

Sales Screen  
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## SALES SCREEN

The diagram illustrates the layout of the StockBoy Sales Screen. It is divided into two main sections. The top section is a login area containing the text "PLEASE LOGON | TILL NAME |" followed by a horizontal line with a right-pointing arrow. The bottom section is a larger area for transactions, featuring a horizontal bar at the top, a grid of vertical lines for data entry, and a small box at the bottom right.

## INTRODUCTION

The sales screen (shown above) is the heart of the point of sale section of the **StockBoy** Retail Management System.

The sales screen is used to 'ring up' all retail transactions including standard sales, refunds, exchanges, layaways, special orders, and charge sales and payments. Even more functions are available from the sales screen; they include time clock entry, inventory query, warranty code lookup, preferred customer maintenance, and many more managerial-type functions.

*NOTE: Many of these functions are completely optional. They make be activated or de-activated by your system manager.*

The sales screen represents a series of software programs and procedures that generate information that is automatically passed to the General Ledger, Inventory Control System, and other **StockBoy** sections.

The sales screen (and associated procedures) serves as the input mechanism for a wide variety of functions, including end of day till reconciliation, accounts receivable, layaways, special orders, time clocks, commissions, general ledger postings, and a host of managerial reports that evaluate dollars per ticket, tickets per hour, tickets per day, sales per hour, etc.

There's an old (and well-proven) computer term called GIGO ... garbage in, garbage out! If the input is bad, the output will be bad. That's why the mastering of the sales screen is perhaps the most important task facing any company installing the **StockBoy** Retail Management System.

To make the task easy as possible, the sales screen is designed to look and feel like a paper invoice, showing the rows and columns in a similar fashion to hand writing a customer receipt. Specialized keys on the typewriter-style keyboard are used to make the sales process easy and quick, much like the buttons on a cash register.

Between the use of specialized 'function' keys and the familiarity of invoice display, the use of the sales screen to ring up a sale does not require a great deal of 'getting used to.' Most first time users can ring up a sale with less than a half hour's initial instruction!

**StockBoy** is noted for its 'Retail Flow.' The step by step process of making a sale via the computer follows what happens in the 'real world' in the same way in the same order. For example, many other point of sale systems force your customer to decide whether to pay with cash or charge at the beginning of the sale; the customer determines method of payment at the end of the sale with **StockBoy**.

Many 'rookies' feel that the use of the sales screen appears to take longer than using a standard cash register ... the answer is 'yes' and 'no.' Because one of the major purposes of **StockBoy** is to provide full unit inventory control for management, more information must be captured at the point of sale. So 'yes' there are some extra pieces of information that need to be input that are not required with a standard cash register. But when compared to other electronic cash registers that trap similar amounts of data, we've found that reasonably experienced **StockBoy** operators are often faster, seldom slower.

Plus, **StockBoy** is designed to help minimize the familiar and oft-dreaded check out 'boogens' that *REALLY* slow things down! **StockBoy** generates its own price tags ... it will be nearly impossible to call up a product and not know what the price is! Products without price tags are less of a problem by using **StockBoy's** inventory lookup feature. Customer requests for exchanges, charge account balances, discounts, gift certificate redemption, layaway information, etc are all reduced to NO PROBLEM at the point of sale.

## DEFINITIONS

**SKU:** Pronounced 'skew' and stands for Store Keeping Unit or Stock Keeping Unit. **StockBoy** uses the term SKU to accommodate the majority of retailers who use the same term. Technically, **StockBoy's** SKU's are more like PLU's ... Price Look-Up's (a term used by many sophisticated electronic cash registers). Regardless of the name, SKU means the product code that is used by the cashiers to identify the merchandise being sold. Each particular type of merchandise will generally have a common SKU; large items that are sold by serial number will most likely have the same SKU for all the items, and will be handled in a special way to account for the serial number.

The SKU and the quantity sold are the two data items that are most commonly input during the sales process, the price is automatically called up for you.

**PROMPT:** A PROMPT is simply a question that the computer is asking you. Sometimes it is a warning message or a piece of important information, but generally a prompt is a single line of text followed by the CURSOR AREA. The computer 'stops' at all prompts and waits for your answer from the keyboard.

**CURSOR AREA:** The CURSOR AREA is the reverse video area following a prompt. The CURSOR is the little blinking underline character that appears on the screen to indicate where your typing will appear. Without the cursor you would not know where your input would be displayed on the screen.

Reverse Video is exactly what it sounds like. If your screen uses amber (yellow) letters on a black background, reverse video is black letters on a yellow background. All input to the **StockBoy** system appears in reverse video to help separate your answers in the CURSOR AREA from the prompts and other screen displays.

On the sales screen, the CURSOR AREA will be displayed in many positions on the screen, and in the main body of the sales ticket there will be no prompt in front of the CURSOR AREA.

The CURSOR AREA may be already filled with a DEFAULT ANSWER, the most common response expected. If the default is the answer you wish to choose, just press the <ENTER> key and the system accept the default as though you had typed it in.

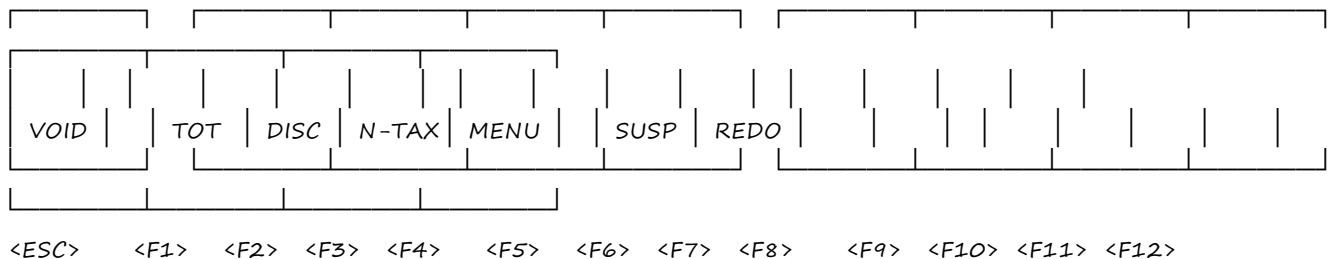
If you do not wish to use the default answer, simply type in another answer. When you press the first keystroke of your new answer, the default answer will disappear from the CURSOR AREA.

To let the computer know when you have finished answering the prompt, press the <ENTER> key .. otherwise the system will wait forever for you to complete the input! The <RETURN> key on some keyboards is identical to the <ENTER> key and the terms may be used interchangeably. Many keyboards have two <ENTER> keys; both work the same.

*NOTE: On prompts that seek a one character answer (like a "Y" or a "N"), the **StockBoy** system can be optionally set to require the <ENTER> key to be used, or it can be set to accept your one character input without pressing the <ENTER> key. Not requiring the <ENTER> key can save lots of keystrokes during a sale, but it may cause confusion during the initial training. See your System Manager.*

## FUNCTION KEYS

There are seven special keys you will want to memorize sooner or later. They are the <ESC>, <F1>, <F2> through <F6> keys. (Function keys <F11> and <F12> are never used, and most systems will not be using <F7> through <F10>) On most sales station terminals you will find these keys along the very top.



Here is a brief description of each key; more details will follow later:

<ESC> The ESCAPE key (pressed twice) will completely VOID any ticket, opens the cash drawer, and prepares your screen for the next ticket. It will void a sale anytime it is pressed BEFORE you go through the print cycle of the ticket. After that point you would need to refund the ticket to cancel it.

<F1> TOTAL key says that you are finished adding line items to this sales receipt. It will take you out of the product area and total the ticket. The <F1> key will cause the ticket to be taxed and totalled, and tells the system to go from the product section of the sales screen to the Method of Payment section.

<F2> DISCount key will apply discounts. **StockBoy** (and you) can handle line item percentage discounts as well as total ticket discounts using either percentages or dollar figures.

<F3> N-TAX exempt key can be used to mark a single item, or the whole ticket, as SALES TAX EXEMPT. Press this key anywhere on the line you want to make tax exempt. This key is a TOGGLE. Press it once to exempt, press it again to un-exempt, press it again to exempt, etc.

<F4> MENU can only be accessed when the screen is at the Salesperson ID Prompt. It will bring up the SALES SERVICES MENU. This is a list of 12 other functions available from the Sales Screen; just press the letter corresponding to the function you want to execute.

<F5> SUSPend will 'Suspend' the ticket in progress if the cursor is inside the "Product Section" of the ticket. You 'Recall' a previously Suspended ticket by pressing <F5> at the Salesperson's ID prompt. You will be asked which salesperson suspended the ticket, then the ticket will reappear on the screen. (Each Salesperson may have ONLY one ticket suspended at a time.)

<F6> REDO lets you back into the product area from the MOP or Address stages. Use this when the customer decides he needs an extra item, or wants to change his mind. It can also be used in the Product Section to erase a line from the ticket, so you can put in a different item.

<F7> Optionally allows certain Headquarters system to input new SKU's --- all satellite stores do not have this feature.

through <F12> are not currently used in the **StockBoy** sales screen system.

## SALES SCREEN SECTIONS

5 NAME/ ADDRESS SECTION:				
1 Salesperson/CASHIER ID SECTION:				
2 PRODUCT SECTION:				
SKU #	Description Area	3 Quantity	Unit Price & Ea	Status
4 METHOD-OF-PAYMENT SECTION:				
			TOTALS	

The numbers on the above screen display representation, do NOT appear on the actual sales screen. They represent the order in which data will be input.

These sections will become very familiar to you in a short time. When you are in the product area of the sales screen, the CURSOR AREA will jump from column to column automatically. There are no prompts in this section; when the CURSOR AREA is in the SKU column, you know to type in a SKU, when the CURSOR AREA moves to the quantity column, you'll type in the quantity.

The description, price each, and status columns are displayed for you automatically; it is not a common occurrence to enter data in these areas so the CURSOR AREA jumps over them during the course of the sale.

However, the price can be changed by the sales screen operator. The use of the four arrow keys on your keyboard can control the movement of the CURSOR AREA when you wish to make changes on the screen.

The Method of Payment section will always show a prompt and request your input.

The sales screen does NOT show an extended total per line on the screen. The running sub-total is shown in the lower right hand corner, and, of course, the printed receipt will show all line extensions.

#### OVERVIEW: MAKING A SALE - SEQUENTIAL STEPS

1. LOGON with a Till Name: This procedure does NOT have to be performed on every sale! A Till Name is associated with every physical money tray. Anytime a money tray is inserted into a cash drawer, the system needs to be 'told' the name of the till. **StockBoy** tracks all cash control information by Till Name.
2. Sign in with a salesperson code (maximum of three characters plus an optional single character password assigned by your System Supervisor). If Cashier Tracking is activated by your System Manager, you will have to sign in with a three character Cashier Code also.
3. Input the SKU number for the product being purchased, followed by the quantity. Repeat this procedure until all products being sold are on the screen.
4. Input any line item discounts or line item tax exemptions.
5. Total the ticket using the <F1> key, announce the total to the customer.
6. Input any total ticket discounts or total ticket tax exemptions. (includes tax exempt number).
7. Ask the customer for his/her method(s) of payment ... i.e. 'Will that be cash, check, or charge?'. Input the appropriate method(s) of payment and their amounts.
8. Optionally enter Name/Address information at the top of the screen.
9. The amount of change appears on the screen. All that remains is to count and deliver the change, bag the merchandise, tear off the customer's receipt, and thank them for shopping at your place!

This is the basic flow of every ticket! Since most sales transactions do not involve line item or total tickets discounts and/or tax exemptions, your sales process is quite simple: 1) type in your salesperson's code, 2) enter the SKU's and quantities, and 3) enter the method(s) of payment.

The <F1> key is used to transfer control of the sales screen from the Product Section to the Method of Payment section, and from the MOP Section to the Name/Address Section, and from the Name/Address Section to the ticket printing. In other words, the <F1> key moves the flow of the sales screen forward in order described above.

In simple terms, the <F6> key moves the flow backwards. If you are in the MOP section, and need to make a change in the product section, press <F6>.

Once the ticket is printed it is finalized. It cannot be adjusted or voided. To make corrections, you will have to input a new ticket to 'back out' or to correct an earlier ticket that has been printed. If the ticket hasn't printed you can make any and all changes (including <ESC> <ESC> to void the whole ticket).

#### MAKING A SALES TICKET



### LOGON with Till Name

Pronounced 'log on' ... computer-people consider it all one word. Same goes for 'LOGOFF'. Each physical workstation that will be used to ring up sales needs to LOGON with a valid Till Name to enter into the sales screen system. Till Names are selected and entered by your System Manager. Each Till Name should ideally represent one money tray insert. The computer will track the overages, shortages, sales, etc, by Till Name.

Some common till names are 'TILL1', 'TILL2', 'DRAWER1', 'SANDRA', etc. If one cashier will be working one till drawer, it is common for the name of the Till to be that person's name. It is important to LOGON with the right till name; using an incorrect name can really mess up the end of day cash control reconciliation.

The Till Name is entered at the PLEASE LOGON prompt. Till Names may also have a password to help prevent unauthorized use. The password is controlled by your System Manager. When you enter a password, the letters you type are NOT displayed on the screen; instead, asterisks "\*" are displayed to prevent someone else from 'looking over your shoulder.'

Once the sales terminal is Logged On, all activity on that machine will be stored under the Till Name, until the terminal is logged off. Generally, only one LOGON is therefore required during any one business day (subject to a power failure or the changing of the money tray insert in the middle of the business day).

*NOTE - A special Till Logon Name, PRACTICE, is provided in the system for Training purposes. All tickets rung up under till name PRACTICE will have the ticket number 0000000 assigned to them. This will prevent the PRACTICE till from duplicating a ticket number that might be used with a standard active till. Remember that any sale under the PRACTICE till will NOT update the ticket count, deplete inventory, salesperson's commissions, End of Day posting summary, sales summary, or write any other permanent file information WITH THE FOLLOWING EXCEPTIONS: Layaway Master files may be created, A/R customers may be created, and Special Order tickets may be created, but no payments will be recorded nor inventory deleted. The PRACTICE TILL will never be included in any cash control or accounting data.*

### INPUT SALESPERSON/CASHIER CODE

The ID (identification) code may be up to three characters long and your code will be assigned to you by the System Manager. Your manager may also assign a single character password that must be keyed in along with your code. for example, if your ID code is 'AAA' and your password is '2', you'll type in 'AAA2'. If Cashier Tracking is activated (by the System Manager), the first prompt will be to enter the Cashier Code; otherwise a four character blank CURSOR AREA will appear on the sales screen near the upper left hand corner.

THERE IS NO QUESTION OR PROMPT THAT APPEARS ON THE SCREEN! Only trained operators know what to do here ... this reduces the possibility that a customer will walk up to your sales station and attempt to 'play Pac Man.'

