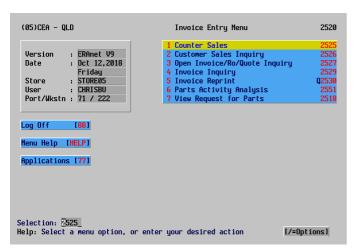
## Processing a Cash Sale

\_\_\_\_\_

1. Starting Screen.



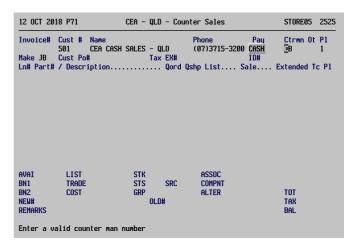
2. Type "2525" for Counter Sales and press enter.

Invoice#	Cust # Name			Phone	Pay	Ctrmn Ot	P1
	Cust Po# / Description		: EX# Qord (	Qshp List	ID# Sale	Extended To	c P1
AVAI BN1	LIST TRADE	STK STS	SRC	ASSOC COMPNT			
BN2 New# Remarks	COST =De1)(E=Ent)(M=M	GRP OLD	)#	ALTER	O=100\(CI=	TOT TAX BAL	

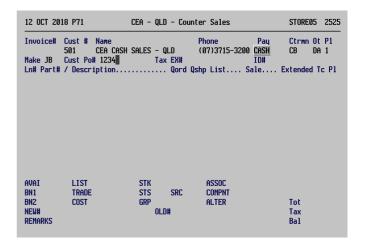
**3.** Press Enter and then type customer name, number or Cash Sale number (501 in this case)

					ınter Sales		STORE05	
Invoice#	Cust # Name				Phone		Ctrmn Ot	P1
	501 CEA CASI				(07)3715-320			1
	Cust Po#				0-1-11-1	ID#	C. Nordani T	_ D1
.n# Part#	/ Description		!	yora	usnp List	Sa16	Extended 1	C PI
IAVAI	LIST	STK			ASSOC .			
3N1	TRADE	STS	:	SRC	COMPNT			
BN2	COST	GRP	OI DA		ALTER		TOT	
NEW# REMARKS			OLD#				TAX BAL	
	stomer has open :						DIL	

\*If the customer has any open invoices a message will appear at the bottom of the screen Press "Y" here if you wish to access an open order. 4. Enter your counterman ID



**5.** Press enter to skip the order type and then type in a purchase order number in the PO field and press enter.



**6.** Type the part number required and press enter then type the quantity needed and press enter.

12 OCT 2018 P71	CEA - QLD - Co	unter Sales	STORE05	2525
Invoice# Cust # 501 Make JB Cust Po	Name CEA CASH SALES - QLD # 1234 Tax EX#	Phone Pay (07)3715-3200 CASH ID#	Ctrmn OT CB DA	PL 1
Ln# Part# / Descr	iptionQord FILTER PQ44 1	Qshp List Sale		c Pl 1
AVAI LIST BN1 TRADE BN2 COST NEW# REMARKS	STK STS SRC GRP OLD#	ASSOC Compnt Alter	TAX	6.05 38.9 15.55 1.56 17.11

<sup>\*</sup>From here repeat step 6 as many times as needed.

**7.** Press "e" then enter when the order is ready to be completed.

12 0	CT 2018 P71 CEA - QLD	- Counter Sales	STOREØ5 252
Х	Invoice#	X Control No. 501	
1	Code, Comments		
2	Sale Type R	3 Tax Exempt No.	
4	Pay-Method CASH	5 Picker / Time	
6	Order Date 12/10/18	7 Checker	
8	Required Date 12/10/18	9 Packer	
10	Cust Po# 1234	11 Run No.	
12	Ship To JCB CEA (QLD CASH SALES)		
	103 AXIS PLACE	X Bill To	
	LARAPINTA		
	QLD 4110		
X	Total (No Tax) 15.55	18 Credit Card #	
Х	GST 1.56		
14	Misc 0.00		
15	Freight 0.00	21 Order Type DA	
16	Restock Chg. 0.00	22 11 15 11 11	
17	Surcharge 0.00		e <sup>e</sup>
Х	Total Invoice 17.11 =Ent)(D=Del)(Line#)(L=LineItms)(Q		

**8.** On the order close out screen (above) ensure that all necessary fields are completed. Press the field number then enter and type the info required. See below:

Field	Description	Use
1	Comments	Always enter contact name, vehicle details and con note (if applicable)
4	Pay Method	Select from a range of pay types. See list at the bottom of the screen for available options.
10	Cust. PO	Enter the customer purchase order number
12	Ship to Address	Enter the full shipping address for the order
13	Ship Via	Use "/" to lookup ship method. ALWAYS make sure repair orders have WS in this field
15	Freight	Enter any applicable freight charges.
18	Credit Card	Enter Card Details (see Credit Cards)
23	Name for Invoices	Enter customer details to be printed on the Invoice.

9. See completed fields highlighted below.

2 (	DCT 2018 P71	CEA - QLD	- Cou	inter Sales	STORE05	2525
Х	Invoice#		X	Control No. 50	1	
1	Code,Comments	John Smith				
		3cx - 2515151				
		CQP000001234 -	TNT RO	IAD		
2	Sale Type	R	3	Tax Exempt No.		
4	Pay-Method	CASH	5	Picker / Time		
6	Order Date	12/10/18	7	Checker		
8	Required Date	12/10/18	9	Packer		
LØ	Cust Po#	1234	11	Run No.		
12	Ship To John Si	nith	13	Ship Via TNT ROAD		
	. 123 Bad	ckhoe Road	X	Bill To		
	Digger	ville				
	QLD 400	<del>30</del>				
Х	Total (No Tax)	25.55	18	Credit Card #		
Х	GST	2.56	19	Authorization #		
4	Misc	0.00	20	Deposit Chq.		
15	Freight	10.00	21	Order Type DA		
16	Restock Chg.	0.00				
17	Surcharge	0.00	23	Name For Invoices	No	
Х	Total Invoice	28.11	Tot	al Line Itms	15.55	
(F	F=Fnt)(N=Nel)(Li	)(zmtTenil=1)(Her	N=Ina)	(CI=Custing)(CC=CL	Comm)	

- **10.** Press "e" and then enter. Then "p" and enter to produce a picking slip for the parts to be picked.
- **11.** Once the parts are picked, and all parts on the order are accounted for, the picking slip will need to be invoiced. To do this, on the main screen (*Step 1*) enter "2525" again then enter in invoice number "XXXXB" and press enter.
- **12.** Enter through until your cursor is at the bottom of the screen. Press "e" and enter to go to the order close out screen again (Step 9). Press "e" and enter then "I" and enter to invoice the order. Type in the customers contact details if applicable and the print the invoice. Press enter again and unless the invoice is being emailed (See "Creating a Quote" for email instructions) keep pressing enter until the invoice prints.
- **13.** Take payment from the customer via cash or credit card (see taking payments). Sale completed!

## **Credit Cards**

When entering credit card details it is highly important to make sure all information is entered. The card number itself must follow a specific format.

For the system to recognise it is a correct number it needs to be 20 characters long. See example below

(XXXX\*space\*XXXX\*space\*XXXX\*space\*)



<sup>\*</sup>The expiry date need to be entered twice as there is a bug where it will not show up when finalising the order.