Setting Up and Maintaining Quick Find

Quick Find is a POS feature that helps you lookup products that don't have barcodes, price stickers, or that are too big to move to the register.

Objectives

- Setting Up Quick Find
- Maintaining Quick Find
- Using Quick Find

Setting Up Quick Find

The Quick Find layout contains groups and those groups contain individual items. Let's start by creating a Layout.

From the main menu, select Sales. Click Setup and then choose Quick Find.

Click the Add button to create a new layout.

Enter a name and description for the layout.

If you have multiple stores, select the appropriate one.

Expand this arrow to view the existing registers. Now, select one.

Note, you can only assign one layout to each register.

Click Continue to save the new layout and replace the existing one. Click Save.

To further organize this layout, you can add groups, subgroups, and individual items.

We recommend adding all of the groups and sub-groups before adding the individual items. Click the Add Group button.

Enter the name of the group. You can select a color to help distinguish it from another group.

To set an image, select Change Image. Browse for an image file and select Open to upload it.

Tap the Save button.

Now, if you want to create sub-groups within a group, select the parentgroup.

Click the Add Group button. Give it a name, assign a color, and upload an image. Tap Save to add the sub-group. Repeat the above steps to add more groups and sub-groups to the layout.

To add items, select the Add Item button. Use the search bar or the drop-down menus to locate the item.

Check the boxes next to each item to add them to the subgroup. Then select Add or use the F4 function key to proceed.

The items are added to the group.

Product images are managed from the Products page using the Actions menu. Choose Manage Images to make sure your quick find items display a picture at point of sale.

Select the Save button to save the items.

Click this button to view the groups, subgroups, and items in a layout according to the listed preferences.

Maintaining Quick Find

As your inventory changes, update your Quick Find by editing or deleting layouts, groups, or items.

From the main menu, select Sales. Click Setup and then choose Quick Find.

To edit a layout, enter the Layout Name or Description in the search field.

Click the Search button and scroll through the results.

Check the box next to the layout name and click the Edit button.

Make any necessary changes and tap Save. To delete a layout that is no longer in use, select Actions and then click Delete Layout**.** Select Yes to delete the layout.

To delete a group, select it and tap the Delete Group button. Select Yes to confirm**.** Click the Save button to save the changes.

Now, if you want to delete an item, check this checkbox on the thumbnail. Use the Select All box to delete all the items. Click the Delete Items button. Remember to save the changes.

Using Quick Find in POS

Your system administrator can enable the option to ‘Start POS with Quick Find open’.

This can be found on the Settings and Licenes form.

Dependant on that setting, you may need to expand the panel in Point of Sale. Click the Quick Find tab to view the grid containing the groups.

Select the desired group. Now, you’ll see the sub-groups.

Select the appropriate sub-group and then choose an item.

Set the quantity here and tap Save**.** Repeat the above steps to add more products.

Select Make Payment to proceed with the transaction.

Recap

With some initial setup, Quick Find makes the checkout process quicker, easier, and hastle-free.

About Epicor

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