

## 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
- Create
- Recall/Complete
- Delete

### Types

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 and estimate typically guarantees prices for a specified time period.

If a customer agrees to the prices in quantities in the estimate, you can change it to a bid and use the bid to create one or more orders.

Changing the bid into an order gets 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 rain checks 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 will become familiar with the details of each of the saved transactions in future Training On Demand lessons.

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

## Create

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

Special orders, orders, and estimates are the most common types of saved transactions, so if your cursor is in the Customer field, they each have a button on the ribbon menu.

Clicking one of these icons will begin that type of transaction.

Another way to begin a saved transaction is by selecting "Start Transaction" from the ribbon.

This opens a menu that includes layaways and rainchecks as well as orders, special orders, and estimates.

Simply select the type of transaction you wish to begin.

For instance, if we select "Quote", the posting screen looks the same, but notice that estimate appears in the title bar of the screen, and the words "Create quote" appear here at the upper left of screen.

You're now ready to select the customer if you were quoting items from account and begin adding items to the transaction.

Once you're 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.

For estimates there is an additional option not available for other transaction types. It is the option "To print and do not save".

This is useful as an estimate is one that you know you will not need to recall at later date.

if you are creating an order, special order, or a 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 Assign document number and requests acknowledgement. Press Enter.

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

At this point you may be wondering what if I meant to create an estimate but forgot to change the transaction type.

Do I have to reenter everything?

Fortunately, if you meant to create an order or estimate, the answer is "No". You can save an in-process sale transaction as either an order or estimate very easily.

if you started a sale transaction and need to convert it to another estimate, first finish adding your items to your sales transaction.

Then proceed to the total screen when the system is prompting for payment.

Select "Save" from the ribbon menu and a window that opens gives you the option to suspend the transaction or save the transaction as an order or estimate.

Select the type of document you have meant to create and the transaction is converted and saved.

One note on this method: if you save an estimate or order in this manner, point of sale will not print a copy.

To produce a printed copy you must recall the transaction total it and choose the option to print it.

## Recall/Complete

You can use dot lookup if you know the document number or if your system is set up to automatically show you a list of open documents for a specific customer when you enter his account in the point of sale.

Let's take a look at how this works.

There's a reason this method is called a dot lookup. That is 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 d transaction.

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

If you're recalling a document that you've just saved , say to print an additional copy, or because you selected the wrong option in the Finish menu, there's a quick shortcut. Simply enter a dot or period into the customer box and press Enter.

This recalls the last saved document without having entered 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?

Well, fortunately there is a simple way to find a document.

In point of sale if your cursor is not in the customer field, use the customer icon on the ribbon to move it there.

Then in the "Favorites" section of the ribbon, select "Documents".

The POS Document Viewer opens and you can enter any information that you know, such as customer account or document type.

You can also adjust the Through Date to only view transactions that were saved in a certain time frame.

Then click "Refresh" to see a list of documents that 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 available to help you find the documents you were looking for.

You can use the arrow keys to highlight a document and press "Display" to see the transaction details, or simply double click on a document to bring up the same information.

This is helpful making sure you've selected the correct transaction.

Once you're sure that the correct document is highlighted in the viewer, press "Select" or press "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 point of sale viewer for you.

Ask your supervisor if this option is used in your store.

When automatic search is enabled, entering a customer in point of sale who has existing open orders, another name for saved transactions, triggers a message asking if you would like to view these transactions.

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

However, if you answered "Yes", the system automatically filters the documents in the viewer and displays only this customer's documents.

This lets you quickly selected the document or view details.

Finally, you can recall documents by scanning a barcode if your store uses enhanced point of sale forms. Again, you'll need to check with your supervisor to see if this option applies to your store.

Enhanced point of sale forms automatically generate and print the bar code on saved transactions.

If you place the cursor in the Customer field, then scan the barcode, the saved document automatically loads in the 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 in pricing, or change any other information including the transaction header details,

## Delete

Pressing the Totals key brings up the Finish menu. Then you can resave or invoice the transaction.

We'll discuss recalling transactions in a moment.

So, let's talk about how to recall the transaction so that you can save it, edit it, or complete it as an invoice.

There are several ways to find a saved transaction and recall it including dot lookup, the point of sale document viewer, and document barcodes. The method you choose depends on what information you have at the time.

One thing to remember is that if you select "Void transaction" and want to recall document 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 the saved document from the system, you must first recall the document and navigate to the header screen

While in the header screen, there is a "Delete" icon on the ribbon. Selecting "Delete" and confirming that you wish to delete permanently removes a document from the system.

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

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

Deleting document into 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.

The Open Order Report or ROO also has numerous options for functionality and purging expired documents, enlisting open documents by various selection criteria.

Detailed explanations of the various options are available on the Eagle help screen under the topic ROO.

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

Be sure to follow up with the Training On Demand courses covering the specific types of saved transactions to learn more about each type.

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