POS Lookups

During the course of a day, you will often find yourself looking things up in Point of Sale. Most often, you will have to look up a customer's account or find a specific item for a customer.

In this lesson, you will learn how to look up a customer's account, as well as how to look up and post items to a transaction in Point of Sale. Specifically, we will show you how to use:

- Customer Lookups
- Barcode Scanning
- Manual SKU Entry
- Smart Lookup
- Item Description Lookup and
- the QuickFind grid

Let's take a look at these. We'll begin by launching Point of Sale.

Let's look up the customer's account. To do this, first click in the Customer field.

If your customer knows his account number, you simply type it here and press Enter.

If the customer doesn't know his number, no problem. It's easy to look up using the customer's name or their telephone number.

You've already moved the cursor to the customer field, so start typing the customer's name. If this is an individual's account, you would begin with their last name. Here, we're looking up a business account, so we'll type the business name: Best Plumbing.

The customer list opens, and, as you type each letter, the names in the list change. When you find the name, you can use the up and down arrows to highlight it, click it with the mouse, or continue typing until the name is highlighted, and press Enter.

A customer information box may display depending on how your options are configured. If it does, check to make sure you have the correct account. Press Enter if this is the customer you're working with, or cancel to continue the search.

If a customer belongs to your Loyalty program you can scan the loyalty card at the Loyalty Club prompt, and POS will find the correct account. If you do not see the Loyalty Club prompt, click on "Misc" in the Ribbon menu, then click "Enter Loyalty Number".

Some customers, like the one we're working with here, have arranged to have their billing broken down by a particular project or location. When this is the case, a list of job accounts opens automatically. Ask your customer which job account this purchase should be charged to, and select that account.

Press Enter to move to the Item SKU field.

Now you are ready to continue with the transaction.

Once the customer has been selected, you are ready to post items to the transaction. If your Eagle Point of Sale station has an attached barcode scanner, the easiest way to post the item is Barcode Scanning. Just make sure your cursor is in the Item field, then scan the item's UPC barcode with the barcode scanner.

Typically, scanning an item enters a quantity of one. If the customer is buying more than one of the item, either scan the additional items, or manually change the quantity and press the [enter] key.

The best practice is to scan each and every item as it goes through the register.

Some items, like lumber, do not usually have a UPC barcode on them.

For these types of items, the easiest way to post the item is to place your cursor in the Item field and Type the SKU.

Tab over and enter the quantity, then press the [enter] key.

Smart Lookups give you alternate ways to lookup items when you don't have a scanner or a SKU to enter.

You can enter the Manufacturer's part number and click Manufacturer Lookup icon…

You can enter the Universal Product Code – commonly known as a UPC or a Barcode and press Enter, or the UPC Lookup icon.

And finally, you can enter the Serial number - if one has been entered into the inventory file.

Now, I've shown you what to do if you have information to enter into the Item field. But what if the label is missing and you don't have any of these pieces of information?

You'll have to use the item's description to look it up. Let's see how you would do that.

Imagine that a customer hands you a one inch galvanized pipe tee with no barcode on it. Place your cursor in the Description field. Type T-E-E and press Enter.

A list of items that contain TEE in their description displays. Click the arrows to scroll through the items. When the list is long, as it is here, narrow the search by adding additional information in the Description field.

When you've located the item you are looking for, press Enter to pull the SKU into the Point of Sale Posting screen.

Then enter the quantity and press Enter to post the item.

Here are some tips for using the Description Lookup.

Try to search with only one word. If you enter multiple words, the item you are looking for may not show up unless you enter the words exactly as they appear in the item's description.

Here's an example. When I type MOP-space-&-space-GLO, nothing displays. But if I type MOP&GLO without spaces, I find my item.

You can also place an asterisk at the end of your word. This will act as a "wildcard" character and will broaden your search and give you a better chance of finding the item or items you are looking for.

Let's look at this example also. When I enter MOP with an asterisk, you can see how many more results appear. Scroll through the results, highlight the item you're looking for, and press Enter.

QuickFind is another way to lookup items, such as PVC or wire, that aren't normally tagged with SKUs or barcodes. QuickFind is an online "binder" that can be set up on Eagle.

If your system has QuickFind set up, just click QFind on the Ribbon to begin.

Your customer has 3 10-ft lengths of 4 inch perforated PVC drainage pipe.

To find this item, first select the item's category, in this case Plumbing. Pick the subcategory, which would be PVC pipe. Then find the item in the grid.

Clicking the SKU brings the information to the posting screen and you can enter the quantity and post the item.

As you've seen, Eagle's Point of Sale gives you several powerful, yet easy, ways to lookup Customers and items. When you determine the best way to look these up, you can keep your line moving and your customers happy!

About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software that is designed around the needs of our manufacturing, distribution, retail, and service industry customers. More than 40 years of experience with our customers' unique business processes and operational requirements is built into every solution—in the cloud, hosted, or on premises. With a deep understanding of your industry, Epicor solutions spur growth while managing complexity. The result is powerful solutions that free your resources so you can grow your business. For more information, connect with Epicor or visit www.epicor.com.

Corporate Office
804 Las Cimas Parkway
Austin, TX 78746
USA
Toll Free: +1.888.448.2636
Direct: +1.512.328.2300
Fax: +1.512.278.5590

Latin America and Caribbean
Blvd. Antonio L. Rodriguez #1882 Int. 104
Plaza Central, Col. Santa Maria
Monterrey, Nuevo Leon, CP 64650
Mexico
Phone: +52.81.1551.7100
Fax: +52.81.1551.7117

Europe, Middle East and Africa
No. 1 The Arena
Downshire Way
Bracknell, Berkshire RG12 1PU
United Kingdom
Phone: +44.1344.468468
Fax: +44.1344.468010

Asia
238A Thomson Road #23-06
Novena Square Tower A
Singapore 307684
Singapore
Phone: +65.6333.8121
Fax: +65.6333.8131

Australia and New Zealand
Suite 2 Level 8,
100 Pacific Highway
North Sydney, NSW 2060
Australia
Phone: +61.2.9927.6200
Fax: +61.2.9927.6298