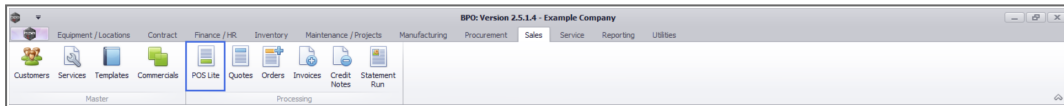# SALES

POS LITE – ADD POINT OF SALE (POS) INVOICE

The point of sale (POS) feature enables a Customers to do sales transactions or process payments for products where the Customer has a stock outlet facility to the public. Using the point of sale feature will normally apply to C-Class stock items but may include A-Class and B-Class stock as well.

Ribbon Access: *Sales > POS Lite*

1. The *Invoices* listing screen will be displayed.
2. From here you can view a list of all the *Cash Sale Invoices* that have been processed.
3. Click on *Add*.

Short cut key: *Right click* to display the *Process* menu list. Click on *Add*.

4. The *New Transaction* screen will display.

INVOICE HEADER INFORMATION

- *Account Code:* This field will populate by default based on the Customer Account configured in the Sales Office, which should ideally be a Cash Sale Customer.
    - Click on the down *arrow* to display the *Account Code* menu.
        - ○ Select an alternative customer code from this list, if a specific customer is being invoiced.

- **Customer Name:** If an account code for a customer was selected, then the customer name will auto populate, alternatively if this is a walk in customer - type a customer name.

- **Contact Name:** If an account code for a customer was selected, then this field will be populated with the name of the contact person for the Customer, alternatively if this is a walk in customer - type the name of the contact person.

- **VAT No:** This field will populate with the VAT number linked to the customer if a Customer Code was selected, alternatively type in the VAT number if required.

- **Invoice Date and Time:** These fields will auto populate with the current date and time the invoice was created.

  - **Invoice Date:** Type in or click on the drop-down **arrow** to use the calendar function to select an alternative date, if required.

  - **Invoice Time:** Type in or use the **arrow** indicators to select an alternative time, if required.

- **Order No:** Click in the field to type in the order number if an order is linked to the cash sales invoice.

- **Billing Address:** If a Customer Code was selected, then the billing address will populate with the address linked to the customer, alternatively type in a billing address for the customer.
- **Postal Code:** The postal code will populate with the Postal Code liked to the Customer Code selected, alternatively type the postal code for the customer.
- **Salesman:** The salesman field will populate with the employee currently logged onto the system. Click on the drop-down *arrow* to select a different salesman, if required.

ADD ITEMS TO THE INVOICE

Item Code, Stock Codes and Part Number

5. Click in the *Item Code* text box to display the down arrow.
6. Click on the down **arrow** to display a list of **stock codes** specific to the POS Auto Issue warehouse on the drop down menu.
7. Select the required **part number** from the list.
   - The example has item **2020-147K** selected.

BATCH SERIAL NUMBER

This field serves **two** purposes depending on the **part type**:

- *Batch Number selection* for **C-class** (or non-serialised stock items). Note that this is only required for Batch Tracking environments where multiple stock batch exist.
- *Serial Number selection* for **A-class** and **B-class** (or serialised stock items). This applies to all environments.