Type in your Salesperson ID Code (and optional password) then press <ENTER>. Note that your typing only displays "\*" characters on the screen ... this is designed to eliminate the possibility that someone is watching which code letters you're inputting. THIS STARTS THE SALES TICKET. The screen will now show the exact time/date you started the ticket and the next available ticket number will be assigned by the computer. The System Manager may activate a special feature that allows the cashiers to input the ticket numbers ... if so, you will key in the ticket number now.

Ticket numbers are generally seven digits long and cannot be duplicated. The upper left hand corner of the screen is reserved for the name and address of the customer for certain options such as capturing Preferred

CASH SALE  
HOMETOWN, ANYSTATE USA 30018  
09/28/95 1000001 Line 1 11:12 am.

The CURSOR AREA automatically goes to the first row of the ticket, into the left column which is the SKU number position, and waits. The blinking cursor appears at the left edge of the CURSOR AREA. You are now in the Product Section of the ticket.

If you key in a SKU that does not exist, the terminal will sound a 'beep' and keep the CURSOR AREA in the same place.

These inventory comments will appear in the lower left corner anytime the CURSOR AREA is positioned on the SKU's line ... it can be in any column. If the SKU has no inventory comment, nothing will be displayed.

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09/28/95 1000001		Line 1	11:12 am.	
279-1234	SCREW DRIVER SET	1	9.98 SET	TAX

If you are going to sell just one of the item, you may press a <1> or just the <ENTER> key to accept the default ... otherwise key in the number of units to sell followed by the <ENTER> key. The subtotal at the bottom right of the screen will reflect your input.

The SKU's Unit Sale Descriptor appears to the right of the price each. This three letter code helps you to identify the grouping of the product you are selling. For example, 'EA' is very common for 'each,' 'CAN', 'BOX', 'DOZ', 'LBS', are also common. Pay attention to these descriptors! A customer could attempt to buy a case of oil for the price of one can if the product is incorrectly labelled ... your only check against this is your common sense pricing experience and referring to the unit descriptors.

If the SKU has no retail (usually a department category SKU or miscellaneous SKU) the CURSOR AREA will move over to the price column following the quantity input and await your input of the price. If the SKU has a retail price, the price column will be skipped over! If you need to change the retail price, you must press the LEFT ARROW key to move the CURSOR AREA back up to the retail price column, where you can type in the correct figure.

*NOTE: The System Manager has the option to prevent the sales screen from allowing access to the Price Column.*

## STATUS INDICATORS:

The far right hand column of the sales screen is reserved for use by several status indicators to help you understand non-standard situations for any given line item on the screen.

**SAL.** This indicates the SKU is currently on sale and that the regular retail price is not being charged. In addition to the letters 'SAL' at the right hand side of the screen, the price column will be blinking. An "\*" asterisk will be printed on the customer's receipt to indicate a sale price item was purchased.

*NOTE - 'Sale Priced' items will not activate the Quantity Discount Price, while the sale is active. 'Sale' prices are assumed to be your "Best Price" offered.*

**QDP.** The Quantity Discount Price indicator means that the quantity purchased has qualified for a special price. This special price and the amount required to qualify has been input previously into the inventory data base ... cashiers have no control over the QDP.

**OVR.** Override. The override indicator means that you have manually changed the price that had originally appeared on the screen for that SKU. Anytime an override is performed, the original price and the input price is recorded for managerial use.

**TAX.** Taxable using the current tax rate schedule. The sales tax rate is setup from the Master System Maintenance, System Level Options by your system supervisor.

**EXE.** Tax exempted. When a line item is tax exempted using the <F3> key while the CURSOR AREA is positioned anywhere on the SKU's row, the 'EXE' indicator will appear. If a total ticket is tax exempted, the 'EXE' will appear on all SKU lines. Pressing the <F3> key will re-tax the line items.

**NTX.** Non taxable. Anytime you sell a SKU that has been previously marked as non-taxable, this status code will appear, i.e. labor charges. A non-taxable item cannot be taxed at the sales station.

Following the input of the quantity, the CURSOR AREA will automatically move to the next row down and over to the SKU column to await the next product code.

-----									
09/28/95		1000001		Line 2		11:12 am.			
-----									
-----									
279-1234		SCREW DRIVER SET				1		9.98 SET TAX	

-----									
09/28/95		1000001		Line 2		11:12 am.			
-----									
-----									
279-1234		SCREW DRIVER SET				1		9.98 SET TAX	
LABOR		LABOR & SERVICE WORK 1/4 HOUR UNITS				3		10.00 QHR NTX	

Here you see an "NTX" appear after the price and sales unit description column if this is a NON-SALES TAXABLE item. If you have pressed the TAX EXEMPT KEY <F3> you will see "EXE" for Exempt. Normal taxable sales items will appear with a "TAX."

## CURSOR AREA MOVEMENT USING ARROW KEYS

The CURSOR AREA can be moved by using three of the four arrow keys. The up arrow will move the CURSOR AREA up one line within any column until it reaches the first line of the ticket. The down arrow moves the CURSOR AREA down in any column until it reaches the last possible row on the ticket (a

maximum of 73 lines). The left arrow key will move the CURSOR AREA to the left one column at a time.

*If you press the left arrow while in the SKU column, the CURSOR AREA will move up one row and over to the quantity column. This is the fastest and best way to change (override) a retail price!*

The right arrow will NOT move the cursor area! The right arrow will move the CURSOR (blinking underline character) one space to the right INSIDE the CURSOR AREA. This key is used to help edit existing data on the screen within a given CURSOR AREA.

To move the CURSOR AREA to the right ... use the <ENTER> key. When you press the <ENTER> key at the price column, the CURSOR AREA will move down one row and over the left SKU column.

The <PG UP> and <PG DN> keys can be used to move the CURSOR AREA in larger increments rather than one row at a time with the up/down arrow keys. The sales screen can only display 11 lines at a time. When the length of your ticket exceeds 11 rows, the screen will automatically shift and display the last few rows at the top, leaving you some 'empty' rows at the bottom of the screen. When this occurs, NO DATA is lost! Note the line number in the center of the screen.

Page Up and Page Down keys will position the CURSOR AREA at the upper left hand corner of the Product Section and move the rows of SKU's upward or downward in groups of 11 rows at a time.

**<F6> DELETING A SKU LINE:** Any SKU line can be immediately eliminated from the sales screen by positioning the CURSOR AREA anywhere along the row and pressing the <F6> key. The line will be blanked out and the sub-total will be adjusted. The row is now available for to re-input a SKU, or it may be left blank.

You can effectively erase a SKU line by overtyping a new SKU in the left column. Position the CURSOR AREA on the line you want to overwrite within the SKU column, and type in a new valid SKU number. The previous SKU's information will disappear and the new SKU's data will be shown ... the ticket sub-total will accurately reflect the change.

**<ESC> <ESC> VOID THE ENTIRE TICKET:** At any time following the input of your salesperson's code and prior to the printing of the receipt, the entire sales ticket can be voided by pressing <ESC> <ESC>. The cash drawer will open (if electronically connected), and the voided ticket number will be registered on the End of Day reports.

**<F2> LINE ITEM DISCOUNTS:** Line Item Discounts can be applied at any time to any SKU line on the ticket. Line Item Discounts are always a percentage (up to 86%) and can only be performed on a SKU line once. Position the CURSOR AREA anywhere along the SKU line then press the <F2> key. The prompt, "Enter Discount Percentage" appears in the lower left corner of the screen with the default discount percentage in the input area.

Enter the percentage discount desired. '10' will generate a 10% discount, '5.5' will generate a 5.5% discount. A zero percent discount effectively cancels the discount. The maximum line item discount percentage is 86. A discounted line will show a "D" in the status column.

You cannot do a dollar figure line item discount (only by percentage), but a total ticket discount can be entered by dollar figure.

**<F5> SUSPENDED TICKET:** Pressing the <F5> key anywhere inside the Product Section will suspend the ticket. This means that the ticket will be saved for later recall. This feature is especially handy if you have a customer that has forgotten something and will return in a few moments. Simply suspend the ticket, the screen will clear, and you are free to input the next ticket.

Suspended tickets will stay suspended forever ... you can suspend a ticket today and retrieve it tomorrow. Suspended tickets do NOT count as sales! There is no inventory deducted, no money collected.

Each salesperson's code may have ONE suspended ticket at a time! If you have a suspended ticket and attempt to suspend another one, the computer will respond with a warning message!

To **recall** a suspended ticket, simply press the <F5> key *INSTEAD* of your salesperson's code at the beginning of a ticket. The sales screen will prompt you to input your salesperson's code at the bottom of the screen ... followed by the full retrieval of the suspended ticket.

WHEN YOU RECALL A SUSPENDED TICKET, IT IS ERASED FROM STORAGE. If you void the ticket, it is gone forever. If you wish to save it again, you will have to re-suspend the ticket by pressing <F5> in the Product Section of the ticket.

## INPUT METHOD OF PAYMENT

When you have input all of the SKU lines for the sale in the Product Section of the sales screen, press <F1> to move to the MOP section. There are nine possible methods of payments ... they are completely maintained by your System Manager, and most certainly will be different from the six displayed in our samples below. Please also note that our sample Product Section is only four rows long, the actual screen display contains 11 lines.

CASH SALE																								
HOMETOWN, ANYSTATE USA 30018																								
09/28/95	1000001	Line 3	11:12 am.																					
279-1234	SCREW DRIVER SET			1	9.98	SET	TAX																	
LABOR	LABOR & SERVICE WORK 1/4 HOUR UNITS			3	10.00	QHR	NTX																	
<table border="0"> <tr> <td>1. CASH</td> <td>2. CHECK</td> <td>3. CHARGE</td> <td>39.98</td> <td></td> </tr> <tr> <td>4. VISA / MC</td> <td>5. DISCOVER CARD</td> <td>6. LAYAWAY</td> <td>.50</td> <td></td> </tr> <tr> <td colspan="2">Select M.O.P. 1</td> <td>40.48</td> <td></td> <td></td> </tr> </table>										1. CASH	2. CHECK	3. CHARGE	39.98		4. VISA / MC	5. DISCOVER CARD	6. LAYAWAY	.50		Select M.O.P. 1		40.48		
1. CASH	2. CHECK	3. CHARGE	39.98																					
4. VISA / MC	5. DISCOVER CARD	6. LAYAWAY	.50																					
Select M.O.P. 1		40.48																						

Following an <F1> from the Product Section, the sales tax and ticket total will be computed and displayed. The prompt in the lower left corner asks for the M.O.P. (Method of Payment).

Usually 'CASH' will be MOP #1 and the default will refer to it. For purpose of example, let's assume that the MOP for this ticket is 'CASH'.

1. CASH	2. CHECK	3. CHARGE		39.98	
4. VISA / MC	5. DISCOVER CARD	6. LAYAWAY			.50
			40.48		
Enter CASH Amount Tendered 40.48					

When you select the MOP type, the system will then prompt for the amount tendered. 'Tender' simply means the amount of value given to the cashier as payment for the goods ... it is not necessarily cash or check.

The default amount is equal to the total ticket amount. If you type in a number that is greater than the total ticket, the 'change' will be displayed on the screen.

If you type in an amount that is less than the total ticket, the sales screen will repeat the prompt for the MOP (you may have up to four different methods of payments on any single ticket!). The system will continue to prompt for MOP's until the total ticket is accounted for, or you run out of MOP options. After each tendering, the default amount is reduced to the total of the ticket less any previous tendered amounts.

If you type in an amount equal to the total ticket (accept the default), the MOP section is completed, no change is recorded, and control moves to the Name/Address Section.

If you press <F6> (re-do) during the MOP section, the control returns to the Product Area and any MOP information that was input is cleared. This allows you to re-do the MOP section if you 'get lost.'

Over-tendering (tendering more than the ticket total) always results in cash change being recorded on the end of day reports.

The System Manager has full control over how these MOP's function. The function of the MOP is independent of its name.

**CHECK MOP's.** MOP's that refer to checks can optionally be set to display an additional prompt every time the MOP is used:

ENTER CHECK ACCOUNT NUMBER
----------------------------

## BAD CHECK LOOKUP OPTION

If your input is matched to a previously known 'bad check' number (as maintained by your System Manager), the screen will display additional information in the lower left corner that may indicate the name(s) and address of the checking account owner.

**CHARGE MOP's (accounts receivable).** When you select a Method of Payment that is designated to be tied to the Accounts Receivable system (usually identified as 'CHARGE'), you will be prompted with "Enter A/R Number or Name" and a cursor area in the lower left portion of the ticket.

A hand-drawn diagram of a horizontal number line. The line is drawn with a pencil and has several vertical tick marks. The labels are as follows:

- At the far left, there is a tick mark with the label "Enter A/R Number or Name" written below it.
- Moving right, there is a tick mark with the label "39.98" written above it.
- Further right, there is a tick mark with the label "40.48" written above it.
- To the right of "40.48", there is a tick mark with the label ".50" written above it.
- At the far right, there is a tick mark with no label.

The diagram is drawn on a white background with a faint grid. The number line is a simple horizontal line with vertical tick marks extending above and below it.

If you key in anything other than a valid account number, the computer will begin to search alphabetically using your input as the starting point. The next eight A/R customers will appear in two columns at the top of the sales screen as shown below.

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1. MODERN BUILDERS	5. MOBILE HOME SUPPLY	
2. MONROE FENCE CO	6. NAPA AUTO PARTS	
3. MOONLITE LANES	7. N & W TRANSPORT	
4. MOTOROLA COMMUNICATIONS	8. NEESER & SONS INC	

---

09/28/95	1000001	Line 3	11:12 am.	
----------	---------	--------	-----------	--

---

279-1234	SCREW DRIVER SET	1	9.98 SET	TAX	
----------	------------------	---	----------	-----	--

Meanwhile, at the bottom of the screen, a new series of prompts is displayed in the lower left hand corner, similar to what is shown below:

Select < 1 - 8 > [ ]	39.98
N ext R e-do MOP <ENTER> = Select Again	.50
	40.48

You may choose any of the customers listed on the screen by pressing a number between 1 and 8 ... if your display does not contain a full eight listings your range of input will be restricted accordingly.

You may input an "N" to display the next eight customers. There is no way to 'back up' to display previous customer names, so make sure your starting point is lower in alphabetical order than the name you're after.

You may input "R" to re-do the MOP section of this ticket. This, in effect, wipes out any previous MOP data you input and lets you begin again to accept the tendering from the customer.

You may press <ENTER> which routes you back to the "Enter A/R Number or Name" prompt to allow you to key in a new starting point for the search sequence.

When you select the customer, the name, address, etc, will appear on the top four lines of the sales screen, and you will see the next prompt in the lower left corner:

Correct Customer ? <Y> or <N> [Y]		39.98							
		40.48						.50	

If you answer "N" the system will route you back to the "Enter A/R Number or Name" prompt. A "Y" answer will tell the system to proceed. If your System Manager has set up the option that requires the Manager's Keyword to be input before accepting an over credit limit sale, the prompt will appear as shown below:

300.00 Over Credit Limit		39.98							
		40.48						.50	
Enter Manager's Keyword									

If you do not know the Manager's Keyword, your only option is to press <F6> and re-do the MOP section.

