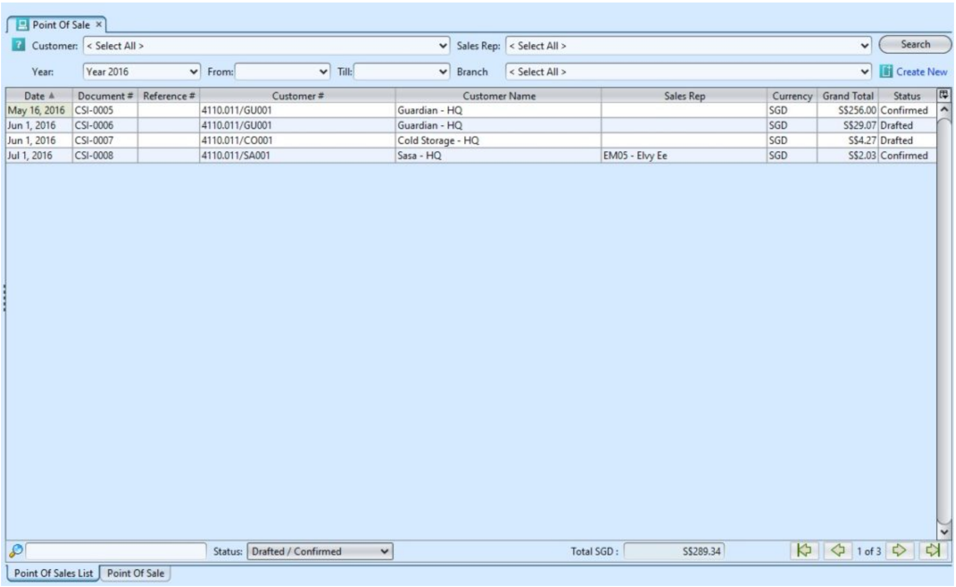
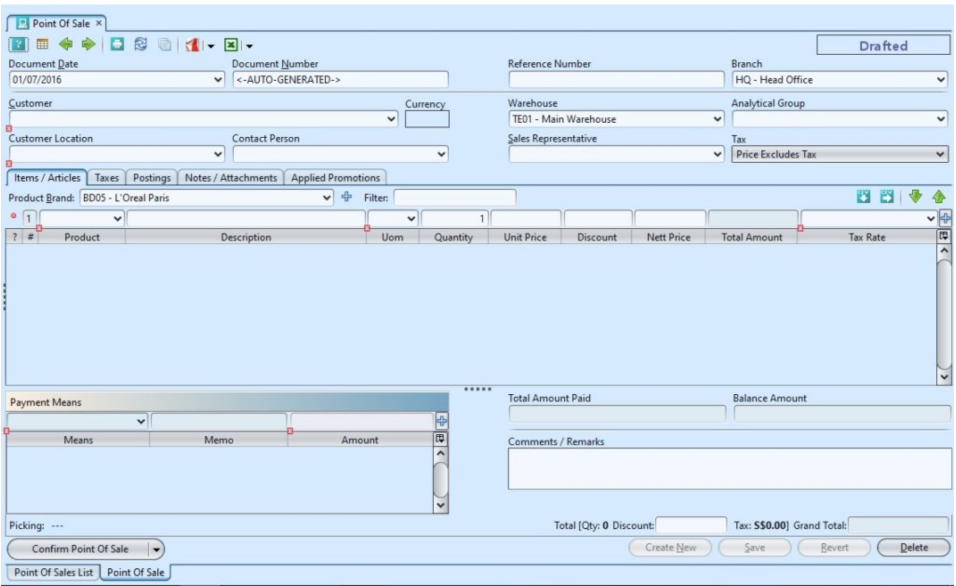
Point Of Sale (Sales module)

The purpose of the Point of Sale application is to handle direct sales transaction at the company’s warehouse or designated area. Below actions are available under ***“Point of Sale”:***

- Create new sales transaction; update, delete, view and search for sales transaction details.



