



Point of Sale

✓ It's included

Everybody has Point of Sale.

Simple...



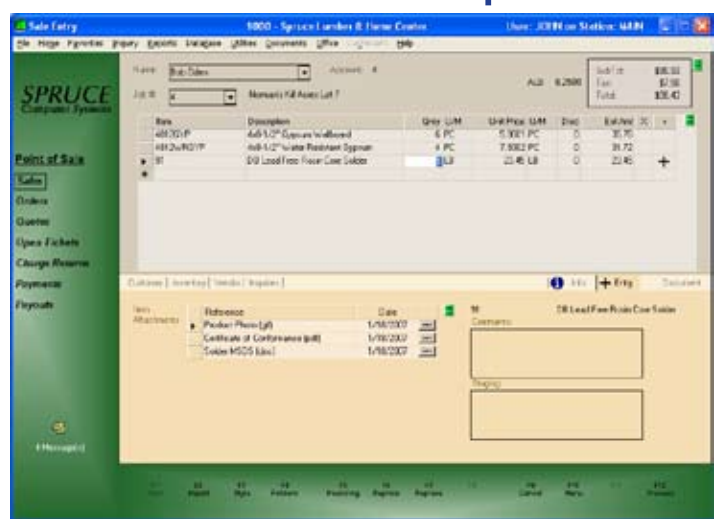
The basic Invoicing window. The "+" next to the third item, and its corresponding tab near the bottom of the screen, is a simple indicator that there's more information available, in this case item-specific information.

Right?

It's true. Old or new, simplistic or robust, cheap or expensive, Point of Sale is a given. So why sweat it when you're looking for software?

...but powerful

Here's the thing: if you take Point of Sale for granted, you might end up with your most important sales tool becoming a long term drain on productivity. The difference between a fast, intuitive, feature rich Point of Sale application and an average Point of Sale application can be the difference between two people in line and three people in line; between stressed inside salespeople who are looking for new jobs and relaxed, efficient inside salespeople who enjoy going to work; between satisfied customers and annoyed ex-customers.



There's an MSDS, a product picture, and a conformance certificate attached to the highlighted item. You can open them, email them, print them, or fax them to the customer instantly. Other folders are full of useful information ranging from customer and vendor contacts to the customer's purchase history for the highlighted item. It's all out of the way, but it sure is nice to have when you need it!

SpruceWare.NET Point of Sale was designed from the ground up to get your customers through the quote, order, special order and sales processes quickly, painlessly and effectively. We do it through simple transaction processing requiring few keystrokes and by building in features that cover all of your most important needs so you won't be inventing processes to make up for missing features.

How it works

Quotes, orders, invoices, open tickets, and charge returns are similar in many ways within SpruceWare.NET;. This helps simplify training and ensures fewer mistakes. Here are some elements they share:

Any SpruceWare.NET Point of Sale transaction starts with customer account selection, though the field can be skipped and revisited later. And everywhere on the system, you look up customers in the exact same way--using their name or any of the additional lookup options (including account number, address, city, assigned salesperson, phone number, or one of your own defined lookup keys). If the selected customer has jobs, you will be prompted for the job—pick from the drop-down list or type the job number.

When you're ready to enter items, you can:

- ✓ Scan them
- ✓ Manually enter partial or whole SKUs
- ✓ Look them up, including
- ✓ Group/section
- ✓ Vendor
- ✓ Keyword
- ✓ Description
- ✓ Manually-typed barcode
- ✓ Import them
- ✓ Bring in an existing quote
- ✓ Use the 20 20 interface
- ✓ Use the Andersen iQ import function
- ✓ Use the Import Wizard to import data from any outside source that can save to an Excel or comma-separated format, or copy items from any document ever processed through SpruceWare.NET including quotes, invoices, orders, POs, etc.

You can use tally items, material lists, items pulled from any vendor's catalogs stored on the system, manufactured items, and special order items as well as standard stocked items.

Pricing will come in automatically based on the customer account. If desired, though, you can reprice in any of these ways:

Individual line items:

- ✓ Manual Price Entry
- ✓ Price Level
- ✓ List Price
- ✓ Unit of Measure Price
- ✓ Discount off retail
- ✓ Margin over market, last, or weighted average cost
- ✓ Markup over market, last, or weighted average cost

Globally (for highlighted line items, for items within a selected

product group, or for all stocked items):

- ✓ Selected Price Level
- ✓ Margin
- ✓ Subtotal
- ✓ Discount off list
- ✓ Markup over cost
- ✓ Resetting to the customer's default

Use the **Replace** option to substitute SKUs throughout the transaction based on species or some other common trait. For example, you can substitute composite decking for pressure treated in one fell swoop, resulting in a speedy response when a customer asks for the difference in price. This function uses SKU patterns, and it usually works well using your current item SKUs.

The **style** option allows users to change from the default grid view to views that include other information, including item-specific margins, taxes, and item sets. A pick ticket style shows yard information per item.

