Security Concepts Options

Option 340

Enter Return to Clerk?

Return to Clerk?

N	The cursor returns to the Item (SKU) field after each transaction.
T	After x seconds the cursor returns to the Clerk field.
Y	The cursor returns to the Clerk field after each transaction.

OK

Cancel

This field determines if the cursor returns to the Clerk field on the Posting screen after each transaction.

N = The cursor returns to the Item (SKU) field after each transaction. The system assumes the clerk who signed on last is still using this terminal.

T = After x seconds, the cursor returns to the Clerk field and clears the field if:

- The cursor is at the Item (SKU) field and no items are posted.

- The cursor is at the end of a order, special order, or estimate and the clerk does not press Clear.

- The cursor is in the Customer header and no items are posted. Requires that Option ID 8401 is set to Yes.

- The cursor is in the Loyalty ID field at the start of transaction.

Y = The cursor returns to the Clerk field after each transaction. At the beginning of each transaction, the clerk must type his or her name (and password, if password security is used).

Notes:
1. Refer to option ID# 5421 "POS timeout (seconds) for automatic return to clerk" to set the number of seconds when using T to timeout.
2. Also see option 340 "Override MIV "Return to Clerk?" setting" that allows you to set some terminals in this store differently.

Kept By Store

This option is also in Eagle function MIV.

Option 340

Enter Override Return To Clerk

Override Return To Clerk

U	Use MIV "Return to Clerk?" setting (MIV option 340)
N	The cursor returns to the Item (SKU) field after each transaction.
T	After x seconds the cursor returns to the Clerk field.
Y	The cursor returns to the Clerk field after each transaction.

OK

Cancel

Use this option to assign a terminal its own setting for the MIV "Return to Clerk?" option which is kept by store.

This field determines if the cursor returns to the Clerk field on the Posting screen after each transaction.

U = Use the store's "Return to Clerk?" setting (see MIV option 340.)

N = The cursor returns to the Item (SKU) field after each transaction. The system assumes the clerk who signed on last is still using this terminal.

T = After x seconds, the cursor returns to the Clerk field and clears the field if:

- The cursor is at the Item (SKU) field and no items are posted.

- The cursor is at the end of a order, special order, or estimate and the clerk does not press Clear.

- The cursor is in the Customer header and no items are posted. Requires that Option ID 8401 is set to Yes.

- The cursor is in the Loyalty ID field at the start of transaction.

Y = The cursor returns to the Clerk field after each transaction. At the beginning of each transaction, the clerk must type his or her name (and password, if password security is used).

Note: Refer to option ID# 5421 "POS timeout (seconds) for automatic return to clerk" to set the number of seconds when using T to timeout.

