The Uniform Solution

Session II – Tips, Tricks, and New Stuff
10:30 am to 12:00 pm

Welcome to Session II

Workshop Outline

- Keyboard Navigation
- Procedure Hot Keys
- Date Entry Fields
- The Scan/Qty Field
- Inventory Search
- Customer Search
- Work Order Forms
- Working with Images

Keyboard Navigation

- The Mouse is convenient
- The Keyboard is fast
- Task 1 –Select **Ctrl + U,** then try out these Tips for Lists

Key	Action
Ctrl + L	Select the List box
Ctrl + Page Up	Go to the top of the List
Ctrl + Page Down	Go to the bottom of the List
Insert	Add a record the List
Enter	Change the highlighted record
Delete	Delete the highlighted record
Alt+ Down	Display the List Popup Menu
Alt+ #	Select the Tab with the #

Procedure Hot Keys

- Task 1 – Fill in the correct Hot Key in the Table

Item	Hot Key
Gift Card Balance	Ctrl + G
Create Invoices	
Inventory List	
Purchase Order List	
Receiving List	
Customer Search	
Inventory Search	
Open Special Orders	
Clock In/Out	
Log Off (Hint File Menu)	
On-Line Help	

Date Entry Fields

Date: 10/11/10

- Date entry fields use hot keys to set the date to frequently used values
- Task 1
  - Press **Ctrl + S** to load the Sales List for today's sales
  - Press **Alt + D** to select the Date field at the top of the list
  - Write down the results of pressing the following keys:

Key	Resulting Date	Purpose
M	10/01/10	Date set to first day of month
H		
T		
Numeric Keypad+		
Numeric Keypad –		
Y		
R		
Arrow Down		

Sales Entry Tips

Action/Key	Result
Ctrl+ Up	Move an item on a transaction up
Ctrl+ Down	Move an item on a transaction down
Ctrl+ Arrow Right	Copy the billing address to the shipping address
F6	View or enter item notes
F7	Lookup an Item
Alt+ F7	Use Inventory Search to find an item or **items on a Contract**

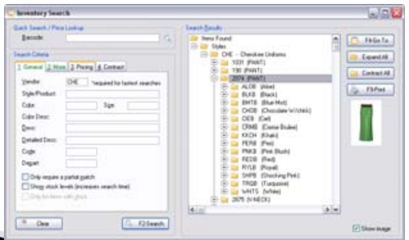
The Scan/Qty Field

- Task 1
  - Press **Ctrl + I** to start a new Sale. Perform the tasks below and record your observations:

Scan/Qty	Result
*10.00 + Enter	Misc item added to transaction
100004 + Enter	
S + Enter	
2 + Enter	
Q125 + Enter	
.25 + Enter	
..10 + Enter	
18.00 + Enter	
T + Enter	
578-7492 + Enter	
Johnson + Enter	

Inventory Search

- This utility may be the one of the most valuable and under-utilized options in the program
  - Performs Price and Stock level checks (for all stores)
  - Finds items matching styles descriptions and sizes
  - Enables item selection from Sales, PO, and Receiving Entry



Inventory Search – Part I

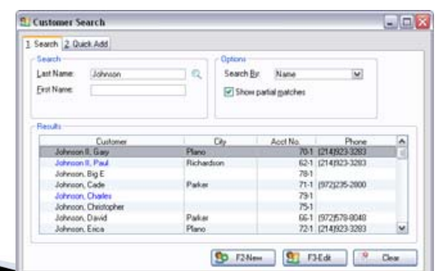
- Task 1 – Price Lookup
  - **Pres Ctrl + F to** Load Inventory Search
  - Type 100004 in the **Barcode** field and press enter
  - Item Price ______ Qty in Stock ______ Qty On Order ______
- Task 2 – Finding Items
  - Enter the Search Criteria
    - Vendor: **CHE**
    - Size: **5XL**
    - Check: **Show stock levels**
    - Check: **Only list items with stock**
  - Select **F2-Search.** How many different **STYLES** were found? ______
  - Find all **CHE** > **CIEL** > **M** items **in stock.** How may separate styles were found?________