Folders are well-behaved tabs that allow you to look up pertinent information about the transaction without leaving the transaction screen. They don't get in your way, but when you need them, they're there—just click or hit the appropriate key.

- ✓ **Customer**, showing general account and contact information, job information, and the customer's financial status (assuming security access is allowed by management).
- ✓ **Inventory**, showing basic item setup, locations, quantities, and stock status; as well as detailed current pricing and costs.
- ✓ **Vendor**, showing the vendor's item-specific information including their part #, package size/break, order multiple, and last purchase information for the primary vendor and two alternates.
- ✓ **Inquiries**, broken down into:
 - ✓ **History**, showing the current customer's history of purchasing the current item
 - ✓ **Purchase Orders**, showing stock status & costs and recent open purchase orders
 - ✓ **Receipts**, also showing basic item info along with recent receipts of the current item
 - ✓ **Work Orders**, adding to the basic item info by showing current manufacturing work orders for the current item.
 - ✓ **Info**, showing any outside files allowed to be viewed for the current customer through Point of Sale (attached files can be any Windows-compatible file, including maps and other image files, tax exempt certificates and other scanned documents, a link to the customer's website, a spreadsheet tracking the customer's purchased paint formulas, etc.
 - ✓ **Entry**, showing outside files and web links specific to the

current item (for example, the MSDS for the current item, a product picture, etc.) and with a free-type comments area for notes specific to the item (can print); informational staging notes if the item is being manufactured.

- ✓ **Document**, where the salesperson can attach scanned files, emails, voice mail files, etc. that are pertinent to the current transaction (for example, a contractor's list of items they'd like pricing on as received via email) and with a free-type notes area for notes related to the entire transaction document.

of this information is kept hidden until you need it - the tabs are the only thing showing.

When you are finished with a transaction, **Process** will take you to a window that again takes advantage of tabs to conveniently hide all but the basic and most important input fields for transaction closeout. Though these **closeout tabs** vary somewhat depending on the transaction type, they generally include:

A default **closeout** tab, and often the only one visited when processing a transaction. This may include payment methods for deposits or payment. If all is correct, as it usually will be for charge customers, simply choose Process and the transaction is complete.

Print, which will contain default print options and the means to override those defaults; output can also be saved in a file for later use.

Transmit, which will generally allow the document to be emailed, faxed, or sent via EDI (if applicable).

Attachments, which lists the outside documents that are marked by default to print during point of sale transactions.

Adjustments, which allows freight and other charges to be included for a transaction.

Delivery, which contains delivery options, delivery instructions/directions, job information, etc.

Account, which contains tax information, a customer PO field, and a selection list of authorized buyers. Photos of the authorized buyers can be shown if desired.

Quoting

When you create quotes, you'll be selecting a quote number (normally, you let the system assign a new quote number).

You can break the quotes down into sections (called **item sets**), which will be subtotaled on the resulting quote document. Item sets are also a convenient way to invoice quotes and orders,

since you can invoice selected item sets as opposed to having to invoice the entire quote or having to individually pick line items to invoice.

Ordering & Special Ordering

Like quotes, orders have numbers to make tracking easier. You can create orders directly or import quotes that have already been created. If you're ordering non-stocked (special order) items as part of the order, you'll have the option of automatically creating the purchase order(s) at the same time as the customer order.

When entering a **special order** (non-stocked) item, you have the option of selecting an item from any vendor catalog you have available. If the catalog hasn't been loaded, you have an essentially unlimited amount of space for descriptive information.

When an order with a special order item on it is saved, the special order item SKU is renumbered to a "SO"/Customer Order Number/Consecutive Number format (e.g. SO123456-001). This allows the item being ordered to be tracked easily through its entire life cycle, and the original generic SKU is kept with the new item for reporting purposes. A system parameter allows you to decide how many days the system should wait after the sale of a special order item before it automatically merge the renumbered SKU's history back into the original generic SO item while inactivating the renumbered SKU so it doesn't "pollute" the inventory database.

When **stocked items** are placed on a customer order, they show as committed, and the available quantity goes down accordingly. Once the item is sold, the committed quantity goes back down in conjunction with the quantity on hand being reduced.

Open Tickets immediately affect on-hand quantities, but they allow adjustments before final processing as invoices. They are ideal for use as yard tickets or for deliveries because changes to items and quantities can be made easily, and all the open tickets with no changes can be invoiced in one quick move.

Other functions within Point of Sale include **charge returns**, **payment processing** (ROAs, order deposits, COD payments, etc.) and **payments** (deposit refunds, petty cash, etc.). And without leaving any point of sale transaction, users can easily access windows for setup and modification of customer accounts, jobs, items, catalogs, customer contracts, price groups, sales tax locations, and adjustment codes. Users also have access to office functions, messaging, and the **document trail** (all assuming they have appropriate security access). A large number of inquiries and reports make for easy access to information, and cash drawer closing, invoice reversal, overrides, etc. are available as well.