

Processing BTS Booklists Through the POS System

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Following are the steps required to process a BTS booklist that has been made up by a staff member when the customer is not present. If the customer is present while the booklist is being picked then these steps are not necessary.

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1 Creating the Customer Account

Before ringing up booklist items, you must first create an account for the customer if one does not already exist.

1. Press **Esc** to exit the POS screen.
2. Select **Customer Maintenance** in the third column of options.
3. Press **Add** in the top bar or **F11** to add a new customer account.
4. Enter the first three letters of the customers last name into the *Customer Code* box and press **Enter**.
5. Type the customers full name into the *Customer Name* box.
6. Keep pressing **Enter** until the *Mobile* box is highlighted and enter the customers mobile number.
7. Keep pressing **Enter** until the *Zone* dropdown is highlighted and select **Back To School**
8. Keep pressing **Enter** until the *Salesperson* dropdown is highlighted and select your name.
9. Keep pressing **Enter** until the *Payment Terms* dropdown is highlighted and select *Immediate*
10. Press **Save** in the top bar or **F12** to finalise adding the account.
11. Press **Esc**, then press **TouchPOS** to return the the POS screen.

Customer Code: **MCH03**

Customer Name: **CONNOR MCCONNERSTON**

Company Name:

Contact:

E-Mail:

Phone:

Fax:

Mobile: **0477 013 910**

Postal Information:

Address 1:

Address 2:

Suburb/Town:

State:

Country:

Delivery Information:

Address 1:

Address 2:

Suburb/Town:

State:

Country:

Zone: **BACK TO SCHC**

Store: **NEXTRA MORA**

Sales Person: **CONNOR MCHU**

Delivery Group: **DELIVERY GRO**

Club No:

Category:

Established: 04/01/2024

Date Last Purchase: 04/01/2024

Last Payment: 04/01/2024

Account Type: Open Item

Bill to Account:

Price Code: 1

Credit Limit: \$0

Credit Status: Good

Payment Terms: **Immediate**

Customer ABN:

Tax Exemption: ☐

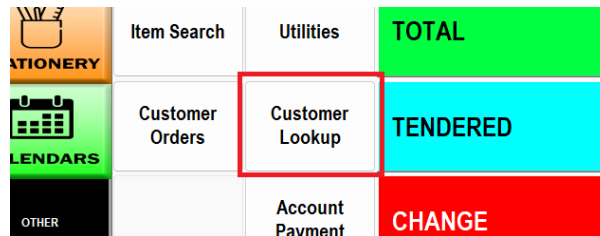
Exemption Details:

The new customer account has now been created.

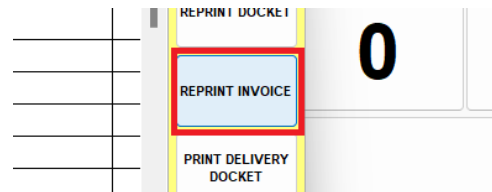
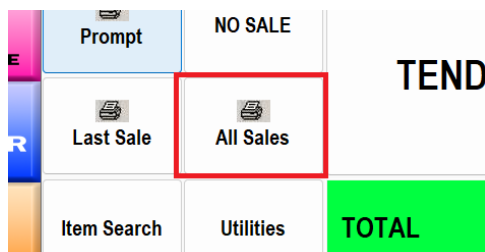
2 Ringing Items Up to the Customer Account

Once you have picked all of the items in the book list, you must ring them up to the customer's account. For customers that have multiple booklists, please ring each list up as a separate transaction.

1. Press **Customer Lookup** in the function buttons section on the POS screen.



2. Type in the first three letters of the customers last name and use the and keys to select the correct customer account and press **Enter**.
3. Ring up all of the items that you have picked. Check against the list as you are ringing them up to double check that you have the correct items and quantities.
4. Once everything has been rung in, press **Tender**, a receipt will print.
5. Log back into the POS screen and press **All Sales**, then press **Reprint Invoice** and print the invoice to the *Front Counter Printer*

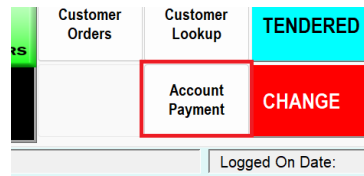


6. Write the year level of the booklist on the bottom on the invoice, and if there are multiple bags, make a note of how many bags there are.

3 Selling the Booklist to the Customer

When the customer comes in to pick up the booklist, you will need to follow the following steps to finalise the sale. Note: these steps are not necessary if the invoice has a *Paid* stamp on it, if this is the case you can just hand the booklist over to the customer.

- Press **Account Payment** in the function buttons section on the POS screen.



- Type in the customer code that is on the invoice in the *Customer Code or Invoice No* box and press enter.

Date	Customer Code	Order
4/01/2024 12:22	MCH03	
Product Code	Description	
2690 GNS	SCRAPBOOK SOVEREIGN 335	

Customer Code or Invoice No	MCH03	CONNOR MCCONNERSON
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- Press **Alter** in the top bar or **F10** to enter alter mode on the customers account.
- Press the **Statement Date** button, you will see that the *Total* will update to the total of any booklists that have been rung up on the customers account.

	78.64	78
Statement Date / /		Cal
Auto Payment		

- Press **Tender in POS** to bring the transaction back to the POS screen and finalise the transaction as normal.

