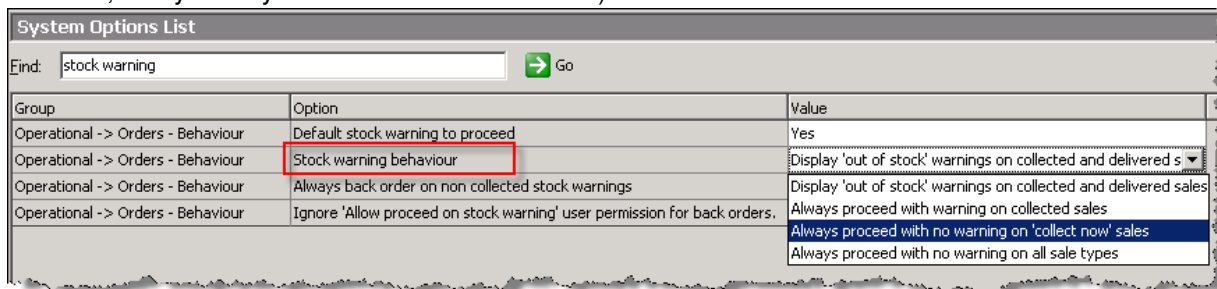


POS performance speed and the ability of clerks and sales team members to quickly enter and complete orders can be maximized when the following system options and bisTrack processing options are set.

System options

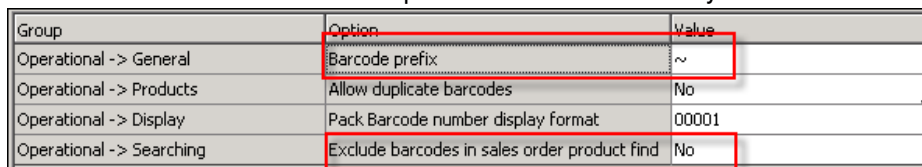
Go to System Manager → Tools → System Options. Find the following system options and confirm or set them as noted. (To find them quickly, click List, type key words from the option name, and click Go.)

- “Default order lines to negotiation tab”: Set to Yes. This will display the price negotiation tab directly upon selection of a product when creating an order (rather than going first to the general tab, entering the quantity, then clicking to the negotiation tab).
- “Skip confirmation screen at sales order completion”: Set to Yes. This will eliminate the confirmation screen when a sales order is completed.
- “Display order number on sales order completion”: Set to No. This will prevent the display of the sales order number dialogue box when an order is completed, saved, or parked, so the user will be returned directly to the sales taskpad or counter sales start window without having to click “OK.”
- “Stock warning behavior”: Select an option that gives you “out of stock” warnings only when necessary, given your business processes. (Most customers can turn off stock warnings for collect now orders, for instance, and you may be able to turn them all off.)



Group	Option	Value
Operational -> Orders - Behaviour	Default stock warning to proceed	Yes
Operational -> Orders - Behaviour	Stock warning behaviour	Display 'out of stock' warnings on collected and delivered s
Operational -> Orders - Behaviour	Always back order on non collected stock warnings	Display 'out of stock' warnings on collected and delivered sales
Operational -> Orders - Behaviour	Ignore 'Allow proceed on stock warning' user permission for back orders.	Always proceed with warning on collected sales
		Always proceed with no warning on 'collect now' sales
		Always proceed with no warning on all sale types

- “Document release print delay”: Set to zero to eliminate any seconds of delay between release and printing.
- “Show change information during document printing”: Set to Yes to enable cashiers to handle change while documents are printing, rather than waiting until after printing is complete.
- “Default customer search on sales orders to address”: Set to Yes.
- “Default merge products on order”: Leave at the system default.
- “Default merge products on Counter Sales quick add”: Leave at the system default.
- “Barcode prefix”: Set up your scanners to assign a prefix (e.g., ~ or ^) to barcodes, then enter the prefix in this option so a barcode scan will alert bisTrack that a scanned entry is a barcode. This speeds product search and selection. When using quick entry options, bisTrack will add a line and select the product even if scanning while the cursor is in the Qty or Price field. (This applies only to quick entry, not fields in order line properties or any other window.)
- “Exclude barcodes in sales order product find.” Set to No if you use the barcode prefix option above.