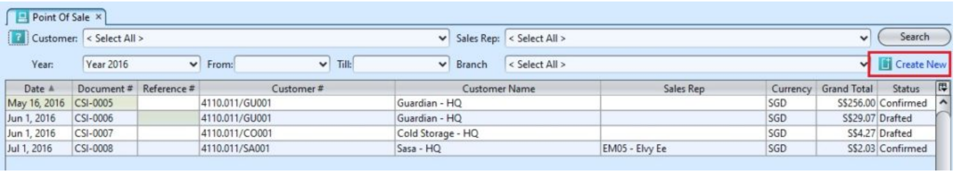


Field Name	Description	Mandatory Information
Document Date	Date of the sales document	Y

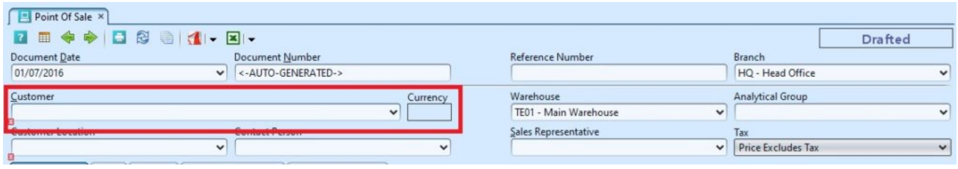
Document Number	Number of the sales document	Y
Reference Number	A unique number on sales document	N
Branch	A location, other than the main office, where business is conducted.	Y
Customer	Company’s customers	Y
Customer Location	Company’s location	Y
Contact Person	Self-explanatory	N
Warehouse	A place in which goods or merchandise are stored; a storehouse	Y
Analytical Group		N
Sales Representative	Internal representative	N
Tax	A compulsory contribution to state revenue, levied by the government on workers’ income and business profits, or added to the cost of some goods, services, and transactions.	N
Items/Articles – Product	Name of product	Y
Items/Articles – Description	Description	N
Items/Articles – UOM	Item’s type – Unit of Measure	Y
Items/Articles – Quantity	Quantity of item	N
Items/Articles – Unit Price	Unit price of item	N
Items/Articles – Discount	A deduction from the usual cost of something.	N
Items/Articles – Nett Price	Price after all deduction as for taxes, expenses, losses, etc	N
Items/Articles – Total Amount	Total amount for the item	Y
Items/Articles – Tax Rate	Tax Rate	N
Payment Means – Means	Method of payment for the sales document	Y
Payment Means – Memo	Memorandum.	N
Payment Means – Amount	Total amount of payment for the sales document	Y
Total Amount Paid	Total amount paid for the sales document	Y
Balance Amount	Balance amount owed (if any) for the sales document	Y
Comments/Remarks	Comments/Remarks	N

Create New Sales Transaction

1. Click on ***"Create New"*** at the top right of screen of ***"Point Of Sales List"*** tab, it will open ***"Point Of Sales"*** tab with empty form

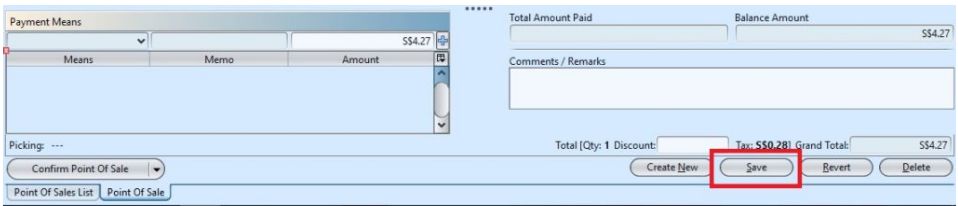


2. Select a customer from the ***"Customer"*** drop-down list on top left side of screen. It will fill up the form with the customer's info



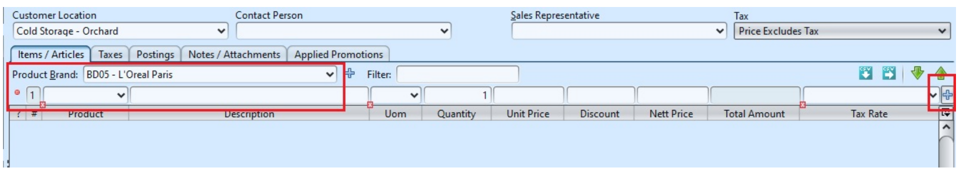
3. Fill up sales transaction's information on the top half of screen

