SALE SCREEN

SALE SCREEN LAYOUT & OVERVIEW

- ➢ **NEW TABBED SALE SCREEN**
    - - **EASY EXISTING CUSTOMER SEARCH**
    - - **RENAMED PROMO TO ADVERT**
    - - **FINANCIAL INTEGRATION STATUS REFERENCE**

- ➢ **NEW PHONE SALE AREA**
    - - **SELL PHONE WITHOUT IMEI**

- ➢ **SEARCH PRODUCT CATALOGUE & STOCK**
    - - **EXTENDED SEARCH OPTIONS**

SEARCHING OLD SALES

- ➢ **SEARCH OLD SALE**
    - - **NEW PARKED SALES AREA**
    - - **NEW PERMISSIONS**
    - - **PRINT INVOICE**

SEARCHING OLD SALES

SALE SCREEN LAYOUT & OVERVIEW

1. **NEW TABBED SALE OPTIONS**
2. **EASY CUSTOMER REFERENCE**
3. **ADVERT FIELD NAME CHANGE**
4. **INTEGRATION STATUS (Optional)**

1. ClickPOS now offer a simple tab based sale screen.
   The previous Phone Sale Icon has been replaced with an easy navigation tab.
2. Customer Search field for easy selection of existing customers.
   Start by typing in the Customers name, mobile number, company &/or loyalty number.
   This will automatically filter all customer that match the search query and list for easy selection.
3. The Promo type field has been renamed to Advert to alleviate any confusion.
   Based on permission this can be made mandatory.
4. Integration status is designed to communicate with Flow and give status on how to handle the integration into either MYOB or QuickBooks. This is only applicable if you have opted for financial integration.

5. You can still search product in stock as per previous process.

6. ClickPOS now offer the ability to search using the product catalogue.
   Produce a descriptive search using Barcode, Name, Description &/or Product code.
   You may also search by Category, Supplier & other search types.

7. You can now sell the plan out even if the phone is not in stock.
   A combo box allows you to easily select the phone model.
   (Useful when the handset is despatched directly to the customer.)
8. Added more filtering options for easier plan selection.
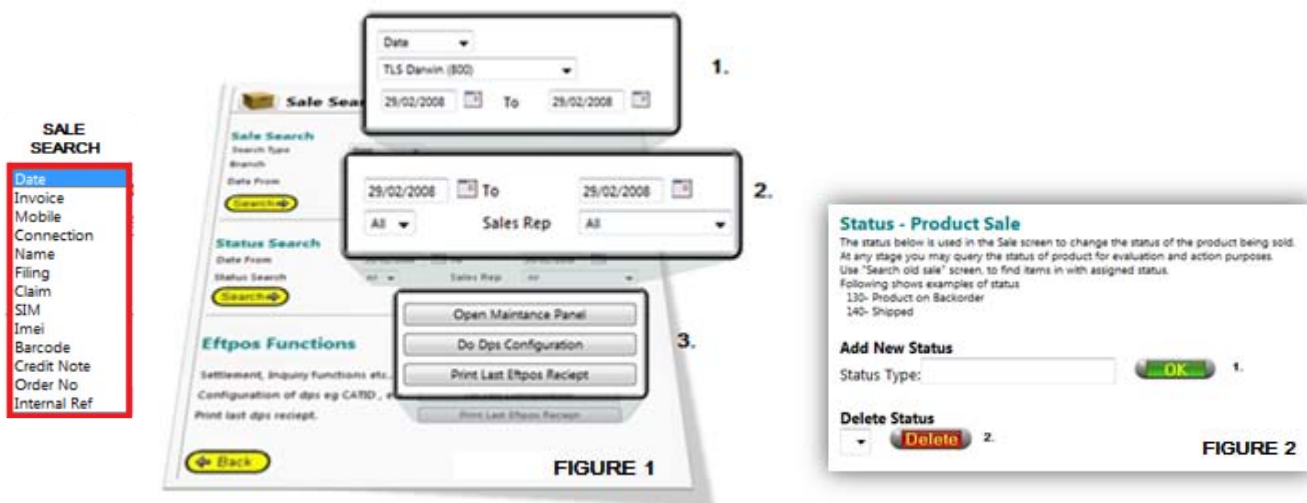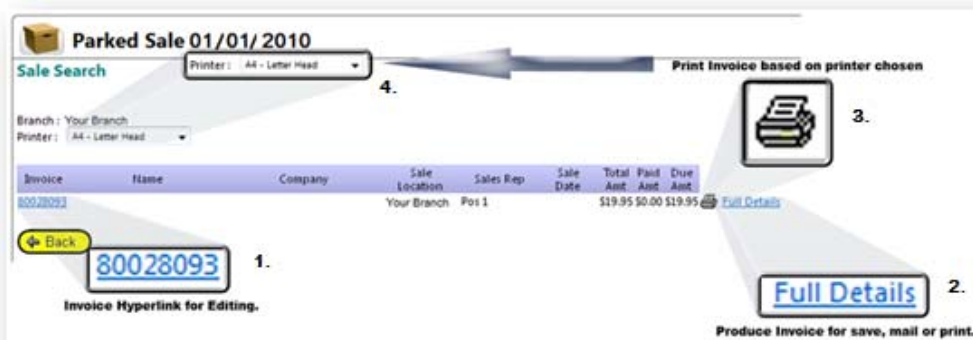
SEARCHING OLD SALES