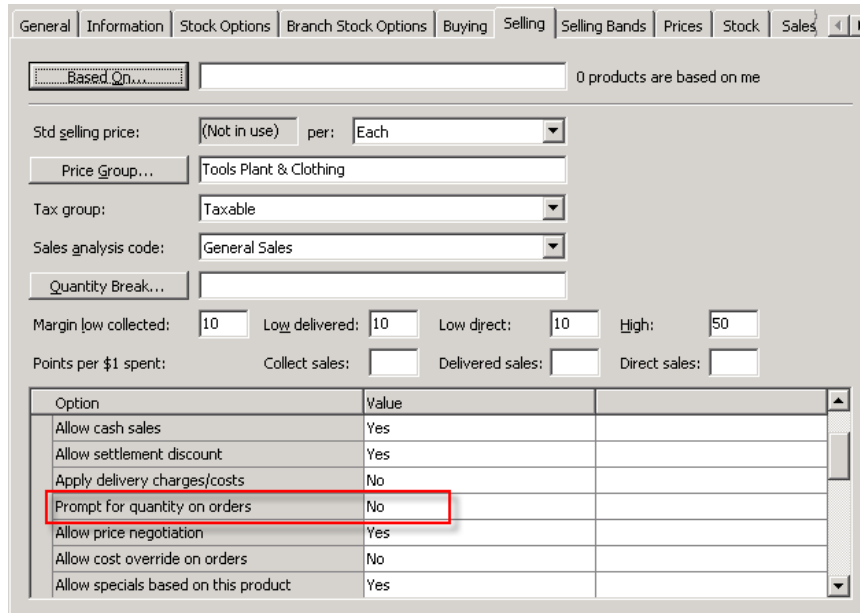


Group	Option	Value
Operational -> General	Barcode prefix	~
Operational -> Products	Allow duplicate barcodes	No
Operational -> Display	Pack Barcode number display format	00001
Operational -> Searching	Exclude barcodes in sales order product find	No

Click OK to save your changes and close the System Options window.

Processing and handling options

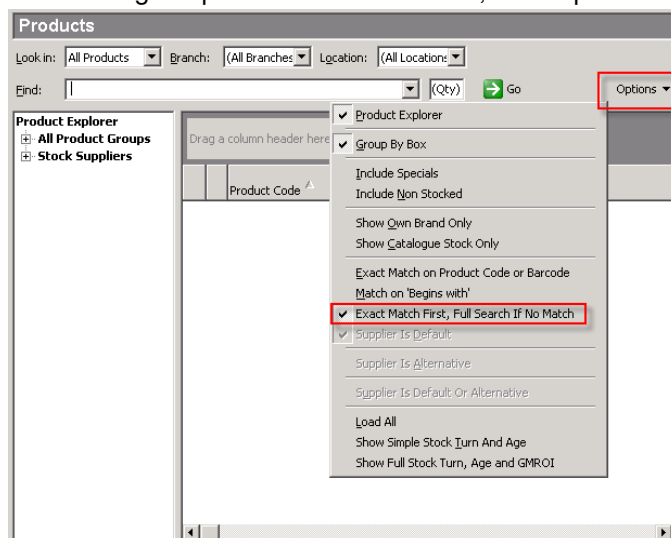
- When setting up products, set “prompt for quantity on orders” to “No” for most products. (System Manager → Products → Products. Open Product Properties and click the Selling tab.)



Option	Value
Allow cash sales	Yes
Allow settlement discount	Yes
Apply delivery charges/costs	No
Prompt for quantity on orders	No
Allow price negotiation	Yes
Allow cost override on orders	No
Allow specials based on this product	Yes

