

BookMine Basics

Point Of Sale

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BookMine Basics for POS – How to get Help

Primary sources of help in Bookmine:

- **The F1 key** is a great first port of call. Every screen has its own context-sensitive help file, so this is an excellent way to get help on the task you are working on throughout the program.
- **Tooltips** – every button has a tooltip attached to it. When the mouse pointer is held over a field or command the tooltip appears (unless tooltips have been turned off under User Options – see User Options for details on how to turn off tooltips and how to turn them back on again).
- **Training** – Bookmine is a comprehensive program that will enable you to automate many of the functions needed to run your business more efficiently. Training is essential to maximise your return from Bookmine.

The following document is a beginner's tour of some of the functions in Bookmine. It is not intended to be a comprehensive guide to every function. It is a guide that can be used to quickly refresh your memory whenever you need help carrying out a core function.

Point Of Sale Overview

The Point Of Sale (**POS**) interfaces provide all the functionality required to process counter sales in a typically busy store. For mail order sales we recommend the mail order interface, which provides more versatility for handling tax, bill to/ship to addresses, exports, and many other options not appropriate for POS sales. You can find more details by pressing F1 key when in Bookmine and read the online help file.

The program can be opened in POS Mode from the desktop or from the transactions summary area within the main program. The POS interface and the full interface display different views of the same underlying contact and inventory records so that all information collected at the POS and via the mail order interface is available for analysis from a central location. Extensive customer and inventory lookup and maintenance are also available from the POS interface.

These functions mean you can search your inventory for a book even when you are halfway through a sale, or find out whether a customer has already bought a book from you with a quick look at their sales history without having to cancel your current sale.

All the functions in the **POS interface** can be accessed via two main interfaces: The **POS Summary** and the **POS Sales** interfaces.

During normal operation at the front counter you spend most of the time on the Sales interface, processing sales in a loop. The Summary interface is used to view totals and to pick up parked sales that you now want to resume.

Many functions are available from both interfaces and it is left to the operator which one they use based on their own preference.

Opening the POS interface

There are 2 ways to open the **Point of Sale** interface in Bookmine.

1. From a **desktop shortcut**. Double click on the POS icon for Bookmine. This will load the program in POS mode. A user verification box will appear on the screen. Select the user and enter the appropriate password and press enter. The POS interface will now open.
2. From within the **main program** itself. From the main switchboard click the button marked **Point of Sale (F5)**. Depending on your user options, you might be prompted to enter your user information. If you are, just select your operator name, enter the appropriate password and press enter. The POS interface will now open.

Both methods will result in the Main POS Switchboard being displayed.

Most functions described in this section will be launched from the POS Sales Interface, which you can open from the Main POS Switchboard by pressing the F4 key or clicking on the POS Terminal screen.

POS Summary interface

Annotations:

- Display full details for this invoice
- Click to Sort ASC/DESC on any column
- View or process payments against this invoice. Process returns against invoice
- (F3) Start a new invoice or other transaction
- Open the Main Sales interface directly

Display Transaction	Trans ID	Transaction Type	LastName Business name	Date Sent Shipped	Invoice/Credit Total	Total Paid to date	Payment details	Amount Due
Details(F7)	373550	Credit Note	milis	Tue 28/Mar/2006 10:14	(12.00)	(12.00)	Pay (F6)	0.00
Details(F7)	373549	Counter Sale	Counter Sale.	Tue 28/Mar/2006 10:16	80.00	80.00	Pay (F6)	0.00
Details(F7)	373548	Gift Voucher Credit	milis	Tue 28/Mar/2006 10:10	(50.00)	0.00	Pay (F6)	(50.00)
Details(F7)	373547	Gift Voucher Sale	milis	Tue 28/Mar/2006 10:10	50.00	50.00	Pay (F6)	0.00
Details(F7)	373546	LayBy	Sonas Enterprises	Tue 28/Mar/2006 10:08	102.00	20.00	Pay (F6)	82.00
Details(F7)	373545	Counter Sale	Counter Sale.	Tue 28/Mar/2006 10:12	83.00	83.00	Pay (F6)	0.00
Details(F7)	373544	Counter Sale	Counter Sale.	Mon 27/Mar/2006 11:12	48.00	48.00	Pay (F6)	0.00
Details(F7)	373543	Counter Sale	Counter Sale.	Mon 27/Mar/2006 11:02	23.00	23.00	Pay (F6)	0.00
Details(F7)	373542	Counter Sale	Counter Sale.	Mon 27/Mar/2006 11:01	45.00	45.00	Pay (F6)	0.00
Details(F7)	373541	Counter Sale	Counter Sale.	Mon 27/Mar/2006 10:56	40.10	40.10	Pay (F6)	0.00

Record: 1 of 22

Buttons: Exit to SWBD (F2), Start New (F3), POS interface (F4), (F12) Contact Lookup, Sales Totals, (F10) Stock Lookup, POS Options, Main SWBD (F5)

Display Invoices for: Today, Yesterday, Select a Date range..., Show for all terminals..

From here you can view **summary** information for each sale processed on the terminal for today, or any period if you have the privilege level required. You can also view sales on other terminals but be careful no to interfere with a sale that may be being processed by another operator.

Sort display – Click on any heading to sort Ascending/Descending on that column.

Details (F7) - view details of any invoice.

Start a new Sale (F3) - Starts a new sale to the counter customer.