If you select a customer whose account has been 'shut off' by your System Manager, you will see the following prompt in the lower left corner.

Credit Denied [ ]		39.98							
		40.48						.50	

Your only option here is to press <ENTER> to be re-routed back to the Product Section of the sales screen for a possible chance at re-doing the MOP or voiding the sale.

*NOTE - You will see an extra line on A/R customer receipts that indicate the dollar amount being charged to the customer's account for the current sale. The figure shown does NOT represent the customer's current account balance! This new line will help identify what amount was charged when the ticket was handled using multiple methods of payment.*

PREFERRED CUSTOMER OPTION.

If your System Manager has activated the Preferred Customer option, you will see the prompt shown below in the lower left corner of the screen; otherwise you may skip this section because the screen will jump to the Name/Address Section described below.

```

Write to Preferred Customer Files?
    39.98
    40.48
    [Y]
  
```

The Preferred Customer List helps management track specific customers for special sales and promotions. The default answer at this prompt will be a <Y> if this sale qualifies as being of the size and type that management has determined it wants to record; if the default is <N>, the sale did not pass this test.

You can input either a "Y" or "N" ... overriding the default is subject to your company's policy.

Answer "N" and the screen will proceed on to the Name/Address Section of the sales process described below.

A "Y" answer means that you wish to trap this customer's information for storage in the Preferred Customer data base.

Enter Customer's Name		39.98							
		40.48				.50			

The next prompt is very similar to the A/R Name or Number prompt, but there are NO Preferred Customer account numbers! Type in as much of the customer's last name as is necessary to begin a brief search to locate the exact account you're after.

A group of four Preferred Customer names (with a portion of the address line, city, state and zip - to help exact identification) will appear in the upper four lines of the screen, along with the numbers 1 through 4 (unless there are fewer than four names displayed). The lower left corner of the screen will display the following prompts:

Select Name < 1 - 4 > <N> = New Name		39.98							
		40.48				.50			
<ENTER> = Again < arrow > = Next/Prev [ ]									

Here, you select any of the four choices from the top of the screen, or <ENTER> to route you back to the prompt, "Enter Customer's Name".

Pressing the up or down arrow key will instruct the system to display the next eight or previous eight names in the Preferred Customer data base.

An "N" answer tells the system that you wish to input a new name. But whether you are inputting a new name or have chosen an existing name from the list, the CURSOR AREA is positioned in the upper left hand corner of the screen, with the default being the Customer Name.

SAMPLE PREFERRED CUST NAME		Sort Code: AAA		Sales Code:	
1111 S. 1ST STREET		Type: Size 10		Date: 04/22/82 01/22/93	
HOMEVILLE ANYSTATE USA 23234		Phone: 703-555-1212		208-555-1212	
WIFE: SUSIE ...BUYS LOTS OF SCREW DRIVERS FROM US					

09/28/95	1000001	Line 3	11:12 am.
----------	---------	--------	-----------

279-1234	SCREW DRIVER SET	1	9.98 SET	TAX	
LABOR	LABOR & SERVICE WORK 1/4 HOUR UNITS	3	10.00 QHR	NTX	

	39.98
	.50
	40.48

At this point you may press <F1> to accept all Preferred Customer information and to FINALIZE THE TICKET!

You may type in new information or you may press <ENTER> to default the data in each CURSOR AREA. The CURSOR AREA will move down through each of the data areas.

The CURSOR AREA will move from field to field allowing you to input new information or to press <ENTER> to default the existing information. The Name and Address are 30 character fields, while the City State and Zip code are separate fields (even though they first look like just one).

The sort code is a specific code (max 3 characters) set up by your system manager to assist in identifying certain types of customer accounts. Your company policy will dictate whether or not any of these additional fields should be changed from the sales screen.

The sales code is another three character code that is written to the preferred customer folio file, that will help the system manager identify specific types of sales. The Type field is ten characters long and can contain any kind of text information that your store feels might be appropriate.

There are two dates and two phone numbers available for input. They can be used for anniversary dates, birthdays, warranty expiration dates, call back dates, etc. The phone number fields are 12 characters long which will allow you to input area codes.

The fourth row from the top of the screen is the comment line. This line is 79 characters long and can contain any kind of text.

When you have answered the comment line prompt (terminated with an <ENTER> key), THE TICKET IS FINALIZED! (unless, of course, you had earlier pushed <F1> to default the Preferred Customer information.)

## INPUT NAME AND ADDRESS INFORMATION

Systems that do not use the Preferred Customer Option will be prompted to type in the customer's name and address for use on the receipt. The name line will be captured on certain End of Day reports. The name line will also be associated with check and charge card tenders. During the till reconciliation process, the customer's name (maybe just the last name) will be displayed alongside the check or credit card amount for easy cross referencing.

Whatever is displayed in the upper four lines of the sales screen will be printed on the customer's receipt, but it will not be stored anywhere else.

You may press <F1> to skip the input of these four lines and to immediately FINALIZE THE TICKET! Otherwise you may enter new information on any of the four lines or you may press <ENTER> to default past each of the lines.

When you answer (or default) the last (fourth) line, the TICKET WILL BE FINALIZED!

## FINALIZE TICKET

The ticket is finalized by the printing of the receipt. The screen will show the words, "Update in Progress" blinking in the lower left corner of the screen, just above the change amount.

A good rule of thumb is: if the ticket printed, it's in the computer. Once printed, the ticket can not be edited or voided ... to make adjustments you must enter a new ticket.

*Note: The System Manager has full control over whether a particular type of ticket will generate a receipt. In fact, each Method of Payment can control the number of receipts printed. Certain types can be set to print more than one copy, while others can be set to not print at all! Regardless of the number of receipts physically printed, the ticket is finalized during the "Update in Progress" screen display.*

When the update is complete (and the receipt is printed), the CURSOR AREA will return to the three character prompt for Salesperson (or Cashier) code. All other data from the previous ticket will remain on the screen to allow for re-printing of receipts.

To re-print a receipt, press <F4> from the Salesperson's code prompt, then <A> for re-print. **Once you key in a valid salesperson's code to start a new ticket, the previous ticket can never be re-printed.**

## SPECIAL SKU'S and CIRCUMSTANCES

**QUESTION MARK SEARCH.** The sales screen can assist you in looking up unmarked products if the SKU numbers have been determined in an intelligent manner. The "?" is used in the SKU column of the Product Section of the sales screen to trigger this search.

For example: A customer is buying an unmarked product, let's say a man's belt. You know that all belts are SKU numbered beginning with '9000'. To look up which SKU is correct for this particular belt, you key in '9000?' on any line within the SKU column on the sales screen.

Down the left side of the screen will be the letters A through D. You may select any of the four SKU's by pressing the corresponding letter or use the up arrow to show the previous four SKU's or the down arrow to display the next four. You may also press <ENTER> to exit the search.

**DESCRIPTION CROSS REFERENCE.** An optional feature of the StockBoy sales screen is the Description cross reference lookup. This look-up helps you find SKU's by words in their description. Before using this look-up, make certain your system manager has activated the Description Cross Reference feature.

After your input, the screen displays a series of SKU's that contain the words you're seeking inside their description fields. Since the use of abbreviations and even misspellings can lead to confusion, we recommend that you enter only portions of the words you're looking for, such as 'gre' for 'green', or 'auto' for 'automobile'. The best advise is --- experiment with this feature until you're comfortable with it!

A recipe SKU will trigger a prompt in the lower left corner of the screen:

Enter Recipe Quantity

39.98

40.48

.50

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The recipe SKU on the sales screen will now be erased, and the SKU's that comprise the recipe will be displayed one after the other on the screen as though you had typed them in one at a time. The quantities will be calculated and displayed automatically. The CURSOR AREA will be moved to the bottom of the ticket following the last component of the recipe.

If you key in a recipe SKU and there are other lines of SKU information on the sales screen below it, the components will appear and 'jump' over any existing lines ... they do not have to be on consecutive screen lines.

The recipe components and quantities stored in the computer are NOT editable by the cashiers from the sales screen. If the package pricing or quantity calculation is not correct, contact your System Manager immediately. The prices and quantities (once they have appeared on the sales screen) ARE editable by positioning the cursor and typing in new information.

HINT: When you sell a SERIALIZED item you will be asked some different questions. A serialized item is one that must be tracked individually, by serial number, in addition to it's SKU Number. Your screen will look something like this:

279-1234	SCREW DRIVER SET	1	9.98 SET	TAX	
LABOR	LABOR & SERVICE WORK 1/4 HOUR UNITS	3	10.00 QHR	NTX	
200-1234	19 IN. COLOR/REMOTE CTL TV		199.95 TV	TAX	
Enter S/N ==>					
<R> = Refund    <?> = Scan			39.98		

At this point you are to enter the serial number from the individual item you are selling. Because of the serial numbers Serialized Items can only be sold one per line. Incorrect serial numbers (your input must match a serial number on file) will be rejected. Press <?> <ENTER> to call a list of the current serial numbers on file to the top of the screen. You can search through them four at a time until you find the one that matches the unit you are selling. Then select the line letter beside the correct serial number to move that serial number to the ticket.



200-1234	19 IN. COLOR/REMOTE CTL TV		199.95 TV	TAX	
	S/N: 2345654563				
Enter # of Days Under Warranty	0				

Next you will be asked to input the number of days of Warranty for this item. The system will translate the number of days you enter to the correct date in future when the warranty expires and put it on the ticket for you.

You will be forced to put in the name and address of the customer when you finish the ticket because that information along with the special serialized data you collected will be stored for recall by the office at a later time.

HINT: When you need to look up a SKU number while you are writing a ticket, go to the SKU number column of the Product Section. Then type in the first few characters of the SKU number you are looking for and end it with a question mark.

279-1234	SCREW DRIVER SET	1	9.98 SET	TAX	
LABOR	LABOR & SERVICE WORK 1/4 HOUR UNITS	3	10.00 QHR	NTX	
147-12?					

*EXAMPLE: You need to find the SKU number for an item you know is in the 147-12-- range, type in 147-12? (YOU WILL HAVE TO TYPE IN THE DASH) and you'll see the next four items at a time alphabetically after the characters you typed in. This works like the customer name search on charge tickets. The SKU number, description, quantity on hand, price, and the location / or on order status, will be displayed at the top of the screen. Once you have found the product that you are looking for, move it directly onto your ticket by simply pressing the letter corresponding with the item you want.*

HINT: Need a text or comment line to put added information on a ticket? Press <ENTER> on an empty SKU number, the cursor will move to the description column so you can type in your message. The extension of any line with no SKU number MUST be zero, or it will be forced to be zero. In order to have an amount in the extension column you must have a SKU number too.

## CALCULATED QUANTITIES EXTENDED PRECISION & BACK FIGURE

There are two types of SKU's where the quantity input is handled in a unique way, 1) Extended Precision and 2) Back Figure SKU's.

Extended precision simply means the use of decimal places in quantities for items that can be sold in units smaller than 1. Examples include rope (priced by foot but often sold in inches), chain, nuts, bolts, bulk foods, carpet, etc. These items could show inventory quantities like '27.25', '0.475', or '3434.10' ... all of these quantities have decimal places rather than just whole numbers.

Whenever a SKU has extended precision for quantity, the quantity sold will be input in a special way at the bottom of the screen using a CALC formula (the highlighted CURSOR AREA will NOT go into the 3rd column as it does on a SKU without extended precision).

111-1111	HANGING ROPE	3.98 FT	TAX	
20/12				
Enter CALC formula using */+-( )				

The calc formula field at the bottom of the screen allows you to type in a mathematical formula that will calculate the quantity sold. This sounds difficult, but it really isn't! The calc formula can be just a number by itself. Example: you sell hanging rope for \$3.98 a foot ... the customer wants 18 inches .. you enter '1.5'. The formula is '1.5' and will appear in the 3rd column for quantity and the calc formula input field will disappear from the bottom of the screen.

Otherwise you can use the calc formula exactly like a hand calculator...using '/' for division, '\*' for multiplication, '+' for addition, and '-' for subtraction. If you need to get fancy, you can use parentheses to help set off parts of your formula following all the standard rules of algebra.

Example: the customer wants 20 inches ... you enter '20/12' (twenty divided by twelve) ... the calc field goes away and '1.67' appears in the quantity column.

Example: You price carpet by the square yard (\$14.00 /sq yd) and the customer brings up a roll that is 15 running feet long. You know the carpet is 12 feet wide ... how do you enter the quantity? ==> 15\*12/9 This leaves a quantity of '20' in the 3rd column of the screen. (15\*12=number of square feet ... divide by 9 to get # of square yards)

The last few characters of the description are REPLACED by the calc formula on the screen and on the receipt to show the customer exactly how the quantity was calculated. An '=' sign is inserted just ahead of the formula to help separate the formula from the rest of the description at the left.

The diagram illustrates a cross-section of a ship's hull with various internal compartments and structural elements. Key features include:

- 111-1111**: A compartment label on the left side.
- HANGING ROPE**: A label for a rope structure within the compartment.
- =20/12**: A dimension or ratio label.
- 1.67**: A dimension label.
- 3.98 FT**: A dimension label.
- TAX**: A label, possibly for a tax or a specific compartment.
- 6.63**: A dimension label for a lower compartment.

The diagram uses solid lines for structural boundaries and dashed lines for internal divisions or measurement lines. Vertical lines indicate the height of compartments, while horizontal lines indicate the width or length of sections.

## EXCEPTIONAL TICKETS

**NOTE - ALWAYS HANDLE REFUNDS ACCORDING TO YOUR COMPANY POLICY - The following is ONLY a statement of how **StockBoy** handles refunds when your firm approves.**

279-1234	SCREW DRIVER SET	<1>	9.98 SET	TAX	
1. CASH	2. CHECK	3. CHARGE	<9.98>		
4. VISA / MC	5. DISCOVER CARD	6. LAYAWAY		<.50>	
Amount Tendered		<10.48>			

What happens when Mrs. Smith gets the wrong product and your store policies allow her a refund. Write the ticket up just like usual, except use a negative quantity sold. We will simply "un-sell" the item. The screen will show a negative dollar amount and when you press <F1> the subtotal will be a negative amount. The amount of tax to refund will be computed and displayed with a negative amount, along with the total to be refunded. Point the receipt with a Cash M.O.P., and give the customer her refund. Each unit with a negative quantity will be put back in stock, adjusting the inventory automatically, just like the money. If your company works by commission, be sure to use the initials of the salesperson who sold the item originally. That way the commissions will be deleted from the correct salesperson.

