Setting Up QuickFind

Do your clerks click on the viewer to find items that aren't tagged, or do they use the description field to look up items that they know are in stock, but they don't know the SKU? Wouldn't it be easier if they could look in one place for all these hard to find items, and easily add those to a transaction?

Let me show you how to set up the QuickFind Grid in Point of Sale. Now the QuickFind grid is an online price book that allows you to store items where skus or barcodes aren't readily available such as concrete, sandbags, or items that are stored or loaded from another location. Using QuickFind allows your clerks to be more efficient when completing transactions.

You can set up two different kinds of QuickFind grids, and this module teaches you how to produce both, as well as how to choose the one that best fits your needs or requirements.

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Types of Quick Find Grids

You have your choice between two grid formats: text or images.

Text grids show the item SKUs and are set up in columns, rows, or columns and rows. You're limited to 6 columns per grid, but you can have an unlimited number of rows. Eight rows display on each page.

Text grids have two advantages: The data is stored on the system, so it's easily accessible to every terminal, and you can add an unlimited number of items. Items that come in a variety of sizes such as lumber and piping work very well in a text format.

Image grids display photos or illustrations of up to 15 items at a time. The images are stored on one computer, so the data must be shared and all terminals must be mapped to the PC that is storing the images. Although setup is more complicated, image grids provide your Point of Sale clerks quick visual confirmation that the item selected is the correct one.

Before adding a subgroup in items, make sure all of your image files are in the proper format, the correct size, and are stored in the correct location.

Details about preparing your images can be found in online Help.

Now that you understand the two types of grids, let's set up some QuickFind grids. We'll start with a text grid, the easiest one to set up and one that is used most often.

Starting in Point of Sale, open the Tools menu and select "Setup QuickFind."

Type a name for this grid in the Main Group box. This is typically the department or category of items that will populate the grid, such as Lumber or Electrical. Keep in mind that punctuation symbols cannot be used when setting up the names.

Tab over and enter a sub group.

Then select the type of grid; in this case, text items.

After you type a description for this subgroup, press F5 to save the grid. Now you're ready to start adding items to the grid.

Type the column headings for the subgroup you just added. Here, we'll use the type of wood.

Next, add the row labels.

If you know the SKUs for the items, enter them in the appropriate cells. Otherwise, use the viewer to locate a SKU. If your cursor is in the correct box when you look up the SKU, pressing Select adds it to the grid automatically.

As you create the grid, and especially when you are done, press F5 to save your work.

Now, when your clerks are at Point of Sale and a customer buys some pressure treated 2x12s, they can open QuickFind to quickly locate a SKU and add it to a transaction.

Setup Text Grid

Text grids work very well for items that can be sorted by two characteristics, but sometimes a picture is worth a thousand words (or sku). Think about how helpful it would be to see an image of decorative molding, rather than having your clerks guess what style the customer is buying.

Setup Image Grid

Setting up the image grid is very similar to the first steps in setting up a text grid. Start by entering the department and subgroup. Since you just added a subgroup to Lumber, and this subgroup is also in lumber, just type the new information directly into the box and save.

Enter the description, then click a box to add the first item. Type in the SKU or use the viewer to add a SKU. Add your own description or leave it blank and let the inventory file fill it automatically. Be sure to enter the exact name of the image that you want to use for each item.

When you are finished, press F5 to save the changes and close the window.

Once you've set up your first QuickFind grid, whether text or image, you'll realize what a timesaver they are at Point of Sale. As you continue adding groups and subgroups, remember that you can mix the format within each category, using whichever one is best for a particular subgroup.

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