4. Click ***"Save"*** button at the bottom right side of screen



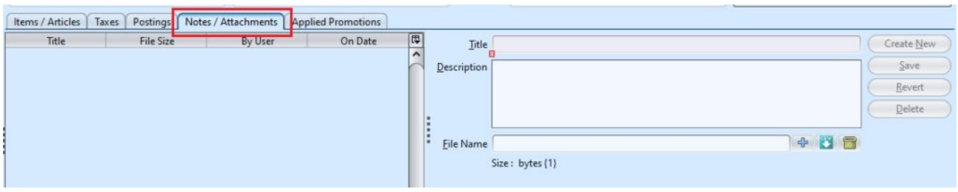
5. Filter the products list by selecting a brand from ***"Product Brand"*** drop-down list. Add product into the sales transaction by searching for the product from the product drop-down list in the table on ***"Items / Articles"*** tab

6. Enter the product's info and click "  " button to add the product into the sales transaction

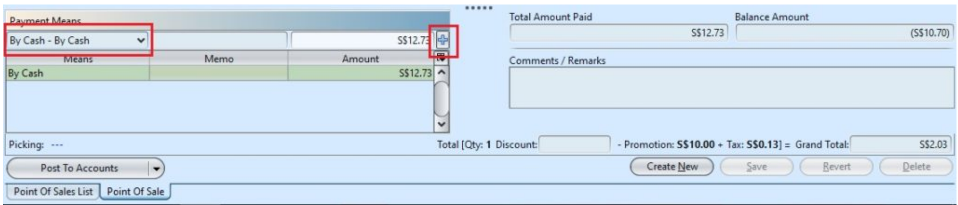


7. Repeat steps 5-6 to add more products into the sales transaction

8. Click on ***"Notes / Attachments"*** tab at the middle of screen to add notes or files attachment for the sales transaction

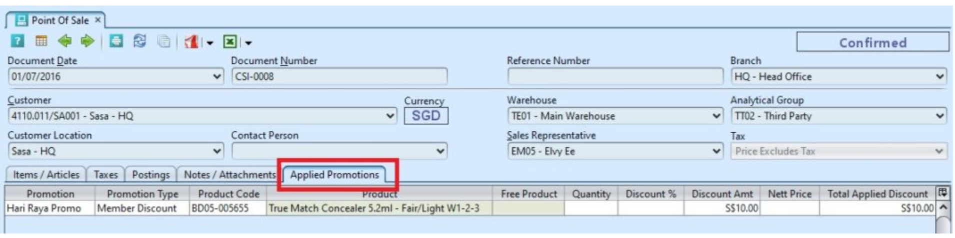


9. Select payment means from ***"Means"*** drop-down list on bottom left side of the screen and click "  " button to make payment. It is possible to add multiple payment means for the transaction