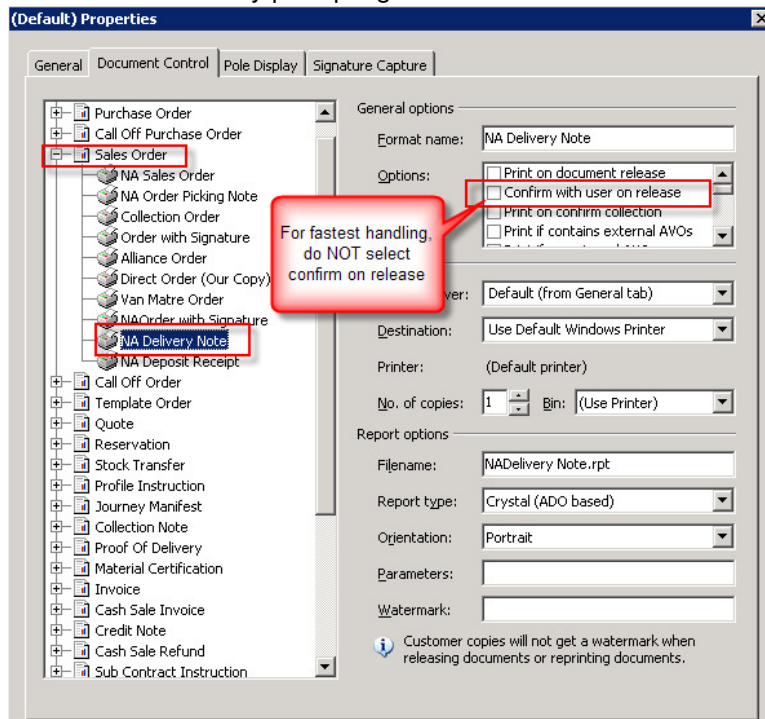
As a result, the selected product, when found (or when an exact match is entered in the Find Products field) will be automatically added to the order with a quantity of 1, skipping Line Properties completely. (The user can always open Line Properties to adjust pricing or other details as needed.)

- When using the product search function, click Options and select Exact Match First, Full Search if No Match



As a result, if users type the product code or other search text into the Find field and press Enter, the exact-matching product will be selected without having to choose it from among similar options (e.g., 58, 58osb, and 3458) on the Find products screen.

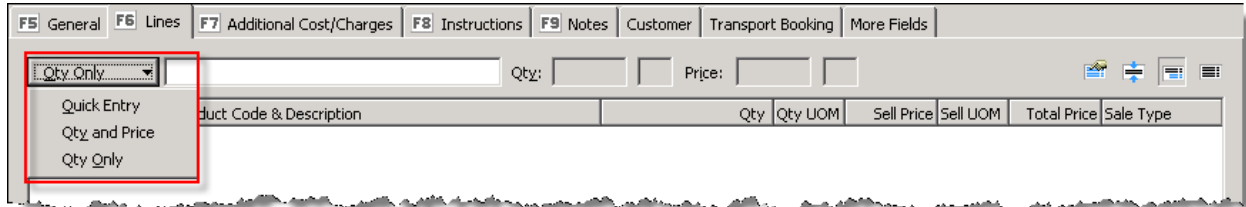
- When setting up document control, think carefully about choosing to prompt the user for confirmation for a delivery ticket. In many cases, it is more efficient to manually reprint when needed than to have every transaction slowed by prompting.



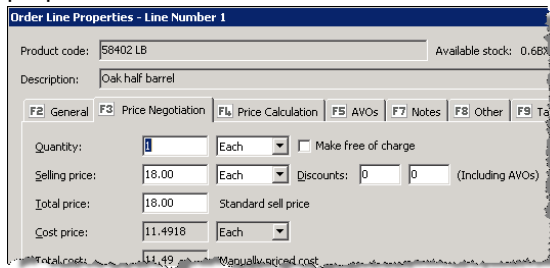
- Make sure that documents that print during checkout (e.g., sales invoices or electronic payment receipts) use Crystal Report files saved *without* an explicit printer reference in the .rpt file.
- Keep Crystal Reports document file sizes as small as possible (e.g., minimize large graphics, etc.)
- Set up your document control to print to receipt printers when possible; since they generally have no warm-up time, they'll print faster than a laser printer might.
- If you are using the Ingenico integrated card processing/signature capture device, make sure that software installed for the device does not use a terminal timeout setting of more than 30 seconds (the usual default). This setting is found on the Protobase\devtrans server in the IngenicoRbaCustomPrompts.txt file under the \devtrans\prompts folder (which is usually installed and setup by your Elavon representative).
- Use bisTrack Report Server for document offloading.
- Recognize that good data comes at a price when you are considering whether orders should require information such as customer reference numbers, contact information on collect now or delivered orders, etc. Enabling prompts and warnings about missing data, such as addresses or dates not set on orders, necessarily adds time to order entry.


