

Saved Transactions Overview

Now that you know the ins and outs of completing basic sale transactions, let's learn more about saved transactions.

Saved transactions are similar to sale transactions, but instead of being completed within a few minutes, they are created and completed over an extended time period.

Now you may be thinking that saved transactions sound a lot like the suspended transactions you learned about earlier. And you're right.

Suspended transactions are a special form of saved transactions that are intended to be completed or deleted by the end of the business day.

In contrast, the saved transactions we'll be discussing here, are started one day, saved, and recalled at a later date for invoicing.

After completing this lesson, you'll know the different types of saved transactions.

You'll also know how to create a saved transaction, recall and complete it, and how to void or delete saved transactions.

Topics

- Types of Saved Transactions
- Create/Save
- Recall/Complete
- Void/Delete

Types of Saved Transactions

Let's start by learning what types of saved transactions you'll be working with.

These include Estimates, Bids, Orders, Special Orders, Advanced Rainchecks, and Layaways.

Estimates, also referred to as quotes, are created when a customer asks you to quote prices on a list of materials.

An estimate typically guarantees prices for a specified time period.

If a customer agrees to the prices and quantities in the estimate, you can change it into a Bid.

You'll use the bid to create one or more orders.

Changing the Bid into an Order gives you flexibility in setting up shipping and invoicing dates.

Special Orders are similar to orders, but they involve merchandise that isn't normally stocked in your store.

Advanced Rainchecks can be created to guarantee the price for a promotional item that is out of stock, while Layaways are saved transactions that allow customers to spread out payments for a purchase.

You'll become familiar with the details of each of these saved transactions in future Training on Demand lessons.

For now, let's concentrate on how to create and recall any saved transaction.

Create/Save

Creating a saved transaction is simple. You'll start in Point of Sale, just as you would for a normal sale.

Special orders, orders, and estimates are the most common types of saved transactions.

They each have a button on the ribbon menu.

Clicking one of these buttons, or pressing the shortcut key, will begin that type of transaction.

Another way to begin a saved transaction is using the Start Transaction key. Pressing F2 opens a menu that includes Layaways and Rainchecks, as well as Orders, Special Orders, and Estimates/Quotes.

Simply click a button or type the associated number or letter to begin that type of transaction.

For instance pressing five opens a quote or estimate.

The posting screen looks the same, but notice that Estimate appears in the title bar of the screen.

You're now ready to complete the customer information and begin adding items to the transaction.

Once you have finished entering the details, total the transaction as you normally would.

Since this is an estimate, the "Finish Estimate" menu displays instead of the tender screen.

There are several options available in this menu but the first two—"Save without printing" and "Save and Print"—are the most commonly used at this point of the transaction.

If you are creating an order, special order, or layaway, you may be prompted to take a deposit.

You can also take a deposit manually using option "D – Accept Deposit" on the Finish order menu.

Once you've saved the transaction, the system displays the assigned document number and requests acknowledgment. Press Enter.

The document prints automatically if you selected that option, and the system returns to the POS window ready to begin a new transaction.

At this point you may be wondering "What if I forgot to start my transaction off an estimate? Do I have to re-enter everything?"

Fortunately no, if you're in the middle of an in-process transaction, you can save it as an order or estimate very easily.

If you've started a sale transaction and need to convert it to an order or estimate, first finish adding your items to your sale transaction, then proceed to the Totals screen where the system is prompting for payment.

Press F5 to save the transaction.

The window that opens gives you the option to save the transaction as an Order, or Estimate.

A document number is assigned, and the transaction is saved.

Recall/Complete

Now let's look at how you can recall that order so you can edit it and complete it as an invoice.

Point of sale offers several ways to lookup transactions.

They include Dot Lookup, the POS Document Viewer, and document barcodes.

The method you choose depends on what information you have at the time.

You can use a “Dot lookup” if you know the document number. Let’s take a look at how this works.

There’s a reason this method is called a dot lookup.

It’s because you’re entering a dot, or period, followed by a document number in the customer account field.

The dot tells the system that this is a document number not a customer name. Remember “dot for document.”

Press Enter, and the system recalls the saved transaction.

You can then make any needed changes, add additional items, or invoice the order.

If you are recalling a document that you just saved, say to print an additional copy or because you selected the wrong option in the Finish menu, there is a quick shortcut.

Simply enter a “dot” or period into the customer box and press Enter.

This recalls the last saved document without having to enter the number.

That is all fine and dandy if you know the number for the document you want to work with, but what if you don’t?

Fortunately, there is an easy way to lookup saved transactions to the point of sale document viewer.

In Point of Sale, press F11 to move your cursor to the Customer field, then press the Menu key to open the Header menu.

Then in the favorites section of the Ribbon, select “Documents”. Select option 5 to view documents.

The POS Document viewer opens and you can enter any information that you know, such as Customer Account or order Type.

You can also adjust the “Thru Date” to only view transactions that were saved in a certain timeframe.

After you fill out the information, click refresh or the plus key to see a list of documents than meet your criteria.

If you don’t have any information to narrow your search, simply press the Refresh button and the system gives you a list of all open documents on the system.

Remember, this is a viewer, so all viewer functionality including sorting and filtering is available to help you find the document you are looking for.

Use the arrow keys to highlight a document you’re looking for, then press F6 to display the details.

This is helpful in making sure you have the correct transaction.

Once you’re sure that the correct document is highlighted in the viewer, press Select, (F4), or Enter.

The system then recalls the document and opens it within Point of Sale.

Some stores set up their Point of Sale systems to automatically search the POS viewer for you.

Ask your supervisor if this is how your store is setup.

When automatic search is setup, entering a customer in Point of Sale triggers a message if the customer has open documents, another name for saved transactions.

The default is No, so pressing Enter bypasses this message.

However, if you answer “Yes,” the system automatically filters the documents in the viewer and displays only this customer’s documents.

This lets you quickly select a document or view details.

Finally, you can search for saved transactions if your store uses barcodes on a document.

Again, check with your supervisor to see if this is in place.

Enhanced POS forms automatically generate and print a barcode on saved transactions.

If you press F11 to place the cursor in the customer field, then scan the barcode, the saved document automatically loads into Point of sale.

This can be especially helpful in situations like “will-calls”, where a copy of the order is attached to the merchandise. It also helps eliminate typing errors.

Once you have recalled the saved document, you can add or remove items, adjust quantities and pricing, or change any other information including the transaction header details.

Pressing the Totals key, brings up the “Finish” menu.

Then you can resave or invoice the transaction.

Void/Delete

One thing to note is that if you select “Void Transaction” while a recalled document is displayed in Point of Sale, it will NOT delete the saved document.

Any changes you made since your recall will be discarded, but the original document, as it was last saved, remains in the system.

Voiding a saved transaction is like “exit without saving”.

If you wish to actually delete a saved document from the system, you must first recall the document and navigate to the header screen.

Notice that the F10 key that is normally labeled void in point of sale is now labeled Delete.

Pressing F10, and confirming that you wish to delete permanently, removes the document from the system.

Note that if deposits were taken on an order, they must be refunded from POS before you can delete that order.

You may also have access to a Delete button in the Document viewer.

Deleting documents through the viewer is handy because you can use the check boxes to select multiple documents to “Delete”.

Whichever method you choose, remember to be careful! Deletion is permanent.

In this module, you learned how to create, recall, and delete saved transactions.

In this lesson, we’ve discussed an overview of how to create, recall, and delete saved transactions.

Be sure to follow up on the other modules covering the specific types of saved transactions to learn more about each one.

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