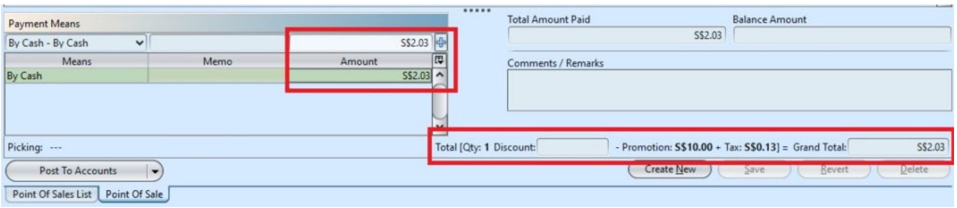


10. Click on ***"Confirm Point Of Sales"*** button at the bottom of screen to confirm the sales transaction

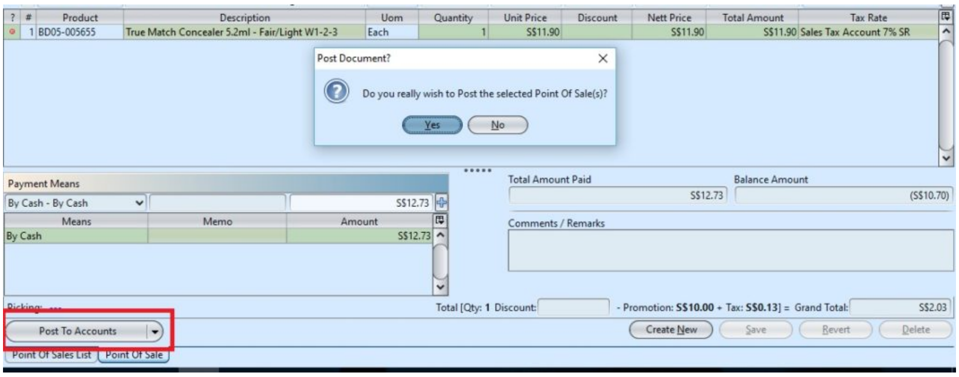
11. The item's promotion will shown from ***Applied Promotions*** tab if there is any.

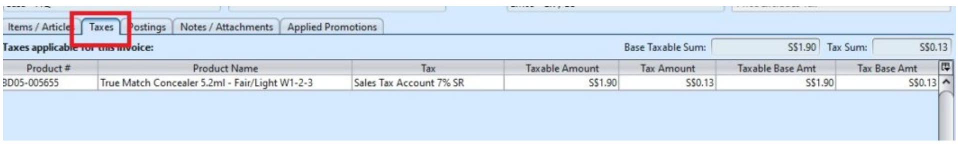


12. The payment's amount need to be change from the Payment Mean after confirmed the document because the promotion only shown after confirmed it. After change the amount, click Enter or "  " button.

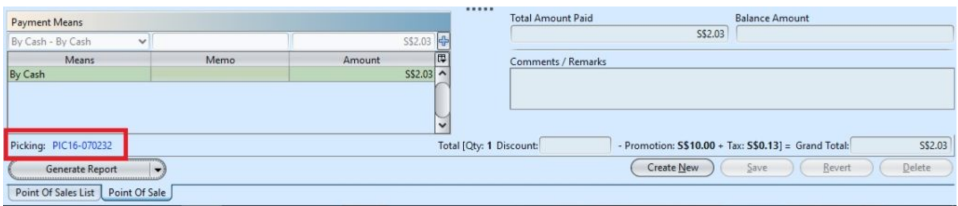


13. Click on ***"Post To Accounts"*** button at the bottom of screen to post the sales transaction to account. Tax entries applicable for the sales transaction will be automatically created under ***"Taxes"*** tab if any





14. A link to ***"Picking"*** transaction (Inventory module – Outbound) will be created at the bottom left of screen to process products' picking for the sales transaction

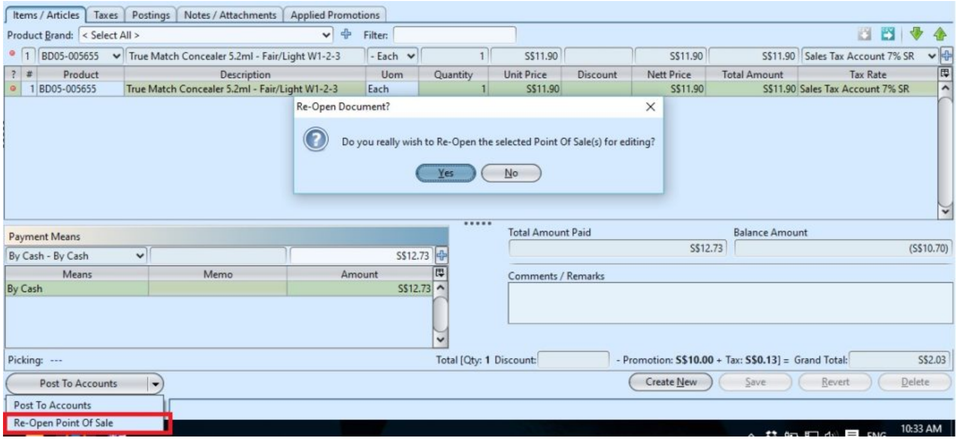


13. Click on ***"Generate Report"*** button to print the sales transaction document

Update Sales Transaction Details

1. Click on ***"Point Of Sales List"*** tab at the bottom of screen

2. Double click on sales transaction to be updated, it will bring up the details on ***“Point Of Sales”*** tab for the selected transaction. If a sales transaction’s status is ***“Confirmed”***, right click on the transaction and reopen the confirmed transaction first.