*NOTE - Refunds that are too large to be taken from the Till, are usually handled by check. These transactions should be written on a paper ticket to be input later, since they do not affect the cash in this Till. Your management will have special procedures for these occasions.*

## EXCHANGE TICKETS

279-1234	SCREW DRIVER SET	<1>	9.98 SET	TAX	
279-1345	DELUXE SCREW DRIVER SET	1	13.98 SET	TAX	
1. CASH	2. CHECK	3. CHARGE	4.00		
4. VISA / MC	5. DISCOVER CARD	6. LAYAWAY		.20	
Enter Method of Payment		1	4.20		

Mrs. Smith just made a purchase, but found out she bought the wrong size - what do you do? **StockBoy** makes it easy! Write up the sale just like normal, EXCEPT your quantity is going to be a negative amount (You are just going to "un-sell" the item that was too small.) Then on the next line type in the SKU number for the right item Mrs. Smith needs. This item will have a regular (positive) quantity.

(The receipt will show negative dollars beside the item returned and positive dollars beside the new item.) Press the <F1> key and the screen will show a "net" subtotal, tax, and balance. Then enter the method of payment, and print the receipt.

## MISCELLANEOUS MERCHANDISE

-----									
MISC		MISCELLANEOUS MERCHANDISE				1	0.00 EA	TAX	

Imagine what you should do if someone brings a product to the checkout stand that has no label or SKU number. If you have a product to sell but no SKU number, you can utilize your miscellaneous SKU number (ask your manager what your number is.) You will type in the description and the price you are going to charge but aside from this it is a regular sale. Get an extra copy of the receipt so you can go back later and turn the Miscellaneous item into the correct SKU number.

## SALES SERVICES MENU

You can access several other functions and services from the sales screen by typing <F4> MENU at the Sales ID Prompt. You will see the SALES SERVICES MENU displayed at the top of the screen.

A= Reprint	E= Sales Race	I= Time Clock
B= Special Tickets	F= Transfer Ticket	J= Journal Tape
C= Received on Acct (ROA)	G= Acct.Receivable Access	K= 'Z' this Till
D= N/A	H= Message Center	L= LOGOFF

The bottom of the Sales Services Menu Screen will prompt you to:

Select Service <ENTER> = None
-------------------------------

Just press the letter beside the service that you want to select. In the following paragraphs we will go through the functions and process of each of the choices on the menu.

### REPRINT

Select this function to print the last Sales Ticket you processed. You can get reprints as long as you have not entered a valid Sales ID to start a new ticket.

### SPECIAL TICKETS

Special Tickets involve those transactions where there is a time gap between the moment a customer decides he wants a product and the moment he pays for it. Examples include Layaways, Special Orders, On Approval, Repair, Work in Progress tickets, etc. Since Special Tickets encompass a completely unique sales screen and functional approach, we have included all information on them at the end of this Reference Manual section.

## RECEIVED ON ACCOUNT (ROA)

When someone comes in to make a payment on his charge account you need to handle it in a special way. Since this is not really a sale but actually a bookkeeping transaction, go to the Sales Services Menu and select "Received on Account (ROA)." The screen will then shift into Received On Account mode. In this mode everything will function similar to a regular ticket. The major difference will be that you cannot put the cursor into the SKU number column, and you will enter your Sales ID at the bottom of the screen. You will be able to enter the description of the payment, such as "CHECK # 1234." Then enter the amount of the payment. Press <F1>, select the method of payment, and type in the correct customer's name to select the correct charge account and print out the receipt.

```
|
|-----|
| | CHECK # 1234 THANK YOU | 250.00 | |
```

There are two things to consider when accepting ROA's at the sales register. (1) all information in the first line's Description column will appear on the customer's billing statement, (such as the "check #1234 Thank You" in our example above), and (2) the amount entered will be placed into the customer's account in a Balance Forward method. This means that the \$250.00 example above will be 'used' by the computer to pay off the oldest invoices first. This is very good for those customers who have been set up for Balance Forward statements (form 'B'), but for those who are set up for Open Invoice (form "C") the result isn't quite as good. The Sales Screen does NOT give the operator a chance to pick which invoices will get paid off with the ROA, so the money may not be applied to the same invoices as the paying customer expects.

## SALES RACE

The Sales Race will allow you an easy way to see which salesperson is in the lead at any time during the day, and give you a quick 'peek' at your labor/sales productivity. Select the SALES RACE option and you will see each salesperson and his/her performance effective right now. Press the <ENTER> key to return to the sales screen. Its kind of fun to see who's ahead during the day. The Sales Race will look like this:

```
|
|          SALES RACE: 09/28/95          |
|-----|
| DMS  2  $263.35  29.9%  6.00 hours    |
| DEB  17  $617.73  70.1%  4.00 hours    |
|-----|
| TOTAL 19  $881.08  100.0%  10.00 hours |
| Sales per Ticket: $47.18      Sales per Payroll Hour $88.11 |
| Sales per Labor Dollar: $13.09  Labor is 7.63% of Sales    |
|
| Figures Include Sales Activity from ALL Tills!             |
| Sales Tax is NOT Included                                   |
|
```

The figures represented on the Sales Race Screen contain all sales totals less Sales Tax regardless of the method of payment. Basically all Sales Taxed Revenues, plus any Non-Taxed and Tax Exempted items are

included. ROAs and Special Order Deposits are not a "Sale" and are not reflected here. Payments on Layaways are also not included here. NO SALES ACTIVITY FROM THE "PRACTICE TILL" IS INCLUDED HERE. The Sales Race will be automatically re-balanced, just as a precaution, each time an Inventory End of Month is executed, unless a Till is left active during the process.

If you leave this display on the screen for more than 15 seconds, the computer will shut it off and return to the main sales screen display. Also, if your system manager has activated the Sales Itemization feature, there will be a prompt at the bottom of the screen, "<CTRL P> to print Sales Itemization report".

Some StockBoy end-users will see an additional prompt that asks whether you want to include data from All tills or from just non-Z'ed tills --- please refer to your system manager for information on which way your company wants to view this information.

## TRANSFER TICKET

This option is ONLY used in Multiple Store Systems. Simply stated; a transfer ticket is designed to assist the satellite stores within a multi-store installation in handling the shipping and receiving of goods between stores independent of the warehouse or master computer control.

A transfer ticket uses the same procedure as a standard sales ticket following selection. If the Manager's Keyword has been activated for this menu option, the operator must first input the Keyword before the XFR ticket can begin. The computer will assign a four digit number following the letters "XFR" to identify the ticket. XFR tickets will appear on the ticket summary at End of Day. The ticket asks for your Sales ID initials, and then asks if this is a "Transfer In or Out?" Naturally, inbound means that inventory quantities will be increased, outbound means that the inventory will be decreased.

The INBOUND or OUTBOUND header line will appear on the first line of the ticket. The operator will NOT be able to access the first line to alter the description. No subtotal, sales tax, or total will appear on the ticket; but the price each will be displayed to assist in making sure the correct SKU has been input.

A transfer ticket ONLY updates quantity on hand figures. It does not update the unit sales history, the ticket count, the ticket count per salesperson, the salesperson's commissions, the End of Day posting summary, or any method of payment total. Its only purpose is to add or remove quantities on hand from inventory.

The quantity column on the sales screen will be strictly controlled by the software to force all quantities on an INBOUND XFR to be negative, while all numbers OUTBOUND will be positive. This guarantees that the inventory will be adjusted properly. If you need to make an adjusting entry after an XFR ticket has been made, a new XFR ticket of the opposite type must be entered.

Ticket lines may be edited and deleted as per a standard ticket. The ticket may be voided or suspended without problem. When the <F1> key is pressed to TOTAL the ticket, NO Methods of Payments will appear -- the screen will be routed directly to the Name/Address areas. The first line will be changed automatically to read "TRANSFER TICKET FROM" or "TRANSFER TICKET TO". The cursor will be positioned immediately following this text to allow you to enter the source store name or the destination store name. No system level check is performed on your input to verify that a legitimate store ID is entered; any information to identify the correct store will be fine.

The important information should be trapped on the first description line of the ticket and on the Name line of the address so that both will appear on the End of Day ticket summary to properly identify the ticket as an XFR IN or XFR OUT. Note that the ticket will show a CASH tender with zero amount.

XFR tickets will be printed three times automatically, one copy for the originating store, one for the destination, and one for the warehouse to match up the tickets. This count is 'hardwired' into the software,



but re-prints are allowed for additional copies. All line items from all XFR tickets are captured in the Critical Edit report at End of Day for security reasons and evaluation.

## ACCT. RECEIVABLE ACCESS

You can call up the customer's Charge Account File from this option. You will be prompted the rest of the way. You cannot CHANGE anything there, but you can see the current status of the account. This is handy when someone wants to pay off his bill, or has a question about his bill. Unless you see the category "Daily Folio" above the "Current" total the data you see will not include activity done since your last End of Day. Management can active the Daily Folio which will track any charges/payments made during the current day (or since the last network transmission in Satellite Stores).

If you have a new charge customer that has been approved by your company policies but has not previously had his account opened, the floor manager can open the account. After entering this section, type <\*> at the point that the screen is asking for the customer's name. You can then type in the customer's name, address, and other information needed by the billing department. Then you can go back to the Sales Screen and write up the sale.

## MESSAGE CENTER

All clerks have access to the system's message center via the TILL LOGON NAME. If a Bulletin has been sent for any TILL name, it will appear on the screen immediately after the 1st station logs on to that TILL Name. Otherwise, a private or non-private message will cause the words 'Message Center' to blink on the services menu screen. There is no indication that a message is waiting unless the clerk access the sales screen services menu. Refer to the System Utilities manual for details on how to operate the Message Center. Once a clerk accesses the Message Center, the system will return to the sales screen at the input Salesperson's Code prompt.

## TIME-CLOCK

When you select the Time-Clock option you will see the ID prompt, with "SIGN IN" in front of it. Type in your sales initials. Then you will be asked the date of the timecard entry you are about to make, just press <ENTER> to accept today's date.

Next you need to type an <I> to check in, an <O> to check out, or a <E> to Exit the Time-clock. You will be asked to verify the date for your check In/Out. Unless you are making a corrective entry for a previous day, just press <ENTER> to accept the system date. The Time Clock system maintains the entries by date until that date is processed through the End of Day. When the screen asks for the date and time simply press the <ENTER> key to use the current date and time. Or, if you were delayed from timing in because of customers, you can type in the actual time you were back ... this is called a manual entry. Using the computer's date and time by just pressing <ENTER> is an automatic entry.

Be ready to explain why you entered a manual time instead of an automatic one. Your manager will be able to tell the difference. If you need to enter a time manually you can either use the standard military time format (24 hour clock - 16:48) or you can use regular time with an "A" or "P" (4:48P).

You can delete ALL of your time card entries for the day, by pressing <F6> REDO. In case you've made a mess and want to re-enter them. The deleted entries will be printed with the End of Day reports, and the time of the deletion will be included with the Critical Edits Report.

## JOURNAL TAPE

If you need to view the transaction history for this Till (such as after a power failure) to see if a certain transaction was entered, select the 'Journal Tape' Option from the Sales Services Menu. The bottom of the screen will instruct you to press the <SPACEBAR> to print out the previous method of payment entry in the file. Press the Spacebar again to print the next previous method of payment. When you have seen enough of the data press <ESC> <ESC> key to quit. You will be returned to the menu, where you will press <ENTER> to return to the sales screen.

*NOTE - The Journal tape can only be printed on slave printers (not connected directly to the computer, but connected to the terminal). Common printers will prevent use of the journal tape.*

## 'Z' THE TILL

(Systems with "Automatic Z-ing of Tills" will not even see this option) All right you've put in a full day and it's time to shut down your till and go home. Select the "Z Option" on the Sales Services Menu and you will start closing your till. You'll decide if you want to print a recap of today's tickets.

*NOTE - You can do this at ANY screen once you have logged on with this Till Name. Many firms have clerks log off out front and take their till to a screen in the office, where they log back on with the Till Name and do their 'Z-ing' with less confusion. It also means you can do a Till Change in seconds, even during a busy time.*

DENOMINATION COUNT FOR TILL2		
PENNIES	0	0.00
NICKELS	0	0.00
DIMES	0	0.00
QUARTERS	0	0.00
FIFTY CENTS	0	0.00
OTHER COIN	0	0.00
DOLLAR BILLS	0	0.00
FIVES	0	0.00
TENS	0	0.00
TWENTIES	0	0.00
FIFTIES	0	0.00
HUNDREDS	0	0.00
OTHER BILLS	0	0.00
CREDIT CARDS	13	839.54
CHECKS	17	582.59

## COUNTING THE TILL

You will next see the "Denomination" screen for counting the till. You are going to 'inventory' your till. Type in HOW MANY pennies, nickels, dimes, quarters, etc. the system will compute the values and display them on the screen. (Humans just don't do that at the End of the Day as well as **StockBoy!**)

Your credit cards (Visa, and Master Charge) are handled in a little different manner. If you don't have any credit cards go past this with the arrow keys. If you have some credit cards you will see how many card

transactions you had and their total value. Count the number of bank cards you have in your till and see if they match first. (These are the Credit Cards that go to the Bank only, like VISA and MASTER CARD, other charge cards are handled differently.)

Press the <ENTER> key to see the detail of the each slip the computer thinks you have. From here you can print out a complete list of all the credit cards for this Till by pressing <P>, or you can edit any slip to make sure it is the same as what you actually have. You can also add one if it isn't already there. If there is one listed that can't be found, you must set the value of the slip to zero, this has the same affect as erasing it. But management will be able to check it out later.

Checks are handled in almost exactly the same way. If you have any questions just look at the credit card section above.

Press the <F1> key to proceed. You will now see if you are over or short. The screen will show you each of your till categories, and tell you if you are over/short in any one of them. This way you can find your errors easier. If you are in balance, press <ENTER> to accept the till. Next you will be asked if you want a printout of your count, press <Y> for as many copies as you need. When you have all the copies you want press <N>, and you are finished.

Your manager will complete the end of day when all tills have been Z'ed. Your manager can re-open a till that has been Z'ed before an "End of Day" has been processed. If there are problems that you need to resolve before you accept the Z Report, jump back to sales screen by pressing the <ESC> key twice, and logoff without accepting the "Z".

## FINDING THE OVER/SHORTAGES

If you are over or short the till is "out of balance" either way! Your duty in counting the till is to be sure that your TILL COUNT is accurate. Management will have a procedure for you to follow. If you are short or over press <R> to recount the till and quickly check for a miscount. When you have checked your count and you are sure it is accurate you can press <ENTER> to accept the till and finish the Z. Be sure to follow you firms procedures if you are out of balance.

*NOTE - Anytime a <R>e-count is performed on a till (either in the Till 'Z' or End of Day), the System History will record the increase or decrease to CASH, CHECKS, and/or CREDIT CARDS. Evaluating re-count changes may become necessary if managers suspect that cashiers might be arbitrarily controlling overages and shortages. The History only reports the net difference between the initial totals and the final totals on the three aforementioned categories. The TILL NAME is described in the history entry unless the re-count change occurred in the E.O.D. master combined till, in which case the entry is "E.O.D. RE-COUNT".*

## DAILY REPORTS

After you have accepted your "Z" and logged off, collect your till and the reports from the printer and put them where your manager has requested.

