

POS Lookups

During 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 course, we'll show you how to use the system to find this information using a variety of methods including scanning, entering data manually, and more.

Topics

- Customer Lookups
- Item Lookups

Customer Lookups

Let's look up the customer's account. Put your cursor in the Customer field.

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

If the customer doesn't know his number, you can still find it.

You can look them up by name or telephone number.

With the cursor in the Customer field, start typing the customer's name. Here's a tip! If this is an individual's account, begin the lookup with their last name. Otherwise, use the business name.

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.

Depending on how your system administrator configured your options, the system may display a customer information window. If it does, check to make sure it's the correct account.

Press Enter if this is the correct account, otherwise, choose 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, choose Miscellaneous (Misc) in the Ribbon menu, and select Enter Loyalty Number.

Some customers arrange to have their billing broken down by project or location.

In this situation, a list of job accounts opens automatically.

Ask your customer which job account they want to use for this charge and select that account.

Now you are ready to continue with the transaction.

Item Lookups

With your customer selected, you are ready to post items to the transaction.

If your Point of Sale station has an attached barcode scanner, the easiest way to post the item is through Barcode Scanning.

Make sure your cursor is in the Item field, then scan the item's UPC barcode with the 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.

It's a best practice to scan 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 to the quantity field and enter an amount, then press the Enter key.

When you don't have a scanner or a SKU to enter, SMART lookups give you an alternate method to find items.

You can enter the Manufacturer's part number and select the Manufacturer Lookup icon.

You can enter the UPC or scan a Barcode and press Enter or select the UPC Lookup icon.

And finally, you can enter the Serial number if you have one.

Sometimes, the label is missing, and you don't have any of this 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. Put your cursor in the Description field. Type T-E-E and press Enter.

A list of items that contain TEE in their description displays. Use the arrows to scroll through the items.

If the list is long, narrow the search by adding additional information in the Description field.

When you've located the item you want, press Enter to pull the SKU into the Point of Sale Posting screen. Continue as you normally would 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-&-GLO with spaces, 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, broaden your search, and give you a better chance of finding the item or items you are looking for.

In this example, when I enter MOP with an asterisk, you can see that more results appear. As before, scroll through the results, highlight the item you want, and press Enter.

Another way to lookup items is with QuickFind.

QuickFind is the POS online price book. When posting items on the POS screen, QuickFind makes it easy for you to locate the SKU number for items that are not normally tagged with a SKU or bar code (such as PVC pipe).

The system displays these in a Quick Find grid of either images or text.

Images are selectable links that take you to the product information and text grids display SKU Numbers in columns or rows.

If your system has QuickFind configured, select QFind on the Ribbon. Here's an example.

Your customer has three grid hose containers.

To find this item, first select the item's category, in this case Storage. Then choose the subcategory, which would be Hoses. Then find the item in the grid.

Selecting the SKU brings the information to the posting screen where you can continue posting the item as you normally would.

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