Batch Tracking environment for C-Class items

The example explains the process for batch tracking environments for C-class items.
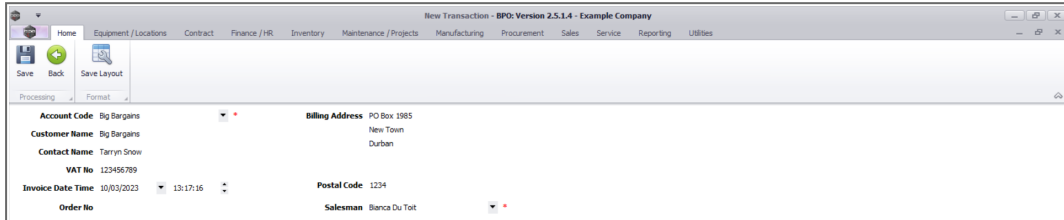
8. The *Item Type*, *Item Code* and *Invoice Line Description* fields will populate according to the *Item Code* selected above.
9. **Batch Serial No:** If your system is configured for *Batch Tracking C-Class items*, and you are invoicing a *non-serialised* item, then you will need to select the stock batch that you are issuing from the *Batch Serial No* column.
    i. Click in the *Batch Serial No* field to display a down **arrow**.
    ii. The *Batch Serial No* drop-down menu will display.
    iii. Select the *batch number* from which you wish to issue this stock item.
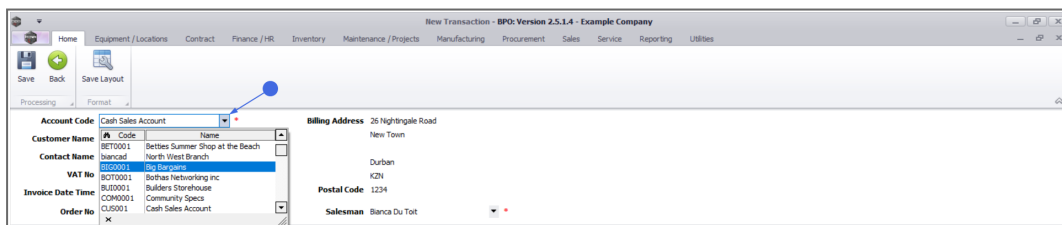
QUANTITY, UNIT SELLING PRICE AND DEPARTMENT

10. **Quantity:** The quantity is set to **1** by default. Click in the text box to type in or use the directional arrows to select the quantity required.

11. **Unit Selling Price:** The unit selling price field will auto populate, but the amount can be modified, if applicable.

12. **Department:** The department will display *Sales*, as configured by the Sales Office.

Additional Invoice Items

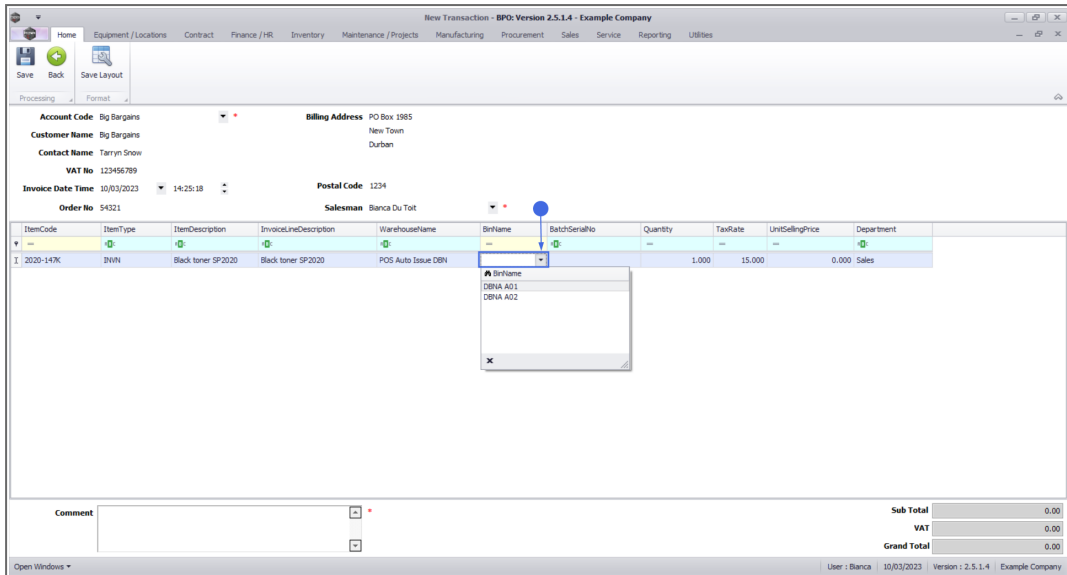13. After completing an Item line, press the *Enter* or *Tab* key or click any-where in the data grid to open a new Item line. Continue adding items as required.

DELETE ITEM

Incorrect line items can be removed from the invoice before is has been saved.

