Saved Transactions Overview

Where you complete sales transactions within a few minutes, you create saved transactions to recall and complete later for invoicing.

On completing this lesson, you should be able to recall the different types of saved transactions, know how to create a saved transaction, recall, and complete it, and how to void or delete them.

Topics

- Types
- Create
- Recall/Complete
- Delete

Types

Types of saved transactions include estimates, bids, orders, special orders, advanced rainchecks, and layaways.

Create estimates (also referred to as quotes) when a customer asks you to quote prices on a list of materials.

The estimate typically guarantees prices for a specified period.

If the customer agrees to the prices and 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 gives flexibility in setting up shipping and invoicing dates.

Special orders are like orders, but they involve merchandise that the store doesn't normally stock.

Advanced rain checks guarantee the price for a promotional item that is out of stock.

A layaway is a saved transaction that allow customers to spread out payments for a purchase.

Create

Creating a saved transaction is like doing a normal sale.

Special orders, orders, and estimates are the most common types of saved transactions. With the cursor in the Customer field each has a button on the ribbon menu.

Choosing any of these icons begins the selected 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.

Select the type of transaction you want.

For example, if we select Quote, the posting screen looks the same.

However, notice that Estimate appears in the title bar, and the words Create Quote appear at the upper left of screen.

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Next, select the customer if you were quoting items from account and begin adding items to the transaction.

When finished, total the transaction as normal.

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

The first two options: Save without printing and Save and print are the most used at this point of the transaction.

For estimates, there is an added choice not available for other transaction types. It is the option: To print and do not save.

This is useful if the 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, the system may prompt you to take a deposit.

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

With the transaction saved, 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.

What if you meant to create an estimate but forgot to change the transaction type?

Do you 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.

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

Then select Total in the ribbon menu.

From the Total screen, select Save from the ribbon menu.

The Save Transaction window then gives you the choice to suspend the transaction or save it as an order or estimate.

Select the type of document you meant to create. The system converts and saves it.

Note, if you save an estimate or order in this manner, point of sale will not print a copy.

To print a copy, you must recall the transaction, total it, and select the option to print it.

Recall/Complete

Use dot lookup to:

recall a record for which you know the document number or

if the system is set up to automatically show you a list of open documents for a specific customer when you enter their account in point of sale.

With dot lookup, enter 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.

Make any needed changes, add more items, reprint, invoice, or resave the order.

If recalling a document that you just saved, perhaps to print a copy, or because you selected the wrong choice in the Finish menu, there's a quick shortcut.

Enter a dot or period in the customer field and press Enter.

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

There's another way to find the document if you don't know the document number.

In Point-of-Sale, put the cursor in the Customer field and select Documents in the Favorites section of the ribbon.

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

Adjust the Through Date to view only those transactions saved within a certain time frame.

Select Refresh to see a list of documents that meet your criteria.

If you don't have information to narrow your search, choose Refresh and the system gives a list of all open documents on the system.

Remember, this is a viewer, with all the functionality of a viewer including sorting and filtering to help find documents.

Some stores set up their point-of-sale systems to automatically search the point-of-sale viewer for you.

Ask your supervisor if your store uses this feature.

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

The default is No. Pressing Enter bypasses this message.

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

Finally, if your store uses enhanced point of sale forms, you can recall documents by scanning a barcode.

Check with your supervisor to see if this feature applies to your store.

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

With the cursor in the Customer field, scan the barcode. The saved document automatically loads in point-of-sale.

This is helpful when working with will-calls where there is a copy of the order attached to the merchandise.

It also helps cut typing errors.

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

Selecting Totals opens the Finish menu to resave or invoice the transaction.

Delete

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 chosen depends on available information.

One thing to remember is when selecting Void transaction to recall the document displayed in point-of-sale, the system will not delete the saved document.

The system discards any changes you made since the document recall and the last-saved document stays in the system.

Voiding a saved transaction is like exiting without saving.

To remove the saved document from the system, first recall it and navigate to the header screen.

In the header screen, select Delete and confirm the action. This permanently removes the document from the system.

Note that if the customer made deposits on an order, they must be refunded from point-of-sale before you can remove that order.

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

Deleting documents in the Viewer is handy because you can use the check boxes to select multiple documents for deletion.

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

The Open Order Report (ROO) (Do not narrate the abbreviation – include in transcript only) also has many options to help purge expired documents.

Refer to online Help for more information on the function and use of the Open Order Report.

As you can see, saved transactions give flexibility to manage your business, and your customers the ability to manage their purchases and accounts.

In this course, we described different types of saved transactions, how to create a saved transaction, recall, and complete it, and how to void or delete them.

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