## LOGGING OFF

If you need to change Tills, or shut the system down for a few minutes during the course of the business day you can do it without disturbing the data by selecting this option. This will log you off from the system, leaving all your data intact. (You'll see "PLEASE LOGON" on the screen anytime the screen has been "Logged Off.") To come back just log back on with the same till name.

*NOTE - This can be used when changing shifts. Log your till off and take your till to the office. The next checker simply logs on with the till name they are going to use and puts the new till in the drawer. In the office you log on again with your till name. Now you can "Z" your till in peace and quiet while sales are going on at the Sales Register.*

## CLOSING THE SALES END OF DAY

Each till that has been "Z'ed" is closed and unavailable for use until an END OF DAY has been run. The END OF DAY is run from the internal menus and requires a LOGON NAME with at least a LIMITED Privilege Level in the SALES Option. See the SALES section of the manuals for more information on running the END OF DAY TILL UPDATE. After running these reports your tills will again be open and ready for a new day. (Your Manager can re-open a 'Z'ed Till without going through the EOD, but you'll have to ask.)

## HIDDEN KEYS AND THEIR FUNCTIONS

There are several special functions that are available from within the Sales Screen. These special key combinations represent 'short-cuts' and advanced features, for the proficient operator.

<CTRL> <R> Will ignore Discount and Price Override restrictions, for one the next ticket only. Must be used BEFORE entering Salesperson's Initials, it will bring up the "MANAGER'S KEYWORD" Prompt. Once the Manager has correctly typed in the Manager's Keyword, you can type in your Salesperson's Initials. This will override the restrictions on Discounting and Price Overrides FOR THIS ONE TICKET ONLY.

<CTRL> <W> For Warranty Code Information Access. When in the Sales Screen, place the cursor on a line containing a SKU and press <CTRL> <W>. Your screen will be replaced with the Warranty Instructions for this SKU. It will also display which Supplier and address to use.

<CTRL> <C> Short-cut to the Preferred Customer System Menu. From there you can view and edit names in the Preferred Customer files.

## PROBLEMS AND HELP

The system will handle almost every situation that you will encounter during your sales day. However, there may be a few occasions that are beyond normal operations. Here is how we handle system start-up, power failures, or an error message.

## START-UP AND LOGON

When waking the system up, from a power off condition, all remote terminals and printers must be turned on first. Then turn on the power to the main computer. (Some systems are equipped with a single power switch that takes care of this procedure. Consult your system manager for details.) Now go out to the Sales Terminal and LOGON.

*NOTE - The terminal screen may be blank, the terminal's screen takes lots of little naps. Touch the <ALT> key. (Use the <ALT> key because it will not have any affect if a program was waiting for input when the screen went to 'sleep.') The screen will do this after a few minutes of inactivity to prolong the life of the screen.*

You should see the "PLEASE LOGON" message. Logon with your till name and password. When you see the Sales Screen you are ready for business.

## POWER FAILURES

Once in a while that ever constant, the electrical service, can fail. You can loose all power with no notice. IF YOU LOOSE POWER get the main computer and all other components switched off immediately! The main possibility of harm to the equipment comes when the power returns. It is common for the power to surge and flash a couple of times as the electricity is restored to the line. Fluctuating power on and off to the computer may cause physical damage to the power supplies, so be sure to switch the equipment off during a power failure! Data is retained in a special way that leaves only the ticket you are currently working on in jeopardy.

The SAFEST POINT to leave the system is resting at the Salesperson's ID Prompt or at "PLEASE LOGON."

If you were working on a ticket but had NOT PRINTED the receipt, this ticket would be totally lost and would need to be redone. If you had gone through the print cycle, it would be fully recorded and would not need to be redone.

During the power outage you can continue to make sales by writing up a paper tickets with ALL the information like SKU number, quantity, and price; so we can input the information when the power comes back on. Use the "Journal Tape" option on the Sales Services Menu <F4> to be sure which transactions got recorded and which didn't.

## ERROR MESSAGES

The system is constantly checking for any special circumstances that could lead to problems later on. **StockBoy** will alert you to contact customer support if the system detects anything irregular. IT IS IMPORTANT TO CONTACT YOUR CUSTOMER SUPPORT TEAM BY PHONE any time you get that message!

## \* \* R E V I E W \* \*

The following is a Re-Cap of the most used parameters you will be working with. The answers listed are those most usually used. Any special changes that your firm uses should be shown here as changes. This manual may refer to these categories by their common answer, not your firm's actual code used.

### FUNCTION KEYS

<ESC> <ESC> Void Ticket

<F1> Total Ticket (advance to next step)

<F2> Discount (line or total ticket)

<F3> Tax Exempt (line or total ticket)

<F4> Sales Services Menu

A= Reprint	E= Sales Race	I= Time Clock	
B= Special Tickets	F= Inventory Access	J= Journal Tape	
C= Payments on Acct (ROA)	G= Acct/Receivable Access	K= 'Z' the Till	
D= N/A	H= Message Center	L= LOGOFF	

<F5> Suspend Ticket

<F6> Re-Do (also deletes line items and time card entries, also 'backs up' to previous step in sales process)

### QUICK GUIDE FOR SALES PROCEDURES

**START-UP:** Make sure all computer equipment is turned on and has power to it before turning the computer on. Make sure there is NO Floppy Disk in the computer's disk drive. Power up the computer. You should see the system doing an activity on the screen within 30 seconds, and the system will automatically arrive at your usual "PLEASE LOGON" screen. The terminals should also be at the "PLEASE LOGON" shortly afterward.

**SHUT-DOWN:** Make sure every terminal is at the "PLEASE LOGON" screen. Bring the computer to the "PLEASE LOGON" screen also, and type in the Logon Name of "BYE." (This can ONLY be done from the main computer keyboard!) The screen should clear and tell you to "REMOVE ALL DISKETTES AND TURN OFF POWER." When you see this message on the screen, turn off the power to the computer. Then you can shut off the other units connected to the computer if you want.

**EMERGENCY SHUT DOWN:** In the event of a loss of electricity, get the computer switch turned off to protect it from power surges when the power is re-connected. When power is resumed and stable, go through the normal Start-Up sequence. Your system should have a power protection device that will throw a 'cut-out' switch anytime power is lost. Then you do not need to turn off the computer switch, but you will need to press the protection device's RESET switch once the power returns.

ANYTIME use of the **StockBoy** system is halted during the course of business, continue making sales with paper tickets. Write down the SKU number, quantity, price of the items being sold, and the Method of Payment so they can be re-entered later when the power comes back on.

PRACTICE TILL: A "Practice Till" is provided in the system to be used for training purposes. When you log on to the PRACTICE Till, all functions of the sales screen will appear to function properly. EXCEPT no stock will be deleted and no dollar figures will be recorded. Any transactions completed will identify that they were made on the PRACTICE TILL by the invoice number of # 0000000.

DISCOUNTS: Functions similar to Tax Exempt.

TAX EXEMPT SALE: At Step #3 above press the <N-TAX> key to mark a line (or after step #4 to mark the entire ticket) as "Tax Exempt," then enter the quantity to sell and press <ENTER>. After Totaling the ticket you can enter the customer's Tax Exempt Number.

SUSPEND A TICKET: You can Suspend a ticket by pressing <SUSP>. If you are in the product section of the ticket (press REDO to get back there if needed), and you do not have another ticket already suspended. You can RECALL a suspended ticket by pressing <SUSP> at the Sales ID prompt, and entering your initials when asked. You do not have to be at the same register or till when you call it back.

ROA TICKETS: At the Sales ID prompt press <MENU> key, and select the Received on Account Option. You will be asked for your initials; then the description of the payment (this description will show up on his statement), and the amount of the payment. Next you will be asked the method of payment and amount tendered questions. Last you will be asked to identify which account made this payment. Select the account in the usual way and print the receipt.

# SPECIAL TICKETS

## Introduction and Definition:

The StockBoy Retail Management System Version 7.2 (introduced in July of 1994), and StockBoy Version 8.0 (introduced January 1997), and StockBoy98 Version 8.1 (introduced March 1998) include Special Tickets, a flexible means of handling those non-standard transactions at the sales register ... including Layaways, Special Orders, Estimates (Quotations), Temporary Charges, Approval Tickets, Repair/Work-in-Progress, Order Entry, and others. Virtually any customer transaction that can't be handled easily via a standard retail ticket is addressed by the new Special Ticket module. Special Tickets are used when the sales transaction takes place over a period of time — where there is a time lag between the moment the customer orders or obligates for a piece of merchandise, and the moment that the merchandise is picked-up or shipped.

The original methods of Layaway and Special Order (SPO) in StockBoy version 7.1 and earlier (menu options "B" and "D" in the Sales Screen) have been formally RETIRED since July of 1994 -- they are eliminated from StockBoy version 7.2 and from future versions. No new features are being added to StockBoy Version 7.1, but service and support will continue to be available. Please note that there are procedures inside Special Tickets that generate EXACTLY the same bookkeeping and inventory results as the former Layaway and SPO's.

There is a charge for this product upgrade and for the possible conversion of data from Layaways and SPO's to their corresponding type of ticket in Special Tickets .... the exact amount is determined by your StockBoy dealer. In addition, there may be service charges assessed for on-site training time, and for activation of the Preferred Customer System (if it is not already activated). Hard disk storage may also be a factor in your decision to upgrade ... both Special Tickets and Preferred Customer may occupy a great deal of extra storage.

StockBoy's Special Ticket system project was headed by Steffen Bunde with assistance from Dennis Sutton and Bob Baker.

## Immediate Benefits:

Obviously we feel that Special Tickets offer such overwhelming benefits that we have completely eliminated the original version 7.1 methods of handling unique sales register transactions (SPO's and Layaways). Here is a brief list of features:

- ☐ Perpetual accounts. Each customer has a single account for each type of ticket. Ticket line item information is recorded and maintained until manually deleted. For example, it is no longer necessary to have separate accounts for each instance that a customer puts a product on Layaway -- all items for a given customer are recorded on the same ticket. As the customer continues to place items on layaway, the same ticket is re-used and a purchasing history is maintained for that customer.
- ☐ Flexibility. Special Tickets provide mechanisms to handle odd transactions quickly ... like purchasing a product while making a layaway payment on the same ticket ... like picking one item up on layaway while leaving other items on layaway. There are potentially dozens of types of special tickets possible to handle such functions as repairs, layaways, special orders, sales on-approval, temporary charge accounts, order-entry wholesale tickets, in-house assembly tickets, quotations & estimates, etc.
- ☐ Ease of use. The Special Ticket module is relatively easy to use because it is fully prompted on the screen. Most of the operational procedures are identical to the standard StockBoy sales screen, such as <F1> to total & exit, <F6> to re-do ... but keystroke functions are now prompted from strip menus at the bottom of the screen.



The 'visual invoice' appearance of the standard sales screen has been eliminated from the Special Ticket module to allow the program to emphasize step-by-step prompting and the other functions necessary to make a perpetual ticket work smoothly. The movement of the highlighted cursor bar using arrow keys is a major feature on StockBoy's standard retail screen, but the Special Tickets use editing letters (like most other StockBoy programs) ... this promotes a structured flow for novice cashiers and helps guide them through a special ticket correctly. Also, there is absolutely no confusion about whether you're working in a standard retail ticket or in a special ticket -- they look completely different.

☐ Uses existing customer database. The Special Ticket module utilizes the Preferred Customer database to store all customer information. When a customer is input to the Preferred Customer system, his master information is instantly available for all types of Special Tickets without any need to re-input data. The Special Ticket module and the Preferred Customer module share the exact same file for master information ... but each module has its own folio file that independently captures line items from sales tickets. All special ticket line items are captured in the special ticket file, but the capturing of line item data in the Preferred Customer system is controlled by use of the Global Cutoff amount and prompts at the standard sales screen. It is possible to have the same line items captured on BOTH systems during any particular special ticket. A standard sales screen transaction CAN NOT write to a special ticket folio. Every Preferred Customer master record is available for use by Special Tickets. If a customer master file is input from the Special Tickets module, it is written to the PCS and becomes a standard Preferred Customer, too.

☐ Layaways can be booked by payment. The Special Ticket Layaway can be very different from the version 7.1 Layaway. Not only is there just one perpetual ticket for each customer, but the method of performing bookkeeping calculations and inventory deduction can be (at your option) completely different. New Layaways can be 'booked' (revenue recorded and sales tax payable assessed) by the *amount of each payment*. The full revenue and sales tax payable for any given product on layaway are not included in the books until the product has been completely paid for.

*This procedure has NOT been determined to be legal in many states*, so the old method of layaway (all items 100% booked at time of obligation) is included in another special ticket called Temporary Charge. When you stop and think about it, StockBoy's old 7.1 layaway system (and the new Temp Charge) is really nothing more than a temporary charge sale where the product remains in the store as collateral ... other than that, the old layaway is exactly the same as selling products on Accounts Receivable.

☐ Ease of Cancellation. Special tickets can be easily canceled. Several new built-in functions ensure that the inventory count and bookkeeping dollars are handled perfectly ... even when the down payments are retained by the store or when the payments are refunded to the customer. If a refund is involved, the system will automatically prompt the cashier to (1) retain the down payments (or any portion) as store income -- i.e. a non-refundable deposit, (2) refund the down payments (or any portion) to the customer, (3) keep the down payments (or any portion) on the ticket as a pre-paid store credit.

☐ Ease of product addition, deletion, exchange. Since each special ticket is perpetual, (the line items are maintained on the ticket until deleted) it is very easy to add new items, cancel individual items, or exchange items already on the ticket.

☐ Coverage Percentage. The system can be told to report back to the cashier when the sum of the down payments does NOT 'cover' the dollar value of the goods on the special ticket. The coverage percentage can be pre-determined for each type of special ticket. This provides a safe means of allowing customers to pick-up a particular product on layaway prior to the total obligation being fulfilled ... IF they have made the correct amount of down payments to cover.

☐ Price Quotations and Estimates. An Estimate Special Ticket allows the store manager or outside sales person the ability to pre-ring up a ticket for a particular customer, then print it out on a special Estimate form without incurring any bookkeeping or inventory transactions. When the customer accepts the quotation, he can come into the store, pick up the merchandise, and have the ticket ready to total and tender at the sales register.

☐ Order-entry tickets are easier to use and maintain for those StockBoy users who do a lot of 'wholesale' activity and/or mail order business.

☐ Comment lines (those lines without a SKU) are much longer ... now 60 characters long and can automatically be placed one-after-the-other for extended text on a ticket.

☐ Each type of special ticket now has an optional place to put the terms and due date ... this eliminates the old master system option setting and provides more flexibility for each kind of ticket.