Kept By Terminal

Option 5003

Enter Cash Drw Opn Ret to Clrk

Cash Drw Opn Ret to Clrk

Y	Yes
N	No

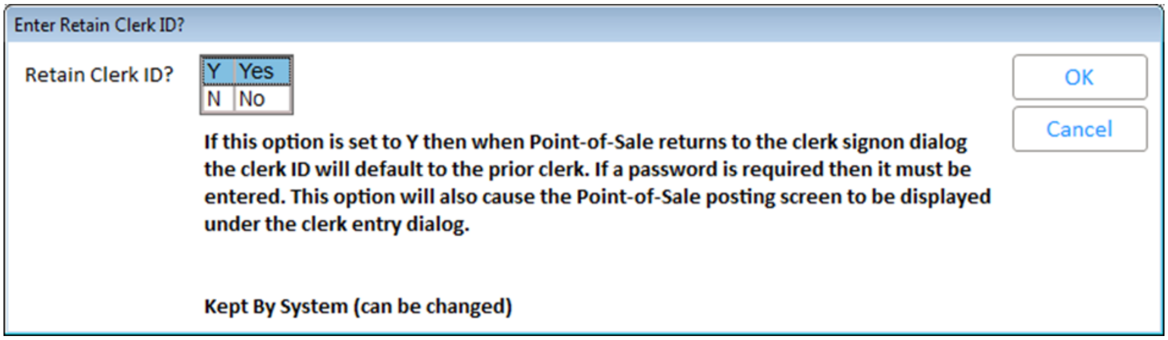
OK

Cancel

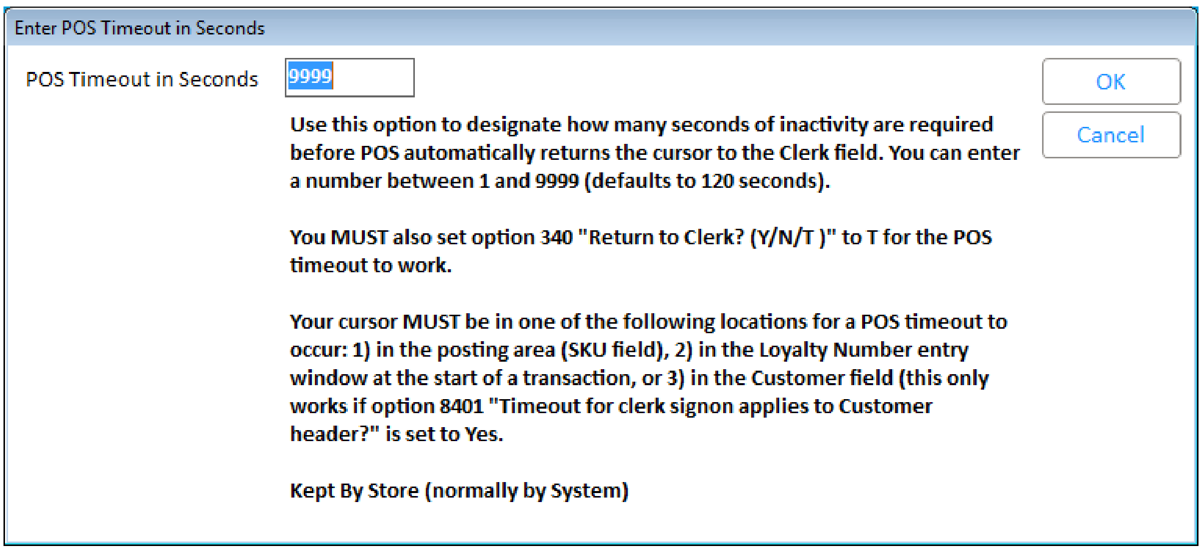
Set to Yes if you want to go to the clerk signon screen after opening the cash drawer. Otherwise set to No.

Kept By System (can be changed)

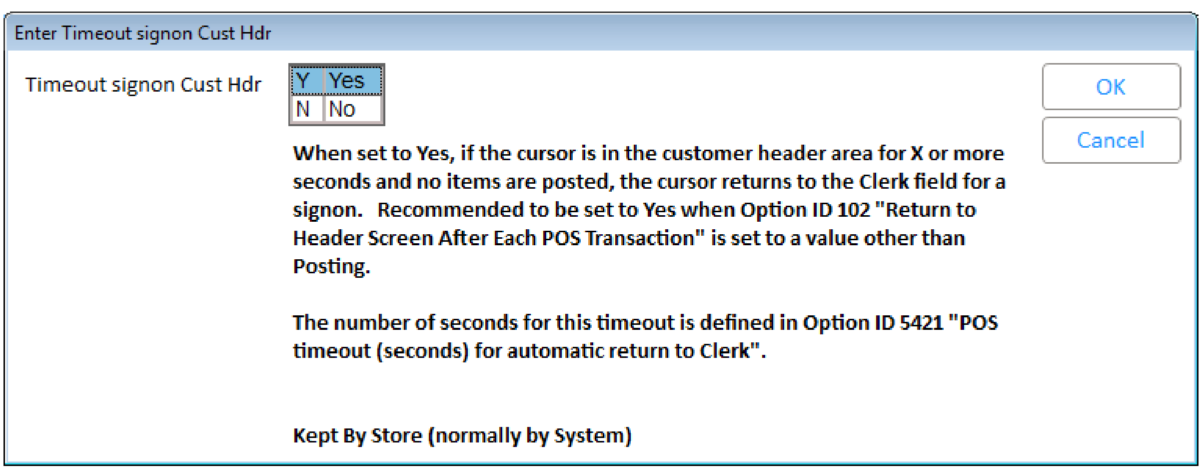
Option 5004



Option 5421



Option 8401



To begin, we'll review Order Monitor's role in the sales processing cycle.