Inventory Search – Part II

- Task 3 – Purchase Orders
  - Create a new purchase order for Peaches
    - Press Ctrl + P
    - Select the **Purchase Order Button** > **New Purchase Order**
  - In Purchase Order Entry
    - Set the **Vendor** to **PCH** (for Peaches)
    - Press **Alt** + **F7** to start Inventory Search
  - In Inventory Search
    - Set the Vendor to **PCH** and select **F2-Search**
    - Find and highlight **PCH-N6391-WHIT** in the Search Results
    - Select the **F5-Add** button to add the all sizes for PCH-N6391-WHIT to the Selection List
    - Select the **F8-Select** button to add the items to the PO. How many items are on the PO? ______
  - Now you can use the Scan/Qty field to update the quantity if you like

Customer Search

- Quickly locates customers by name, account number, alternate account number, employee id, and phone number
- Partial matches and auto-select
- Activities > Customer Search or Ctrl + A



Customer Search

- Task 1 – Find Customer by Last Name
  - Press Ctrl + A to start Customer Search
    - Search By: Name
    - Check Show partial matches
  - Enter **Johnson** in the Last Name and press Enter
  - Leave the first name blank and press Enter
  - How many Customers were found? ______
  - Enter **S** in the First Name
  - Press enter
  - How many Customers were found? ______

Customer Search

- Task 2 – On-Site Sales Example using Employee ID
  - Step 1
    - Select **Setup** > **Store** > **Update Store Settings** > **Defaults Tab**
    - Check: **Automatically assign new customers to a Billed Account**
    - Billed Name: **Baylor Medical Center**
    - Select **OK**
  - Step 2
    - Press **Ctrl** + **I** to start a New Sale
    - Press **F4-Find Cust** to start Customer Search
      - Search By: **Employee ID**
      - Uncheck: **Show partial matches**
      - Enter **0568** in the Employee ID Search Field and **press Enter**
      - No customer is found
      - Press **Alt** + **2** to select the **Quick Add** Tab
      - Enter your last and first name and address information
      - Notice the employee ID is pre-filled with **0568**
    - Select OK

Work Order Forms

- Collect Information about work required for items on sales and orders
- Are User Definable with Customizable Options
  - Entry, Date, Notes, Drop Lists, Check boxes Headings and Signature Lines
- Added to Sales Entry and Contract Items
- Work Order Details are printed below the item on the Sales Entry transaction

Work Order Forms

- Task 1 – Create a New Work Order Form
  - Select **Setup** > **Work Order Forms**
  - Select the **Form** Button and select **New Work Order Form**
    - Name: **Hem Men's Pants – Standard**
    - Description: **Standard Hemming Request**
  - Select the **Field** Button to **Add** the fields below. Save the Form when done.

Field Type	Prompt	Values	Default	Req'd
Heading	Hem Men's Pants	NA	Na	Na
Option	Inseam Length	26,28,30,34,36, 38	None	Yes
Date	Due Date	Na	Today + 7	Yes
Signature	Signature	Na	Na	Yes

Work Order Forms

- Task 2 – Use the work order form
  - Press **Ctrl** + **I** to start a new sale
  - Enter **100004** to add a pant to the transaction
  - Enter **107688** to add a hemming item to the transaction
  - Press **F6** to bring up item notes
  - Press **F6-Work** to add a Work Order to the item
  - Select **Hem Men's Pant's Standard**
  - Fill in the Work Order details and select the **OK** button
  - Review the formatted work order saved in Work Order Notes
  - What symbol is used before the heading name "Hem Men's Pants"? __________________

Working with Images

- The Image List is used to store images in the program
- Images are automatically resized to a maximum resolution – keeping file sizes smaller
- Images in the Image List can be assigned to Items, Vendors, Departments, Colors, Customers, and Users
- Images are displayed throughout the program and in the WebStore
- Images are saved in data backups
  (automatically downloaded vendor images are not saved in the backup)

Working with Images

- Task 1
  - Select **Lists** > **Vendors** (**Ctrl** + **M**)
  - Select **White Swan** for update
  - Click the **Select Image** button
  - Select **F2-New Image** to pick a new image
  - Select the file **c:\Usw\Pre-loaded Images\Logos\whiteswan.png**
  - Select **Save and Select**
  - **Click the image** being displayed on the Vendor Form for options
  - What are the two options? (1)_____________(2)________________
  - Select **OK** to save the logo for White Swan

Questions