**Meeting 6.10.17**

*In Attendance:*

* Carlo
* Stephen
* Nathan
* Tyler

*Discussions:*

* Still need to “delete”
  + Refund does the same thing
  + Total refund button
    - Popup confirmation
* Refunds show up on daily invoices
* Return invoice show date of the return
* Sales default enter key still starts a quick sale
  + Should do an invoice search
* Can enter cust date mid sale
  + Name – Phone
  + Comments print on invoice
* Find invoice by searching for sku’s
* Find invoice by searching for item description
* Checkbox for join email list
  + Billing address -> join email list
* View profile -> view invoices
* Name the change calculator to “Change Calculator”
* Add customer button to the sales page
* Inventory is being done the week of Oct 16th
* Popup for employee ID on process sale
* Cart click on sku to jump to edit item

Meeting – 10/6

Carlo, Steven, Tyler, Nathan

Current version – Refunds (missing the Delete button)

Add refunds to the home page for today sales.

Bug – refund date showing original refund date.

Sales screen invoice search wants default button to be the Invoice Search

Written receipts are custom orders….. needs to add items to inventory (ability already there) LMFAO

Want - Locate invoice based on skus or description of sku.

Instead change billing and check box in customer to be email marketing.

Add new customer button to the sales tab.

Add new customer from the sale then head back into the sale.

Need to enter employee code to complete sale to track who is completing transactions

Entering sales, negative discounts…… jump to edit item from the cart to adjust price easier, possible desired price.

Add time stamp to invoices.

Future – inventory functionality.

Add to power point to add in cashout report need to be processed before can print

Final Analysis:

They noticed that the delete invoice button has been removed. This is because there should never be a time that an invoice actually gets deleted. In order to reverse a transaction the user needs to complete a return on the full invoice. They had also had a stack of hand written receipts where they couldn’t actually complete the sale through the system. They requested that they be able to change the date when processing a sale. I advised that they can process the sale as normal and we would update the date through the back end. Stephen explained that the reason for all the hand written reciepts was due to not being able to add inventory into the system. Explained that the function to add new inventory has always been there.

For the 10/16 release we were able to complete adding return invoices to the home page to also calculate with the actual sales. Fix a bug where during a return the invoice was showing the original date of sale instead of the actual return date. Change the default button on the Sales Home page from Quick Sale to Invoice Search. Add functionality when searching for invoices to also search by SKU and item description. Added some marketing functionality by changing the billing checkbox in the customer profile to an enroll in marketing box. When viewing a customers’ profile they can now view all the invoices for that customer. Created ability to add a new customer and even change the current customer during a sale. In order to track the employees completing sales they will now have to enter an individual code each time to process the sale. The last item we were able to include was to add a time stamp to all invoices.

Discussed and not implemented was a process to change the price of an item during a sale so they didn’t have to enter a negative discount for some items since that looks bad on the invoice. I see this as more of a data integrity issue. Constantly changing the price of an item (No Cost Service item) can cause more problems.