FIGURE 1

FIGURE 2

FIGURE 1
1. **SALE SEARCH**
2. **STATUS SEARCH**
3. **EFTPOS – CONTROL PANEL**

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1. Like before ClickPOS offer the ability to search for old sales using Date, Invoice, Mobile number, Name, Imei & more. Simply enter a date range, select the store & choose a method of search.
2. Search sales by status. User has the ability to user define sale status for easy reference.
   (Fig2).   To build status for sale – MAINTAIN > SYSTEM ADMIN > OPTIONS > STATUS PRODUCT SALE.
3. EFTPOS CONTROL PANEL is a new feature that controls the DPS integrated EFTPOS function (OPTIONAL)
   In this area you can configure, maintain & print last EFTPOS receipt.
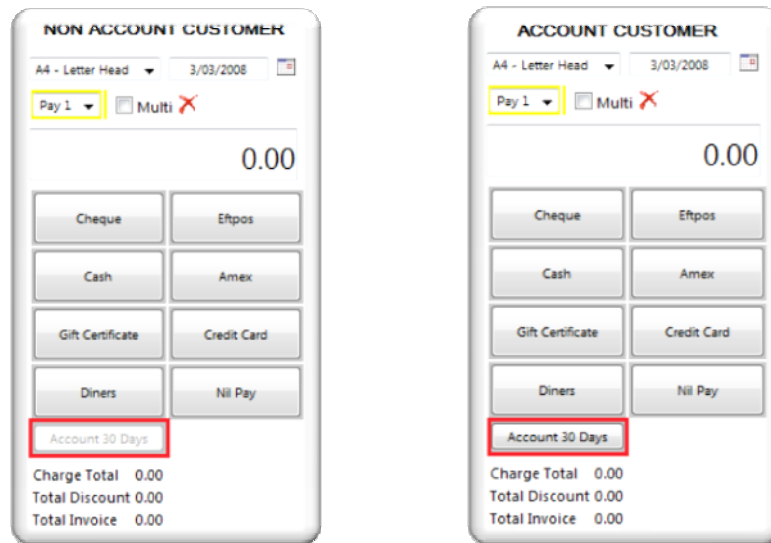
PARKED SALES

1. **INVOICE No**
2. **FULL DETAILS**
3. **PRINT**
4. **PRINTER SELECT**

1. Invoice number highlighted in blue, used to enter the sale to edit, delete or complete sale.
2. The full details link displays the current invoice in an A4 popup for print, email or reference.
3 & 4.   Select the required printer (4) and click the print button (3).

ON ACCOUNT PAY TYPE

1. Based on set permissions, the account button will only display if the customer selected is set to an account customer.

NEW PERMISSIONS

☐ **Search/Edit an Old Sale**

- The above permission now works in combination with Search/Edit an Old Sale (Parked Sales Only)

☐ Search/Edit an Old Sale (Parked Sales Only)

- The above permission is a new feature giving ability to only address parked sales.
A parked sale is a transaction which has not been completed.

- To make this effective you must uncheck
Search/Edit an Old Sale & check Search/Edit an Old Sale (Parked Sales Only)

☐ User must select No Comms

- When this permission is set the user must select whether there will be commission calculated.

☐ Restrict On Account Pay Types

- When this permission is set, "On Account" pay type will only appear if the customer is set as an Account Customer.