3. Make change(s) on the sales transaction information

4. Click on ***“Save”*** button at the bottom right of screen when done

5. Click on ***“Revert”*** button at the bottom right of screen or refresh icon at the top of the screen to roll back the changes

6. Click on ***“Confirm Point Of Sales”*** button at the bottom of screen to confirm the sales transaction

7. Click on ***“Post To Account”*** button at the bottom of screen to post the sales transaction to account

Delete Sales Transaction

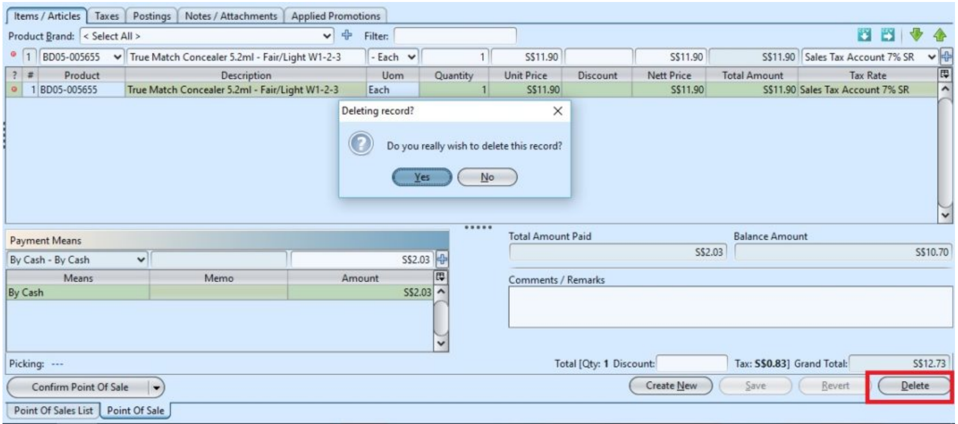
1. Click on ***“Point Of Sales List”*** tab at the bottom of screen

2. Double click on sales transaction to be deleted, it will bring up the details on ***“Point Of Sales”*** tab for the selected transaction. If a sales transaction’s status is ***“Confirmed”***, right click on the transaction and reopen the confirmed transaction

first

3. Click on ***"Delete"*** button at the bottom right side of screen

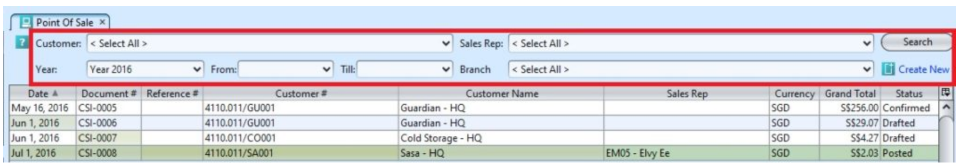
4. Click on ***"Yes"*** button on the pop-up window to confirm sales transaction deletion



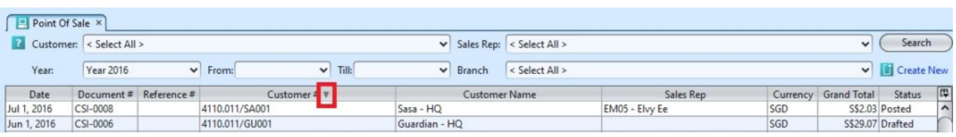
View and Search for Sales Transaction Details

1. Click on ***"Point Of Sales List"*** tab at the bottom of screen

2. Enter search parameter to filter the result, i.e. type in which customer to search for in the "Customer" text field box or select from drop-down list



3. Result can be sorted alphabetically by clicking the fields' columns



4. Double click on sales transaction to view full details of the transaction, it will bring up the

details on ***“Point Of Sales”*** tab for the selected transaction