Quick order entry and edit options

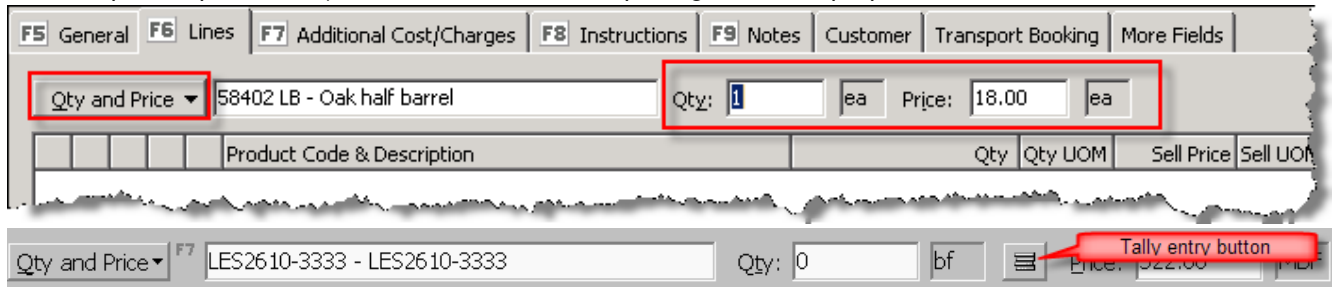
- Train employees to complete order entry with keystrokes (including F keys and Alt-key combinations) rather than the mouse. A typical counter sales order with product scanning can be completed in five keystrokes. Refer to the one-page references called bisTrack Keyboard Order Entry and bisTrack Keyboard Shortcuts.
- Take advantage of the options for item, quantity, and price quick entry. Once a user selects their preferred method, it will be saved as a user preference.



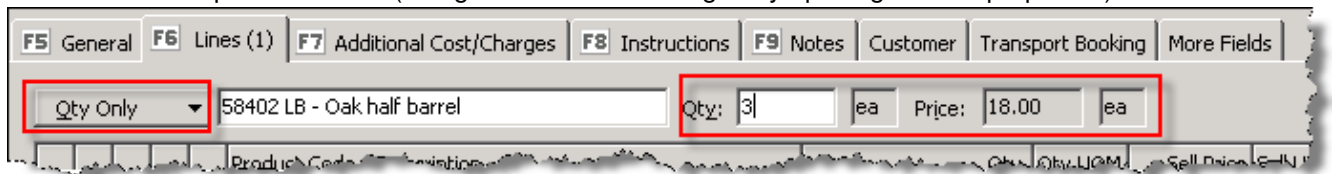
The default option is Quick Entry: Enter (or scan) the product SKU and press Enter to open the order line properties screen.



For the Quantity and Price option: enter or scan the SKU and press enter, then immediately enters quantity and price. (Or click  to enter a tally.) Press Enter again (or scan a new barcode at any time, if the barcode prefix option is set) to add the line without opening order line properties.



For the Quantity only option: after entering or scanning the SKU, enter a quantity (or tally) and press Enter to add the line. (Or scan a new barcode, if the barcode prefix option is set up in system options). The price defaults from the product record (though it can still be changed by opening the line properties).



Using either the Qty and Price or Qty only options, you can press F2 (in Operations) or F8 (in Counter Sales) to enter the selected (last added) line. Also see the grid entry option below.

Quick entry option notes:

- For cost-controlled items and any product set to prompt for quantity, the line properties window will still open using any of the above options.
 - Kits and special order items still follow their usual entry procedures (including the selection of kit options, etc.)
 - Tally items with child prices selected on the tally window will automatically load the line with those prices once the tally is selected, even in the Qty and Price option.
- In Operations, use the order edit button in the upper right of the Lines tab to quickly edit multiple lines already on an order. (Press Enter or arrow keys to move between fields. Press F2 on any line to open order line properties. This edit mode does not apply to cost-controlled items and will not display stock or backorder warnings.)