☐ Special Pricing Codes. Each Preferred Customer can be assigned a Special Pricing Code (SPC) that determines what price discounts he receives on a special ticket. The SPC categories A-Z define different price strategies for all available GL Revenue account numbers. For example, SPC code "A" could mean a 10% discount on all SKU's using GL acct # 4001, a 15% discount on all SKU's with 4002, and a Cost Plus 15% price for all SKU's with 4003. The price discounting can be done in any of three ways, (1) Retail discounts 'R15'=Retail less 15%, (2) Cost Plus 'C10'=Cost plus 10%, and (3) Gross Margin 'M33'=33% gross margin. If a Preferred Customer has NO SPC code or if he has been assigned an SPC code that has not been defined, the standard Retail price schedules apply.

☐ The version 7.1 use of a Layaway Method of Payment is no longer necessary and it is NOT advisable to keep it on the sales screen. You should delete it at {3-5-2}.

## Trade-Offs:

☐ Training. Yes, there will be a reasonable amount of re-education. The Special Ticket screen does NOT operate exactly like StockBoy's standard sales screen ... it has far more screen prompting, no arrow key cursor movement, and is much more 'step-by-step' oriented. The function keys work basically the same.

Because Special Tickets are very, very flexible, they cannot be 100% structured and must leave plenty of options for the cashier to choose from. At first glance, Special Tickets may appear to require too many decisions ... but we have found that after a brief, un-interrupted get-acquainted session, most cashiers catch on quickly. New cashiers find Special Tickets easier because they have nothing to 'un-learn' ... the longer a cashier has been used to working with StockBoy version 7.1 Layaways and SPO's, the longer it might take to become familiar with the new system.

☐ No Total Ticket Discount. Because the special tickets are perpetual there will be no way to implement the Total Ticket Discount. (line item discounts are fully supported, as are discount-type SKU's) Since the cashier can come back to any ticket at any time and add or delete any product that has not yet been picked up by the customer, the total ticket discount routine would have no way to exclude or include product lines that might have been input from earlier sessions. It would be an accounting nightmare to have the software work this out smoothly.

☐ Payment by Payment type Special Tickets. There can be no NON-TAXABLE SKU's rung up on a Special Ticket that uses the payment-by-payment accounting functions. Special Ticket Layaways may OPTIONALLY use this feature when the system is first initialized, but it is NOT highly recommended!. This only applies to

Special Tickets that calculate sales tax and accounting functions on a payment-by-payment basis (usually Layaways) -- all other Special Tickets can utilize non-taxable SKU's, plus, you can define your Layaways to use standard accounting and eliminate this potential difficulty. Also, there is no possibility for pro-rated Cost of Goods Sold/ Inventory Deduction — whenever the ticket is recorded as a sale, the entire COGS for the product is booked. This could have a negative-appearing impact on your Income Statement. The revenue is only partially recorded but the entire cost of goods is deducted.

☐ No multiple Serialized Inventory input. Selling SI items must be done one item at a time. On the sales register you can input a quantity other than ONE, then have the system prompt you for the serial numbers ... on special tickets you must input quantity one, serial number, and date for each item sold. You can have as many SI items on a Special Ticket as you want.

☐ You must have the Preferred Customer System (PCS) activated. Since the customer look-up for Special Tickets uses the database from the PCS, the PCS must be present. All Special Ticket customers automatically become PCS customers ... but remember that the folio for each system is maintained independently. Also remember that you can disable the Preferred Customer prompt during any sales register transaction by setting the global cutoff amount to 10,000 or greater.

☐ Hard Disk storage. Since all Special Tickets are perpetual, it is possible to gobble up a great deal of hard disk storage using this feature. If you do NOT have the PCS activated and wish to use StockBoy 7.2, you might be involved with storage limitations that would require additional investment in a larger hard drive. You MUST have enough room on your hard drive to support BOTH the new Special Tickets and the Preferred Customer System. Here are some ballpark figures:

Preferred Customers:	1 megabyte per 5,000 names
Preferred Cust Folio:	.5 (½) megabyte per 5,000 entries
Special Tickets:	.6 (6/10) megabyte per 5,000 names
Special Ticket Folio:	.8 (8/20) megabyte per 5,000 entries

Using these estimates, for example, if you left room for 5,000 Preferred Customer Names, with an average of 5 line items per name in the PCS (25,000 total), with 5,000 Special Tickets and an average of 10 lines per ticket (50,000 total), you would need a minimum of 12.1 million bytes of available storage. Keep in mind that it is OPTIONAL whether to save line item details for special tickets inside the Preferred Customer folio. Also remember that if you exceed your original estimates, the system will 'grow' if there is physically enough room on the hard drive; but there will be a small sacrifice in speed due to the fact that the pre-sized files will be fragmented (broken up into multiple physical pieces on the hard drive). Please keep in mind that today's HUGE hard drives cost less than \$200.00 and can give 10 to 50 times the amount of storage you need for very little investment!!

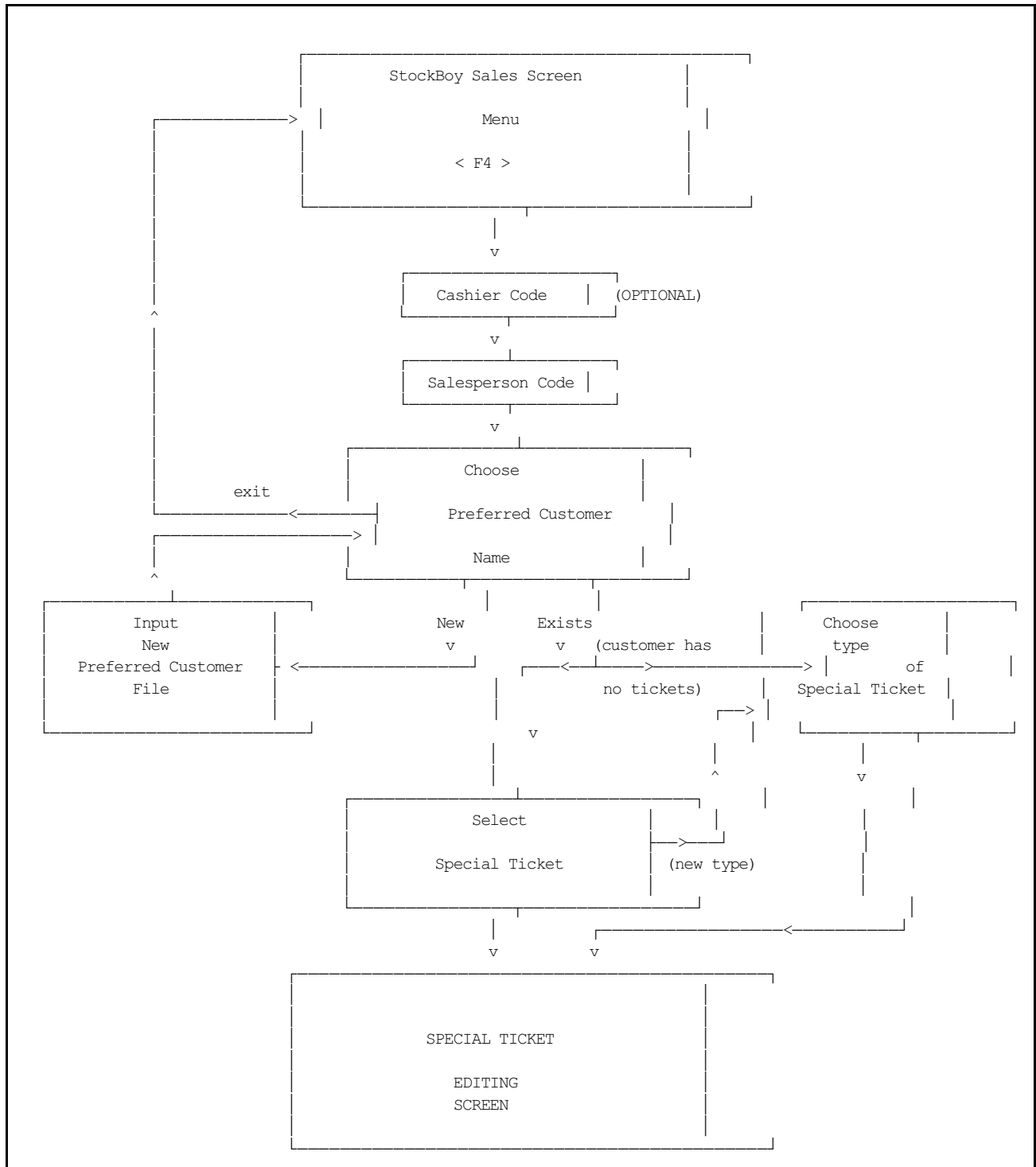
☐ Version 7.1 and 7.2 will continue to be supported for the next few years, even though the vast majority of new StockBoy features and improvements will be added only to Versions 8.0 and later. Whenever practically possible, new features will be added to both 7.2 and to new versions simultaneously, but this **cannot be guaranteed**. End-users may choose NOT to upgrade to Version 7.2 immediately; they still may upgrade at some point in the future without additional financial or support penalty. Version 7.1 is *not* available for sale to new customers and there is no plan to make any modifications other than severe bug fixes!

☐ When you recall a special ticket that has been rung-in earlier, you cannot edit quantities on order for those kinds of tickets where the 'sale' has been recorded at time of obligation. In order to change the price or the quantity on items already booked, the system must force the cashier to delete or void the line, then re-enter it. This keeps all accounting functions 'in sync' and results in balanced End of Days. Those types of tickets that capture the sale at the time of pick-up are, of course, not affected in this way. You cannot line item discount,

set a quantity discount price, price override, or tax exempt an existing on-order amount if the special tickets books the sale at time of order.

## Special Ticket Operation for CASHIERS:

A simplified flow chart is shown below. It indicates the major decision points and the possible routing based on those selections.



#### Access To Special Ticket Module:

To access any Special Ticket, select the 'Special Ticket' option from the standard sales screen services menu. Simply press the <F4> Menu key and then the letter of the Special Ticket option "B".

#### Input Cashier Code (if activated):

If Cashier tracking is activated, the system will prompt for the three character Cashier code, just as in a standard sales screen, although the prompt will be located in the bottom center of the screen. Pressing <ENTER> without typing in a cashier's code will route the operator back to the standard sales screen.

#### Input Salesperson Code:

The system prompts for the salesperson's code, and includes the fourth space to input a password character if appropriate. Pressing <ENTER> without typing in a valid salesperson's code will route the operator back to the beginning of a standard sales ticket.

#### Search for Which Preferred Customer Name:

< \* > = Exit to Sales Screen < # > = Search for Ticket Number

The next step is to pick the customer. Type in the first few characters of the customer's last name, then press <ENTER>. The computer will display a sequential listing of all Preferred Customers whose last name is alphabetically equal to or greater than the characters you input. You can view additional Preferred Customers by pressing the Up or Down arrow keys (lower alphabetically and higher alphabetically). Remember that if the customer's name was not originally input using the automatic alpha code or if it was not input 'last name first', then you might have to search for his/her first name.

Pressing <ENTER> will clear the display and re—ask for the customer's name so that you might search again from a different alphabetical starting point. Pressing the "" <SHIFT 8> asterisk key will exit the Special Ticket module and return you to the standard sales screen.

Pressing "#" <SHIFT 3> for Search for Ticket # will route you to the screen to input any portion of an existing Special Ticket number. The system will scan the Special Ticket database and will prompt you when it encounters any type of partial or whole match ... you can continue the search, view/edit the ticket or quit the search. Note that the ticket number is always 7 characters long plus a maximum of three characters for the Salesperson's code. On a finished transaction, the ticket number is 7 digits long ... on a Special Ticket in progress, the ticket number comprises three letters and four numbers. The first three characters of the Special Ticket type are used for the first three characters of the active ticket number. When searching for a ticket, input as much of the ticket number as you can ... if you input a "4" for example, all tickets with a "4" anywhere in the number will be accessed (potentially a lot of tickets to 'continued' through); but if you input "4321", only tickets with "4321" will be accessed ... a much smaller group to examine. Keep in mind that the system is NOT cross—indexed by ticket number, so a search will have to scan each folio entry in your Special Ticket database ... this could take a few minutes on slower systems with lots of line items.

#### Lookup Preferred Customer Name:

< N > = Input New Name to PCS < Arrow Keys > < ENTER > = Exit

Pressing the line letter alongside a customer's name will direct you to the Choose Special Ticket Screen. Otherwise you can use the up and down arrow keys to view other customer names, you may press <ENTER> to get back to the Search for Preferred Customer prompt, or you may press "N" to route you to the screen(s) where you can input a new Preferred Customer record.

### Select Existing Special Ticket:

There are two possibilities here: (1) If your chosen customer already has special tickets on file, you will see a complete list of them on the screen ... (2) if the customer has never had a special ticket you will be routed to a screen that shows you all of the types of special tickets that are available.

- (1) You are shown a complete listing of all special tickets that the selected customer already has on file. You may pick the line letter alongside any existing special ticket to immediately access that ticket. This is used when you are recalling a ticket to make additions, take payments, or to examine it, etc. Once you pick an existing ticket, the screen immediately shows you the Special Ticket editing screen.

You may also choose "N" for New Special Ticket Type. This indicates that the customer already has at least one kind of special ticket on file, but you wish to setup another type of ticket for the same customer. For example, Mr. Jones may already have a Layaway on file, but now is wanting to special order a new product not currently in stock. You would select "N" and then pick the "S" – Special Order ticket to create a new Special Order account. see #2 below.

You may also press "\*" to Edit the Customer master file or press <ENTER> to leave this screen and go back to the Select Preferred Customer screens.

- (2) You are shown a listing of all special ticket types available. The first letter of each special ticket name is the letter you use to select that type of ticket. Once you select a ticket type, the account is automatically setup and you are routed directly to the Special Ticket editing screen. Press <ENTER> without selecting a special ticket type to route back to the Select Preferred Customer screen. You may also select "\*" to Edit the Preferred Customer master file for your chosen customer. (note: This is a restricted access; and is designed to ONLY edit the selected Preferred Customer file. From here, you cannot edit or select any other Preferred Customer, or perform any other PCS function!)

Note that if a line letter is blinking, it means that this customer has that kind of a ticket already setup. If you select a non-blinking option, the system will create a new special ticket account for the customer you have selected.

*Your company policies will determine what type of special ticket to select under which circumstances. Since the names of the Special Tickets can be determined by your system manager, we cannot provide an accurate listing in this manual.*

## Special Ticket Editing Screen:

[illegible]

This is the basic layout of the Special Ticket Editing Screen ... it shows two sample SKU's on order. The Preferred Customer information is displayed in the upper left corner of the screen, and the ticket type will be blinking in the center top portion of the screen in between the \*\*\*\* and above the dotted line.