Then we'll examine the Order Monitor search filters including viewing and using the results.

Sales Cycle and Order Monitor

The sales cycle begins with entering an order and ends with the creation of an invoice.

The steps between the start and finish, including tracking the order, marking it Picked, and then Picked up or Delivered, occur within Order Monitor.

In many cases, the invoicing might be done from within Order Monitor as well.

The Order Monitor option is on the Home tab in the Dispatch group.

The window has 3 distinct areas.

Use the fields in this section to set the search filters for displaying orders.

BisTrack shows the orders that match the settings in the Results area. You can organize the data a number of ways, including grouping orders by any of the column headings. Here, the Status column has been set to group orders.

The system includes tool bar options to use with the displayed orders at the top of the window.

Sales, Yard, Warehouse, Dispatch, and Back Office staff all use the Order Monitor.

To accommodate all of these roles, the system provides several filter settings that help you find orders based on the work the requirements.

The Filter choices are closely related to an order's status and organized within categories.

You can choose a category before selecting the status to view.

When you select Stock, the system displays a subset of the filters specific to finding orders that require filling and preparation for pick up or delivery.

The Financial setting has filters to locate orders for payment, invoicing, or with credit control issues.

For any of the filters, you can select whether to look for Cash and Credit Sales, Cash only, or Credit only.

You can skip using the Filter option by clicking the drop down.

The same filters appear grouped by Stock, Financial, etc. Use the scroll bar to move up or down the list to find the one you want to use.

The All Orders For Processing setting finds any order regardless of its status.

You can search for orders based on Dates.

Clicking the drop down shows a number of time periods when filtering by date.

You can use the order's Required or Created date for the search.

Selecting Custom Dates requires you to enter a From and to date.

You can enter the dates or select them from the Date Picker.

If your business has multiple branches, you can change the branch default to view specific branches or all branches.

The system provides two Find dialog boxes that you can use to enter the specific order Number or search text from the order.

You can enter multiple order Numbers by separating each entry with a comma.

Search text can include a partial customer name, address, or contact.

Click the Go button to perform the search.

Viewing and Using Search Results

The search displays the orders matching the filter settings.

The system displays the number found in the bottom left corner.

With the results grouped by Date and Status, the system displays one line for each Date Required and each order Status found, and the number of records.

Clicking the plus icon beside a Date and then Status name expands the list to show the orders in that group.

The records correspond to the Filter, Date Required, and Find text box settings.

Now you can perform actions with the orders listed.

Start by selecting the order, and then click a button from the toolbar.

Alternatively, you can select an action from the right-click menu.

The pop-up menu has the same options as the toolbar.

You can perform certain actions on multiple orders in one step using the Ctrl and click or Shift and click key and mouse combination.

In this example, you choose the entire list of orders for Picking by clicking the first one in the list and then Shift and click on the last.

To remove any from the list, use Ctrl and click.

With the range of orders selected, choose an option from the toolbar or right-click menu and perform the action.

You can use any of BisTrack’s options for customizing the view.

This includes sorting the list by clicking a column heading.

The first click sorts in ascending order, the second in descending.

The arrow adjacent to the column name indicates the current sort order.

You can also set a Group By using any of the column headings.

You can use multiple levels of grouping as shown here.

To remove a Group By column, drag and drop it back to its column.

Use the scroll bar at the bottom of the window to view the columns beyond the current display.

Move the bar to the right and left to see the information available for each record.

You can also open an order by double-clicking it.

Use Order Monitor to find and update orders that are moving through the sales cycle.

In this course, we introduced you to the Order Monitor window and search filters. You should now be comfortable setting the filters and working with the displayed results.

About Epicor

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