stored in your client database and inventory database before you begin this section. If you have not inserted clients and inventory already then please go to the applicable chapter and do so.

You start with the sales (invoice) screen open. (See fig 2-1-1)



When to use this module instead of the rental module:

1. Use the I-Sell module when you are just selling and not renting.
2. Use the I-Sell module when you will run out of room on a printed contract.

POS (Point of Sale) 2

SELECT THE CLIENT:
The first thing to do is tell I-sell which client you are working with. The client can be either recorded in your client database or a "Cash sale = Client 001"

You can also type all or part of the clients name in the search field and press the Enter key and your list will be shortened to match your search information.

Check the window above the client list and make sure the clients name is showing. If the clients name is not in the window, click on the clients name again.

SELECT THE INVENTORY:
Once your client is selected you then retrieve from your inventory database any and all items your client has chosen to purchase and insert these items onto your sales screen.

There are two ways of selecting these items.

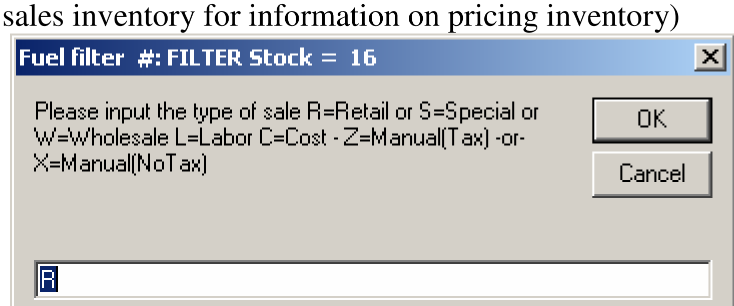
1. Pick items from the inventory list by clicking twice with your mouse. This is the easiest way to sell.
2. Use the manual method and either type in the SKU number or read with a bar code reader. (Toggle with Alt + M) This is the fastest way to sell.

Once you have selected any item stored in your inventory database another window will appear asking for the quantity sold.

The default for this window is one item. If you are only selling one then just press the Enter key on your keyboard or click on the OK button else type in the quantity then Enter or OK.

The next window will ask if you want to price this item R=Retail, S=Special, W=Wholesale, L=Labor, C=Cost – Z=Manual(Tax) - or X=Manual(No Tax)

Depending upon the selection you make determines the unit price the item will be sold for. If you choose Z or X then you can manually insert any price you want and tax will or will not be charged.
(See chapter on sales inventory for information on pricing inventory)



After telling I-sell how many of the item you wish to sell and the price you are selling it for you will see the item appear in the Sales window and it will be extended and totals computed.

If, when you inserted the item you placed any information in the two notes lines then you will also see a box appear which includes the information. You can use this information for both your sales person and the client. The information will be printed on the sales receipt.

At this point I-sell is ready for you to either enter another inventory item or continue with the closing of the invoice.

QUICK SEARCH FOR CLIENTS AND INVENTORY:
On the Sales screen, above both the client and inventory list is a search field.
With this field you can enter either part of the client name or part of the item description and then press Enter. The list will be reduced, to only those clients or items, which match the search information, you provide.

CORRECTING A ENTRY ON INVOICE WINDOW:
It is possible that you could make a mistake when entering items to be sold into the invoice window or that your client will change their mind while you are ringing up the sale.

You can easily change or delete items already entered or even clear the window and start over. The black radio control buttons located across the bottom of your POS page are used to accomplish these tasks.

Just activate the appropriate button "Edit, Delete or Clear" and follow the prompts.

CLOSE THE SALE AND PRINT INVOICE / SALES RECEIPT:
Once you are satisfied that you have inserted into your invoice screen all the items your client wants to buy then it is time to close the sale and create a invoice or sales receipt.

To continue, activate the tender screen and record the type of payment and other important information - activate the "Finish" radio control button on the POS page.

If your version supports the client database and if you choose your client by highlighting their name from the client list on the POS page, then you will see the client information shown on the right side of the tender screen.

If you failed to select a client (even a cash customer) then you will see a warning telling you to activate the "Cancel" control button, return to the sales screen and select a client, then try again.

If you have selected a client from your database then I-sell will check the clients information and determine their available credit, tax exempt status and if they require a Purchase Order Number on the invoice.

Warnings will be displayed at different times during the closing of the sale if needed and you are expected to respond accordingly.

The program will display information fields in Yellow which is required before you print the invoice.

Information such as the method of payment, clerk initials, client Purchase Order, Credit Card Approval, etc.

CLOSING A SALE AND PRINTING INVOICE/SALES RECEIPT: (continued)

Order of completing the tender page.

1. Click on the method of payment. Cash, check etc. (Available choices depend upon the version of I-sell you are using) and make sure the total due is shown on the left.
2. Under "Tender Information" you can type into the "Amt. Tendered" field the amount of money paid to you by the client and the change owed back will be displayed immediately just below where you are typing. (Not available on Lite version)
3. If your client is using a check or credit card then you will need to fill in the check number or the credit card number with the expiration date.
4. In the "Clerk Information" box type in your initials or number. (keep it short)
5. In the "Client Information" - "PO# or Approval" field type in either the clients Purchase Order number, the credit card authorization or if needed management approval number for exceeding the clients credit limit or for ringing up a cash refund or credit to account etc.
6. Depending upon the version of I-sell, you may be allowed to credit the sale into your clients frequent buyer totals or type in a brief note which will print on the invoice.
7. Activate the "Close-Print" control button to print the invoice.

USING A BAR CODE READER:
You can use most any bar code reader which acts as a wedge between your keyboard and your computer.
There are many types of bar code readers available. We suggest you choose a laser gun with as great a depth of field as feasible. The wand is rarely used because it is too hard to read codes.

When you scan over a bar code which it recognizes then it will automatically fill in the part number, if you have the POS page set for Manual.

Using a bar code will speed up the insertion of inventory into a invoice as long as all of your items have a bar-code attached.

To toggle the Manual (bar-code) on or off then click on the "Manual" radio button on the bottom left of your POS page. *Next to the picture of the computer.
When using barcode (manual method) the inventory list will disappear and you will always start with the prompt for the part number.

To return to the automated method, first clear the prompt asking for the part number from your page, then click on the Manual control button and you will see your inventory list appear and you can then click on any item shown and continue the sale.

While your printer is producing the invoice/sales receipt; I-sell is adjusting and recording your inventory, client information, daily, monthly and yearly income totals, sales reports, tax obligations and Account receivable database. All this is completed by the time the invoice finishes or about as long as it took you to read this paragraph.

OTHER TYPES OF INVOICES:

By default the module will print to your receipt printer. The receipt printer should be the default printer setting in Windows. Before you can use this printer with the POS you must first click on the little computer on the bottom left of your POS page. You have three choices. Print to just the receipt printer, print to the contract printer or both. We suggest you start with the receipt printer then change later if needed.

If you want to occasionally offer a 8x11 invoice then from the home page of your POS and just before you activate the finish radio control button, click on the "print" radio control button and a copy of the invoice will be sent to your contract printer. You can choose from two types of invoices. A copy of the finished sale or a estimate (proposal, quote).
NOTE: When using the print radio control button you must first click on the client name for the second time. Just prior to clicking on the print button.