NOTE: There are two basic screen layouts — (1) shown above, has more detail regarding the customer and therefore less number of SKU lines on display at any one time, and (2) a screen with abbreviated customer information and many more SKU lines on the screen. Use "A" for Change Display to alternate between these two displays for your personal preference.

Notice that there are two quantity columns on the screen, one called ORDERED and the other PICKED UP. That's the entire reason for Special Tickets ... to keep track of sales where there is a time delay between the moment a customer obligates or orders a product, and the time the customer actually picks it up and leaves the store. In theory, you could perform all standard retail sales on the Special Ticket screen ... simply enter the ordered quantity and the picked-up quantity at the same time.

The use of the 'Ordered' and 'Picked-up' columns are easy to understand for most special tickets such as Special Orders. But for other types of tickets we often refer to Ordered as 'Obligated' and Picked-up as 'PAID FOR'. In a Layaway, for example, the customer chooses a product in your store and is OBLIGATED to pay for it when you mark



a quantity in the Ordered column. When the goods are finally PAID FOR you mark the quantity in the Picked-up column to show that the transaction for that line item is completely finished. The computer doesn't 'care' whether or not the actual product is on your store's layaway shelf or not ... the SKU has been obligated for and is removed from the electronic inventory so that future purchase orders will replace it.

One of the benefits of Special Tickets is that you, the Cashier, do not have to make any decisions regarding how the system handles inventory or accounting ... those functions have already been setup by the system managers. Each type of Special Ticket may handle these functions differently, but the operator doesn't have to worry about what's going on behind the scenes.

All Special Tickets are perpetual. This means that once you set up a ticket for a customer, it can remain in the system forever (until a system manager decides to delete it). This also means that since the folio (the individual line items) are recorded and maintained forever; you now have a complete history of all transactions for a given customer on a given type of ticket. For example, if Mr. Jones comes in for a new layaway, all of his previous layaway activity is available for you to see on the Special Ticket screen (subject to that data being purged by your system manager, of course). There is no need to set up a new layaway account for Mr. Jones. But don't worry, all his old finished transactions do NOT immediately appear on the screen to confuse you ... they are hidden ... you must ask the computer to show them to you by using the <PG UP> key. The date, salesperson, and ticket number are recorded in the folio for all finished transactions, which is very handy for your reference when settling small disputes or clarifying charges to the customer. These folio lines (representing older, finished transactions) are highlighted in reverse video so that you can easily distinguish them from current folio lines. A "<PG UP>" reminder message is shown in the center of the dashed line ONLY IF there are additional transactions available to be seen by pressing the <PG UP> key.

Items that have been paid for (Picked-up column equals the Ordered column) are kept by the computer but are NOT editable by the cashier. Just as in a standard sales ticket, once the transaction is finished, it's finished! You can, of course, run a refund ticket to adjust any transaction shown in the history of a special ticket. Your system manager might recommend that you do a refund on a special ticket if the original sale was on a special ticket ... that way you'll be able to trace the history of the transactions all in the same folio.

Special tickets work the same way forwards and backwards ... sales and refunds ... positive quantities and negative quantities.

Remember that there is a separate folio for each customer for each type of Special Ticket. Mr. Jones' layaway transactions will NEVER appear in his Special Order ticket (even if you want them to for some reason). Also remember that once Mr. Jones' name is put in the Preferred Customer database, it never needs to be added again ... all the Special Tickets use the same data base of names so you never have to repeat the input of a customer's master file data.

When you edit/change a customer's master file, that change takes affect for all his special tickets and preferred customer screens instantly. You cannot have master information for a customer on one type of special ticket and have different information for another type of ticket. You would have to build two distinct Preferred Customer master files for the same individual — remember, the names must be slightly different — the computer will NOT accept a duplicate name.

There are three totals that appear in the upper right section of the screen if you select (via ChAnge Display). TOTAL PAYMENTS: This shows the total of payments on the special ticket that have not been used to pick-up items. In a refund situation, this total shows you the maximum amount that could be returned to the customer. TOTAL PICKED-UP: This total represents the total extension of items that have been selected to be picked-up during this ticket session. Items are marked for pick-up by placing a non-zero number in the Picked-up column. TOTAL ORDERED: This total shows the value of all active items in the Ordered column.

## The Special Ticket Strip Menu:

If you are entering a Special Ticket that has a zero balance, you will be routed automatically to the input new SKU prompt (just as though you had pressed <ENTER> at the strip menu prompt, described below) ... otherwise you will arrive at the strip menu prompt. The strip menu at the bottom of the screen is seeking a one character input, but there are a few special function keys that will also work when the screen is at the strip menu.

- <F1> The 'TOTAL' key works very much the same as it does in the standard sales screen ... it advances the program to the next logical sequence. When the <F1> is pressed at the strip menu prompt, it will route the program to the next step: method of payment (if new activity was made on the screen), or back to the customer name selection (if nothing new happened).
- <PG UP> The Page Up key will re-display the line item section of the ticket starting with older dated folio entries. If the entries appear in reverse video (black letters on white/amber/green background), then those SKU's have been completely sold and may be purged by the system manager.  
NOTE: The dotted line will show "—— Pg Up ——" if there are old folio entries for this special ticket that are not displayed on the screen. If you don't see the Pg Up display, there is no need to push the Pg Up key!
- <PG DN> Page Down will re-display the line item section of the special ticket editing screen, starting with newer folio entries. The PG UP key goes 'back' in time while PG DN goes forward.
- <UP arrow>  
<DN arrow> The arrow keys will step you back and forth one line at a time, whereas the <PG UP> and <PG DN> keys step in groups of lines.
- <ESC><ESC> Voids any changes to the Special Ticket (excepting changes to the customer's master file information) that were made during the current session. The ticket remains the same as when it was first accessed.

Now let's step through each of the strip menu's possible answers:

"A" – Change Display: As described above, pressing "A" will select the alternate screen display. One display shows more information about the customer and less folio lines, the other display format shows minimal customer information with lots more folio lines. The system works identically either way, but it defaults to the display with more folio lines when you first come to the Special Ticket editor screen.

"C" – Cancel Ticket: This option allows you to quickly cancel the entire special ticket ... any items already picked-up are NOT affected, of course. Every line item that is still in the Ordered column will be canceled ... if you need to cancel only a portion of the active line items, use the VOID option described below.

When you cancel a ticket, the system prompts you on a step-by-step basis. By correctly answering the prompts you can perform the following tasks: (1) retain deposit money for the store as a non-refundable down payment, (2) refund the customer's deposit money, (3) keep deposit money on the ticket as 'store credit', (4) all possible combinations of the above.

"Enter Amount of TOTAL PAYMENTS to be kept by Store".

"Total on Order: \$xxxxxx"

"Enter \$ as positive number or 'xx%' to calculate % of Total on Order"

The prompt defaults to the amount that represents the smaller of the down payment coverage percentage or the minimum dollar figure for down payments. This is the amount of money that

the store will keep if the special ticket is canceled. You may enter any amount less than the Total Payments.

If you input a number followed by the '%' percent sign, the system will calculate that percentage against the Total on Order and will re-prompt with the calculated dollar figure as the new default amount.

If you input a dollar figure LESS than the Total of Payments, the system will continue on to the next prompt:

"Enter Amount of Total Payments to REFUND to Customer". The remaining down payment not kept by the store is the default amount. If you input an amount less than the default, the system will automatically place the remainder as a pre-paid store credit on the Special Ticket folio. The next time you call up this ticket, there will be a credit (negative) balance.

Next you will see the familiar tendering screen which shows all possible methods of tendering the refund (if there was one).

"E" – Edit Line: This strip menu option allows you to pick out an existing SKU line and change the data on it. When you press "E", the system will display a vertical list of line letters from which you pick the SKU line to edit. If the system cannot allow you to edit a line, there will be no letter alongside that line.

Once you pick a line, you are prompted through each of the line's components, SKU, Description, quantity on order, quantity picked-up, and price. The price prompt is subject to system manager restrictions on price override and discounting. If special percentage pricing is allowed (using the 'C"M"R"Q' variables), they will function during the price prompt just as they do from the fourth column in the standard sales screen. Once inside this editing sequence you may press the <F2> key to put up a line item discount (either by dollar figure or by percentage), or the <F3> key to switch between taxable and non-taxable (NOT on Layaway-type tickets)

There are certain types of tickets where the system cannot allow you to edit a line. These tickets 'book' the sale at the time the SKU is placed in the ORDERED column and would generate a very difficult bookkeeping entry if the system allowed you to edit. If you attempt to edit a line on this type of ticket, a screen message will appear and block your attempt. Your only option is to VOID the line — then re-input it.

""I" – Insert Line: This function allows you to specifically place a new line on a special ticket, rather than just add a new line to the bottom of the ticket. It is designed for use when a comment line needs to be input just below a standard SKU line which the comment refers to. (a comment line is a line without a SKU ... comments are saved in the special ticket folio but have no calculation value)

"K" – Pick-up: The "K" key is the way to mark a SKU line as being Picked-up. When the option is chosen, the screen will display a list of line letters ... simply type in the line letter or letters that you want filled and the system will set the Picked-up quantity equal to the Ordered quantity. You may enter "\*" to pick-up ALL items on the Special Ticket, or you may enter as many or as few of the line letters as you wish.

"M" – Comment: A comment is simply a series of text lines that can be inserted into any position on any special ticket. The text can contain any information that you wish to have recorded inside the special ticket for future reference. Early versions of Special Tickets (and those for THEOS 3.x versions) have a line-by-line editor – later versions (since fall of 1997) have a pop up window that allows you to enter up to 18 lines of free-form text.

"T" – Reprint Ticket: This option takes you to a prompt where you may choose to reprint the existing active items on the special ticket or where you may print the complete history of the ticket. This function does NOT change any details or dollar figures.

"S" – Save & Exit: Very similar to pressing <F1> at the strip menu. If any edits or additions were made to the ticket that created a change in its value, the <F1> or "S" key will route you to the Additional Down payment prompt and to the Method of Payment tendering screen. There is one subtle difference between the <F1> and the "S" keys — the "S" will NOT automatically print a receipt if there was no changes to the ticket that resulted in an amount being tendered. This is handy if you want to add a comment to the ticket, yet do not wish to have a receipt printed. You could also place a SKU on the ticket but not take any additional down payment or amount to tender (useful in a repair ticket scenario)

When you use "S", you can still get a printed receipt even if there is no tendering to account for. The re-print ticket message at the bottom of the screen will be the next thing to pop up — you have 20 seconds to press the 'T' key for ticket re-print, or press the <ENTER> key to forget the reprint.

"V" – Void Line: When the "V" is pressed, the screen displays a vertical listing of line letters – note that not all lines on a special ticket may be voided (deleted). When you pick a line letter, that line is voided. All bookkeeping and inventory considerations are automatically handled. Voiding is identical to "C" Cancel, except that void works for one line at a time, while "C" Cancel effectively voids every active line on a special ticket. After a void or series of voids, you are prompted for the series of refund questions ... see "C" Cancel above.

<ENTER>=Add SKU: Pressing the <ENTER> key routes you to a prompt that displays, "Enter SKU". Here, you may enter a SKU number (or UPC code if UPC is activated) just like you do on the standard sales screen. Adding a SKU automatically places the SKU line at the bottom of the special ticket. You are prompted for additional information for the SKU line including description, Ordered quantity, and selling price. If special percentage pricing is allowed (using the 'C"M"R"Q' variables), they will function during the price prompt just as they do from the fourth column in the standard sales screen. Once inside this SKU line input sequence you may press the <F2> key to put up a line item discount (either by dollar figure or by percentage), or the <F3> key to switch between taxable and non-taxable (except on Layaway-type tickets). During the Price prompt, price override and discount restrictions may apply.

The following prompts appear on your screen following <F1> or "S"ave & Exit if the Special Ticket's value was changed in any way.

Terms and Due Date:

If your system manager has setup the Special Ticket accordingly, your next prompt might be to input a line of text regarding the TERMS. There will most likely be a 'default' answer — so follow your company policy and either accept the default or input new terms. The TERMS information will be printed on the Special Ticket receipt and will be stored in the Special Ticket folio.

If your system manager has activated it, you might be prompted to input the due date for this ticket. You may input either a date in MM/DD/YY format, or a number that represents the number of days from today. Under specific circumstances the default due date may be calculated by the system automatically — if the TERMS default information contains a valid date (such as '05/25/96') or if it contains a valid number followed by 'DAYS' (such as '90 DAYS'), then this information will be used to generate the due date default.

Enter Additional Down payment:

**Every ticket will prompt for this Additional Down payment!** Depending upon the type of ticket and the way the ticket has been designed by your System Manager, the default amount might be zero ... or it might be any other positive amount. Even if you do not expect to receive another down payment from the customer, this prompt will appear. It gives you the opportunity (the only opportunity) to accept multiple payments on one ticket (such as layaway installments).

If there is a non-zero amount in the default — that represents the COVERAGE AMOUNT. The Coverage Amount is a certain percentage that each special ticket type must have in total deposits to 'cover' the amount of product that is on ORDER. You'll also see a message at the bottom of the screen, "\$7.23 = Coverage". Subject to your company policies, you should enter a dollar figure for Additional Payment that will equal or exceed the defaulted coverage amount. The Additional Payments are recorded in the folio of the Special Ticket.

For example: Your customer picks-up \$20.00 worth of goods and has \$50.00 still on order. Your sales tax rate is 5% and you have a 10% coverage requirement. The default amount for the Additional Payment prompt would be \$5.00 (10% of \$50.00) provided the customer has no amount ALREADY deposited. This \$5.00 represents only the Coverage Amount and **is not the full amount that the customer needs to tender!**

The computer will automatically calculate the correct default amount for the Additional Payment prompt. In the vast majority of scenarios, the cashier should just hit the <ENTER> key to accept the default. Here are two situations where the default is NOT appropriate ... (1) the customer wishes to put more money 'down' on his ticket (usually in a layaway situation) and has not purchased anything else nor does he want to pick up any SKU's on the ticket. Since there is no SU activity, the Additional Down payment prompt defaults to zero — you should type in the amount that the customer wishes to place on the ticket. (2) you need to over (or under) charge the customer above the coverage percentage. If you need a higher (or lower) deposit than the coverage or default percentage would normally suggest, then you must override the default at the Additional Down payment prompt.

Remember: the Additional Down payment prompt is where you input the amount of money that is going to be saved to the ticket. This amount is independent of the amount that you will need if a customer is going to pick up an item. If you have a ticket where there is both ordering and picking up, the amount tendered will automatically include the Additional Down payment and the amount needed to pickup the item including tax. The Additional Down payment prompt only shows what amount of money is required to save to the ticket to 'cover' the total of goods still left on order.

If a ticket is fully picked-up, you will not see the Additional Down payment prompt. Depending upon how your special tickets were setup by your manager, you might see the term 'DEPOSIT' as opposed to 'DOWN PAYMENT' — for sales purposes the terms are exactly the same and they have no differences in how the special tickets function.