14. *Right click* on the line item you wish to remove to display the *Process* menu.
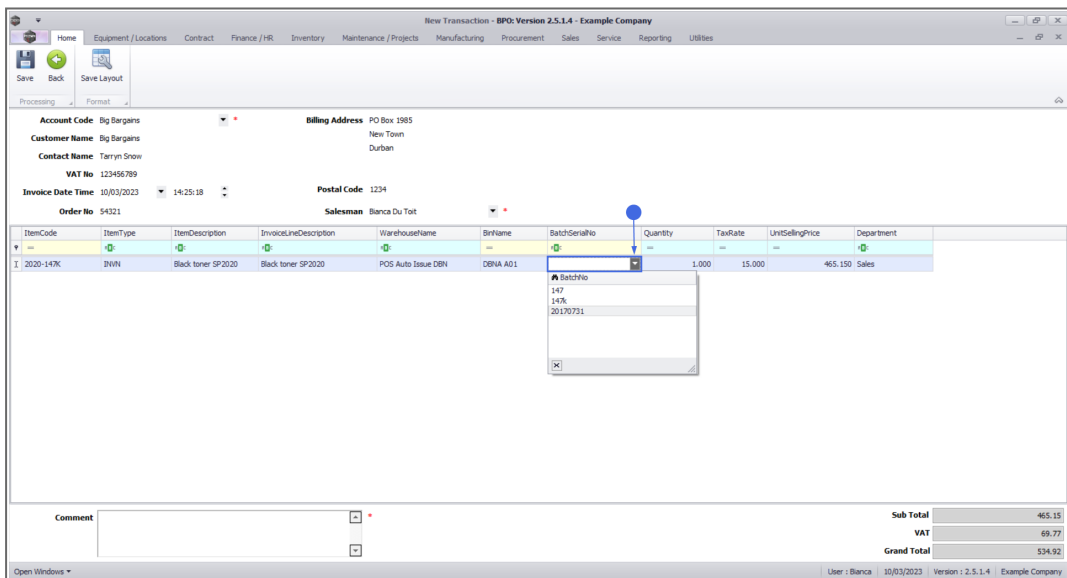
15. Click on *Delete* - Delete Item

16. When you receive the **Delete Row** message to confirm;
    - *Are you sure you want to delete this row for item [item code].*

17. Click on **Yes** to delete the row item, or
    - Click on **No** to ignore the request and to leave the item row on the invoice.

COMMENT TEXT BOX

18. Click in the *Comment* text box to type in a comment for the invoice. The comment will display on the Invoice when it is printed.
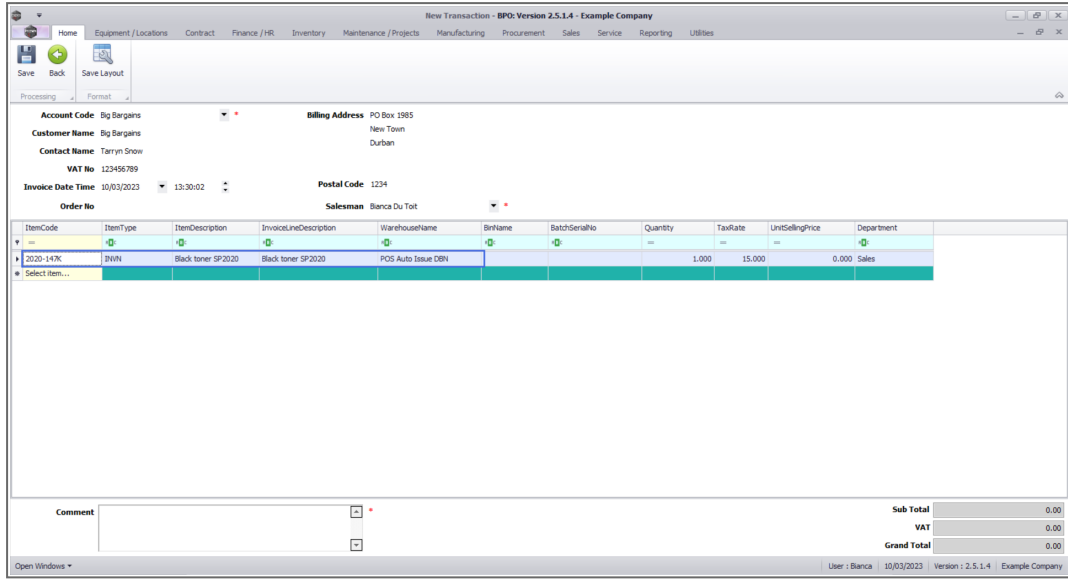
> Note that this is a mandatory field.

SAVE THE INVOICE

19. Click on *Save*.

20. When you receive the *Customer Processing* message to confirm;
     - *New invoice has been created :* [*customer code*]
21. Click on *OK*.

The *Invoices* listing screen will be updated with the newly created POS Invoice.

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