Counter Sales Overview

The Counter Sales dashboard provides POS clerks with the tools they need to effectively work with both cash and charge customers.

In this course, you will be introduced to the Counter Sales Standard Dashboard.
Then we will show you how to use the options for cash orders, other documents and parked orders.

Select a topic and we'll get started.

Topics

- Standard Dashboard

- Cash Sales

- Other Documents

- Parked Orders

Standard Dashboard

The Counter Sales Standard Dashboard is a simplified list of options specific to that environment.

This is the main list of options displayed when a POS Clerk logs into BisTrack.

The dashboard options used most often such as Cash Sale, Find Cash Order and Find Order have a Function key assigned.

This provides an alternative way of selecting the option without having to move your hand away from the keyboard.

Many of the dashboard selections operate exactly the same when accessed from the ribbon bar.

For example, pressing F1 opens the New Order window.

The display and sales entry steps are the same regardless of which method you use to begin.

Cash Sales

A number of dashboard selections are specific to cash sale transactions.

To enter a cash sale for a generic customer, press the F5 key.

The New Sales Order window opens with the default cash customer automatically selected.

The Cash Sale box is enabled and the cursor is in the entry field ready for you to scan or enter the product that you're selling.

The dashboard has an option specifically for finding cash orders.

Use the F3 key to access it.

This is a modified version of the Find Documents window.

It has a limited number of methods available to locate cash orders.

The default is by Document Number, Reference, Contact name, or Address.

You can enter text from any of those sales order fields to search.

The matching cash orders are listed in the window.

You can select one by pressing the Function key indicated on the line.

Several processing buttons appear at the bottom of the window.

After selecting an order, you can enter a payment for it, open it to view the details, copy it to a create a new order, print the document, or mark it as picked up.

Use the Up and Down options to scroll through the list.

You can select all the buttons using the key indicated in the upper left corner.

Selecting Close, returns you to the dashboard.

Entering payments on existing orders is a common counter sales activity.

Press F11 or select the Orders for Payment button.

Without entering a search filter, the window automatically displays all orders awaiting payment.

You can narrow the search using the Look in and Find settings.

Once found, highlight the order from the list.

Selecting the P key opens the Deposits and Payments window and you can process the customer's payment.

Other Documents

It's not uncommon for counter sales clerks to find and process other types of sale documents.

From the dashboard, select F4 to open the Find Order window.

The Find Orders window has two Look in filters.

The first is for selecting the type of.

Next specify the kind of search text you will enter.

You can also enter customer contacts as search text when using Number, Ref, or Customer.

Enter the text for the search.

Choose a document from the list.

The same processing options are available as the Find Cash Orders window.

Now change the Look in to Quotes and

enter the Quote number.

Notice that different buttons appear which are specific to Quotes. Accept and Reject replaces the Payment button.

To return to the Dashboard, press the Esc key.

Parked Orders

When you prepare a cash order at a sales desk that does not have a cash drawer or for products that the customer picks up from the yard, you can Park the order; temporarily suspending it.

Once the customer has the products, you can retrieve the Parked order at the cash counter to complete the sale.

From the dashboard, press F12.

Enter the order number in the Find field.

To complete the order, select it, then press F9 to Open.

Update the order details if needed.

When done, select the Complete button to process the payment and finish the sale.

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