#### **Payoff Amount:**

At the bottom of the screen, below the Additional Down payment prompt, you will see something like, \$7.23 = Pay off Ticket. This shows you the amount that would have to be tendered in order for the customer to completely pay off his obligation of Ordered items, including sales tax. If you input this number for Additional Payment, and follow through with the Method of Payment (described below), then this ticket will have a zero outstanding balance and will be shown as paid in full. When the customer comes back to pick-up the items, the system will not demand any more money for these items.

You can also inform your customer of what the total obligation of the ticket is, by pointing out this Payoff Amount to him.

#### **Method of Payment Prompt:**

The nine possible MOP's are displayed next. Just as in the standard sales screen, you select which MOP and then enter the amount. It is possible to have multiple MOP's for any given special ticket.

The "Total" shown in the lower right corner of the screen is the total amount that the customer should tender, it includes any additional down payment, an amount to meet the coverage requirements, and any money required to pay for items that were just picked-up (plus sales tax).

It's easy! Just as in the standard sales screen, you ask the customer for the amount shown as TOTAL at the bottom right hand corner of the screen. You can be assured that this total will include everything you need to get from the customer ... the coverage down payment (if any), any additional down payments, any amount for picked-up items, and sales tax. In our example above, the TOTAL will show \$26.00 (\$20.00 for the picked-up items, \$1.00 for sales tax, \$5.00 for the coverage amount).

#### **Preferred Customer Prompt:**

If the current activity on the special ticket meets the criteria for writing to the Preferred Customer folio, then you will see a prompt, "Write to Preferred Customer Files?". There is a means by which your system manager can eliminate this prompt. The default "Y" or "N" depends upon a Global Cutoff amount that is setup by your system manager. If the ticket is large enough, you will see a "Y" default, otherwise you get an "N". Regardless of the default answer, if you answer "Y" the special ticket items will be written to the Preferred Customer folios, otherwise not.

#### **Ticket Reprints:**

When the ticket is finalized and the customer receipt is printed, you will see the reprint prompt, "Ticket, All on Order, History <ENTER>=No reprint." "T" for ticket simply re-prints one copy of the ticket that just ran. "A" prints all items still in the Ordered Column but not Picked-up ... this is a good thing to print to show the customer his future obligations and what your computer shows he still has on the special ticket. "H" prints the history ... the entire folio, exactly like the "H" – Print History option from the strip menu.

#### **Calculator**

With StockBoy version 8.0 and THEOS version 4.0 the Special Ticket editing screen has a built-in calculator that is identical to the one used in the main sales screen. Press the <TAB> key to pop up the calculator, then use the <TAB> again to paste the Grand Total answer back into your sales screen after you have made the appropriate calculations. The calculator works like a standard, simple, calculator (not an adding machine) using familiar mathematical stream logic ...  $5+5=10$   $7-2=5$   $8*2+1=17$   $20/5*2+4=12$ . The <ENTER> key forces the total, while the '/' '\*' '-' and '+' keys provide the necessary mathematical functions. The answer is pasted into the input field prompt that is active at the time you pressed the <TAB> key to start the calculator. Therefore, if you want to make a calculation involving a price, step through the software to get to the price prompt, press <TAB>, make your calculations in the pop-up calculator, then press <TAB> to paste the GT answer into the price input field.

## Special Ticket Operation for System Managers:

Maintenance: Special Ticket maintenance is accessed by pressing <CTRL U> from the salesperson prompt inside Special Tickets. At the maintenance screen you may create new types of tickets, execute master reports, purge unwanted data, etc.

<CTRL R> at the salesperson prompt removes any discount or price override restrictions for the ensuing ticket. Restrictions are back in place after the ticket prints (this is exactly like the standard sales screen).

<CTRL C> at the salesperson prompt routes you to the standard Preferred Customer Maintenance program, exactly as it does in the standard sales screen. This access is different than the access available when you use the '< \* > = Edit Customer File' from the Ticket Type selection screen. The "\*" allows editing of the one selected Preferred Customer file ONLY... and does NOT allow the operator to access any other PCS menus or functions! If you don't want your cashiers 'wandering' around inside the PCS, then do NOT instruct them on the use of <CTRL C>!

### OPTIONS:

There are several global special ticket options accessible from the Special Tickets menu. (Remember ... to access the menu, press <CTRL U> at the salesperson code prompt from inside the special ticket program.) From here you may choose several very important options on how the special ticket software works!

1. Utilize prior payments when doing a partial pickup. Do you want the system to utilize pre-existing downpayments or deposits when determining how much money is required for a customer to pick up some of the merchandise on the special ticket? If you do NOT allow this, the system will try to keep any prior payments on the ticket and will not automatically use a portion of them to 'pay for' items being picked up. The <CTRL P> option still applies in this case. <CTRL P> allows you to temporarily override the system definition of NOT allowing the use of prior payments for this one time – you can then use prior payments to help pay for items being picked up during this one transaction. If you tell the system to utilize prior payments, there is NO way to force the system to keep their original payments in tact.

Please remember that no matter which option you use, the Coverage PerCentage feature is still in effect. This option only determines whether or not the system allows use of the prior payments as payment for items being picked up. This scenario can only occur when doing a PARTIAL PICKUP – still leaving some SKU's on order.

Why do many StockBoy merchants NOT allow use of prior payments? Take the example where a store manager sets up a special ticket for a customer he does not know for a product he does not want to stock (making it a somewhat risky special order). The store manager could assess a larger-than-normal downpayment (even 100%) to provide additional security deposit. Should that customer come back later, add some other SKUs to his ticket, then pick those SKUs up (still leaving the original 'risky' SKU on the ticket), the large original downpayment COULD be used to pay for the picked up items. If the remainder of the deposit after paying for the picked up items, is still larger than the Coverage requirement, the system will allow it. And yet the ticket does NOT have the amount of special downpayment that the store manager originally wanted.

2. Stay inside the special tickets program without going back to standard sales screen. If your operation uses special tickets the majority of the time, then select this option; otherwise let the system return to the main sales screen after each special ticket is rung up. You can always get to the main sales screen regardless of which option you choose.

3. You can designate which special ticket screen format is used automatically when you access a special ticket. There are two formats (selected by the "A" key at the strip menu) ... one displays more information about the customer, the other displays more SKU lines.

*The following section is designed to be read by system managers and accounting personnel. It is highly technical regarding how the software places special ticket data in the bookkeeping system and how & when inventory quantities are deducted. Many companies have found that this information burdens their cashiers with extra information they do not really need.*

The concept of Special Tickets is really quite simple, but the programming considerations are very complex. It is important to understand that Special Tickets involve two steps ... Obligation and Pick-Up. Obligation occurs when a customer makes a promise to purchase and that promise is recorded in the 'Ordered' quantity column of a Special Ticket. The second step is Pick-Up ... where the customer physically picks-up the merchandise and leaves the store with it. In this case, the cashier makes an entry in the Pick-Up quantity column of the screen and finalizes the ticket. The Ordered and Pick-Up columns are very similar to StockBoy's purchase orders.

In addition to the two steps described above, there are two data functions that must be recorded sometime during the life of a Special Ticket ... Booking and Inventory Deduction. Booking a ticket means that the revenue, sales tax payable, commissions, and salesman sales history are recorded to the various files. Inventory Deduction involves changing the quantity on hand and recording the Cost of Goods Sold/Inventory Deduction in the accounting system (if activated).

All Special Tickets, therefore, can be defined by two questions with two possible answers to each.

**Question 1:** *When is the ticket a sale?* (when are revenues, taxes, commissions recorded?)

- A: At time of order or obligation
- B: At time of pickup by customer
- (C): Layaway Only (booked by percentage of payments)

**Question 2:** *When is the quantity on hand deducted from the perpetual inventory count and the corresponding COGS/Inventory deduction posted?* (if activated)

- A: At time of order or obligation
- B: At time of pickup by customer

That leaves us with four possible combinations to define our Special Tickets 1A-2A, 1A-2B, 1B-2A, 1B-2B. However, there is a third possibility that applies only to Special Ticket Layaways ... at time of obligation the ticket is booked by that percentage paid, not by the entire ticket amount (1C).

Let's explore the details behind each primary type of Special Ticket:

Special Order	1B-2B Revenue/Tax/Commission/Sale at pick-up by total ticket amount, Inventory Deduction/COGS/quantity deduct at pickup. When the products are ordered no booking or inventory deduction happens. A down payment is optionally accepted and the money is booked into CASH (via tendering) and a special holding account for SPO Deposits (user definable). Merchandise is ordered by the store, and the deposits are generally classified as liabilities because they are subject to refund if the product cannot be brought it.
Layaway	1C-2B Revenue/Tax/Commission/Sale by payment and prorating, Inventory Deduction/COGS/quantity deduct at time of order. Merchandise is in building held as collateral, but the quantity on hand is deducted to allow for the proper re-ordering of inventory ... the goods are committed and should be considered sold. The revenue and taxation is handled on a percentage basis ... if the down payment was 10% of the total price, only 10% of the appropriate revenue account (as determined by the product's GL code in the inventory record), and 10% of the sales tax payable is booked. The remaining revenue (90%) is placed in a user-definable 'Pending Revenue' account. Each down payment accepted during a layaway is automatically back figured for taxation ... if a customer pays \$20.00 and you have a 5% tax rate, then \$19.05 is applied to the product's revenue account and \$0.95 is applied to sales tax payable.



Temp Charge	1A-2A Revenue/Tax/Commission/Sale at order by total ticket amount, w/collateral; Inventory Deduction/COGS/quantity deduct at time of order. This is the Version 7.1 Layaway. Merchandise remains in building, but quantity is deducted to allow for proper re-ordering. Exactly the same as an A/R ticket except that there is no billing, no new account set up in Bookkeeping, and the merchandise does not leave the store until it is paid for.
Assembly/Repair	1B-2A Revenue/Tax/Commission/Sale at pickup by total ticket amount, Inventory Deduction/COGS/quantity deduct at time of order to allow for proper re-ordering during the course of preparing the merchandise for sale. Merchandise is in building but is no longer available for sale ... it is probably attached to or included in some other piece of finished goods for ultimate sale to the customer. Workers call up the ticket as they utilize a product during the assembly or repair process and register it in the ticket on an as-you-go basis. When the product is completed, the ticket is ready to be sold by the cashier.
Approval	1B-2A Revenue/Tax/Commission/Sale at pickup by total ticket amount, Inventory Deduction/COGS/quantity deduct at time of order. Merchandise is temporarily out of the building, but not expected to be returned. In effect, this is a no-collateral charge sale.
Gift Certificate	1B-2A Revenue/Tax/Commission/Sale at pickup by total ticket amount, Inventory Deduction/COGS/quantity deduct at time of order. Gift Certificates and store credits can be tracked simply by starting the ticket with a payment ... this generates a credit balance. Any subsequent purchases applied to this ticket will reduce the amount of the credit ... and if the customer picks up a product that exceeds his credit (gift certificate), the system will properly ask for an additional amount to tender. The perpetual nature of the special ticket allows you to accurately track all such store credits and/or gift certificates as a customer service.
Order/Entry	1B-2A Revenue/Tax/Commission/Sale at pickup by total ticket amount, Inventory Deduction/COGS/quantity deduct at time of order. Merchandise is usually in building, on sales floor and needs to be gathered by employees and set aside for the customer to pick up later. The quantity is committed and has already been deducted at point of order since it is not readily available for sale.
Return Ticket	1B-2A (delayed refund) Revenue/Tax/Commission/Sale at pickup by total ticket amount, Inventory Deduction/COGS/quantity deduct at time of order. All figures are negative. This allows the product to come back into the inventory when the customer 'orders' the refund, but no monetary refund or store credit is given until 'pick-up' time ... when the credit/refund has been determined by management or by the manufacturer and the customer comes back to the store.
Estimate	1B-2B (quotation or pre-rung ticket) Revenue/Tax/Commission/Sale at pick-up by total ticket amount, Inventory Deduction/COGS/quantity deduct at pickup by total ticket amount. No booking or inventory deduction at time of ticket input. This ticket is like a suspended ticket ... nothing happens until it is called up and sold. It can be used to pre-ring sales so that the customer is guaranteed specific prices when they come into the store. It's just like a Special Order with no deposit.

For the bookkeeping minded reader, let's explore a sample Special Order and new Layaway. Let's assume we have a customer that obligates for a \$100.00 item with a 5% sales tax. The four digit GL numbers are just for reference and may not match account numbers you are using.

Special Order	Revenue/Tax/Commission/Sale at pick-up by total ticket amount
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Inventory Deduction/COGS/quantity deduct at pickup

Special Order	100.00	(book value 50.00)
Tax	5.00	
Total Obligation	105.00	
Deposit	20.00	

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1001 Cash	20.00	D (ticket balance 85.00)
2300 SPO Deposits	20.00	C (liability or contra asset)

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PickUp Item		
Final Payment	85.00	

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1001 Cash	85.00	D
2300 SPO Deposit	20.00	D (sum of all deposits not applied)
4001 Revenue	100.00	C
2100 Sales Tax	5.00	C

5001 COGS	50.00	D
1500 Inventory	50.00	C

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Layaway: Revenue/Tax/Commission/Sale by payment (PAYMENT BY PAYMENT!)  
Inventory Deduction/COGS/quantity deduct at order

Purchase	100.00	(book value 50.00)
Total Oblig	105.00	
DPayment	20.00	

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4001 Revenue	100.00	C (lay balance is 85.00)
1499 Pending	-80.95	D (dp = 19.05 + .95 tax back figured) net rev=19.05
1001 Cash	20.00	D
2200 Sales Tax	.95	C

5001 COGS	50.00	D
1500 Inventory	50.00	C

---

Additional Payment 30.00

1001 Cash	30.00	D (lay balance is 55.00)
1499 Pending	28.57	C (pending is 52.38, net revenue is 47.62)
2200 Sales Tax	1.43	C

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Final Payment	55.00	
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1001 Cash	55.00	D (lay balance is zero)
1499 Pending	52.38	C (pending is zero, net revenue is 100.00)
2200 Sales Tax	2.62	C

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Net revenue is \$100.00  
Sum of sales tax is \$5.00  
Pending is \$0.00  
cash sum is \$105.00

layaway balance is \$0.00

tax backfigure percentage =  $1.0/(1.0+\text{RatePerCentage})$  i.e. .9523809 for .05, .9433962 for .06

With layaways you must always keep in mind that while they are in progress, revenue lags behind cost of goods sold for each SKU's revenue/COGS accounts. (you have written off the cost but only recorded the down payment percentage of the sale in the SKU's proper revenue account). The Pending Revenue account captures that part of the revenue that has not been paid for so, that your total income statement is correct. Sales Tax payable only matches the true revenue accounts and does not reflect the Pending Revenue account dollar figure. With layaways, profit is understated proportionally to the balance of Pending Revenue.

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