Open the Sales Interface (F4) – Opens the standard sales interface. Also done by clicking on a specific line item's Details button. The Sales interface is the screen you will spend most of your time at when dealing with counter sales.

The POS Sales Interface

Bookmine Enterprise V8 Licensed to Asia Bookroom ...

Scan/Add **Search/Add(F4)...** **Goto Trans** **Trans ID**

SALLY-BILLY (BILLY) **Invoice Counter Sale**

Cust Counter Sale. **Detail (F11)...** **Link...** **Contacts (F12)** **Stock (F10)** **Void Sale** **Parked...** **Full Mode...**

StockID	Misc Tag	Title/Item/Service	Qty	Unit Price	Price Extnd	Item Discount %	Discounted Price Extnd
78735		The Animals of the Chinese Zodiac.	1	14.95	14.95	0	14.95
99698		Kimono Gift Wrap.	1	17.95	17.95	0	17.95
99698		Kimono Gift Wrap.			.95	0	17.95
99698		The Deep-Blue Bergamo Set.			.95	0	39.95

Raised Tax (%) P and P
 Shipped Apply Invoice Discount %

Total **90.80** **Due** **90.80** **Payments.**

Callout Boxes:

- Display history for customer linked to this sale (if any)
- Void the active sale and start over.
- Display invoice in mail-order window so you can use advanced options like postage and mailing address.
- Link this sale to a customer record.
- Scan a title, enter part of a title or a stockid to add to the active invoice
- List of items currently in the invoice. In active invoices the quantity, unit price and item discount can be changed. Can set discount for all items below.
- Locate and display details for any item in stock without adding it to the invoice.
- A parked sale is a sale that has been momentarily paused, perhaps so that another customer's purchases can be processed first. See below for more details. Several sales can be processed in parallel.

Sales interface Functions (Quick overview):

- **New Sale (F3)** – start a basic sale to the Counter Customer in a loop. The sale is not linked to any customer. (Use F8 for linked sales, deposits, gift voucher sales, etc)
- **Scan/Add** – In active invoices (not locked or paid – active invoices have a green background, locked ones a red background) you can add an item to the invoice displayed by scanning a barcode or entering a title or part of a title. You can also use an asterisk before a word to do a wildcard search, so for example you can type ‘*Peace’ to find every title that contains peace.
- **Add items (F4)** to invoices. Enabled only on active sale. Use **Scan/Add** field to auto add items to the active invoice by just scanning a barcode. You can also do more complex searches using this button, for example if you would like to search for items by author or other field such as department, publisher. Any combination of search fields can be used to locate specific items. You are presented with a list of matching candidates. Select to add one to the active invoice.
- **Change quantity** – click in quantity field and type the new value into the box.

- **Remove (F5)** item from invoice. Click to remove item. Enabled only on Active sales. Once a sale has been locked or completed it is not possible to remove books this way.
- **Pay (F6)** - Process **payments** against the invoice. (Use Payments button to display existing payments and process new ones on any sale/credit.)
- **Pay/Print (F7)** –Prompts for payment if not fully paid and prints a docket. The sale is automatically locked. The summary of the sale is displayed.
- **Open Till (F9)** – opens cash drawer if operator code is verified. The user is prompted for optional text that will be printed on a docket.
- **Parked** - lists **Active/Parked** sales for this terminal. Displays sales that have not been shipped (locked) that were started on the current workstation. To park the current active sale simply start a new sale (by clicking on the ‘New Sale’/’All other Trans’ buttons or pressing F3 or F8) and agree to continue when prompted.
- **Void Sale** – void current sale. Removes all items and returns them to stock. Zeroes all payments. **BEWARE!!!** Can cause anomalies in sales histories if locked sales are reactivated and voided.
- **Stock lookup (F10)** - do search for any item in the Inventory database. Useful if a customer asks about a title. Extend the search to Bookfind Compact CD or Bookfind Online if configured.
- **Contact/Customer Lookup (F12)** - lookup a customer and display their history. Create new customer records. Administer special orders, maintain awards, and manage emails.
- **Link a sale with a contact** – link the current sale with a customer in the database or a new customer. This is useful for managing customer information, as by linking each sale you will always know what your customers are interested in, and can therefore make recommendations to suit. Linking also makes management of customer rewards programs a much simpler process as you will be able to tell at a glance exactly how much they have spent and reconcile returns with your customer records (thus avoiding the difficult situation of customers who acquire large amounts of points through continually buying and returning items). You can also create a new customer record if they do not already exist. Sales can be linked at any time, although it is best to do so before finalising a sale.
- **Quantity/Price/Discount** – these can be modified whenever the invoice is ACTIVE.

All Other Trans (F8) – Use this to process laybys, special orders, gift vouchers, refunds, deposits, customer holds and other less common functions. See below.

Sales interface Functions (Overview):

Starting a POS Sale (Working from the POS Terminal screen)

(See above for an annotated image of the POS Terminal Screen)

New Sale (F3) – Process **Counter sales** in a loop. The customer is unknown. The focus for the cursor is automatically placed in the Scan/Add field. To add an item to the current invoice either scan a barcode on an item, enter the start of a title or type in a valid stock ID. Scanned items that match a single item in the database are automatically added to the invoice. All other methods require you to select the item to be added from a list displayed.

When all items have been added press the F7 key to process payment and print the docket. Use F6 to pay without printing. Pressing either of these buttons will bring up the payment options screen.

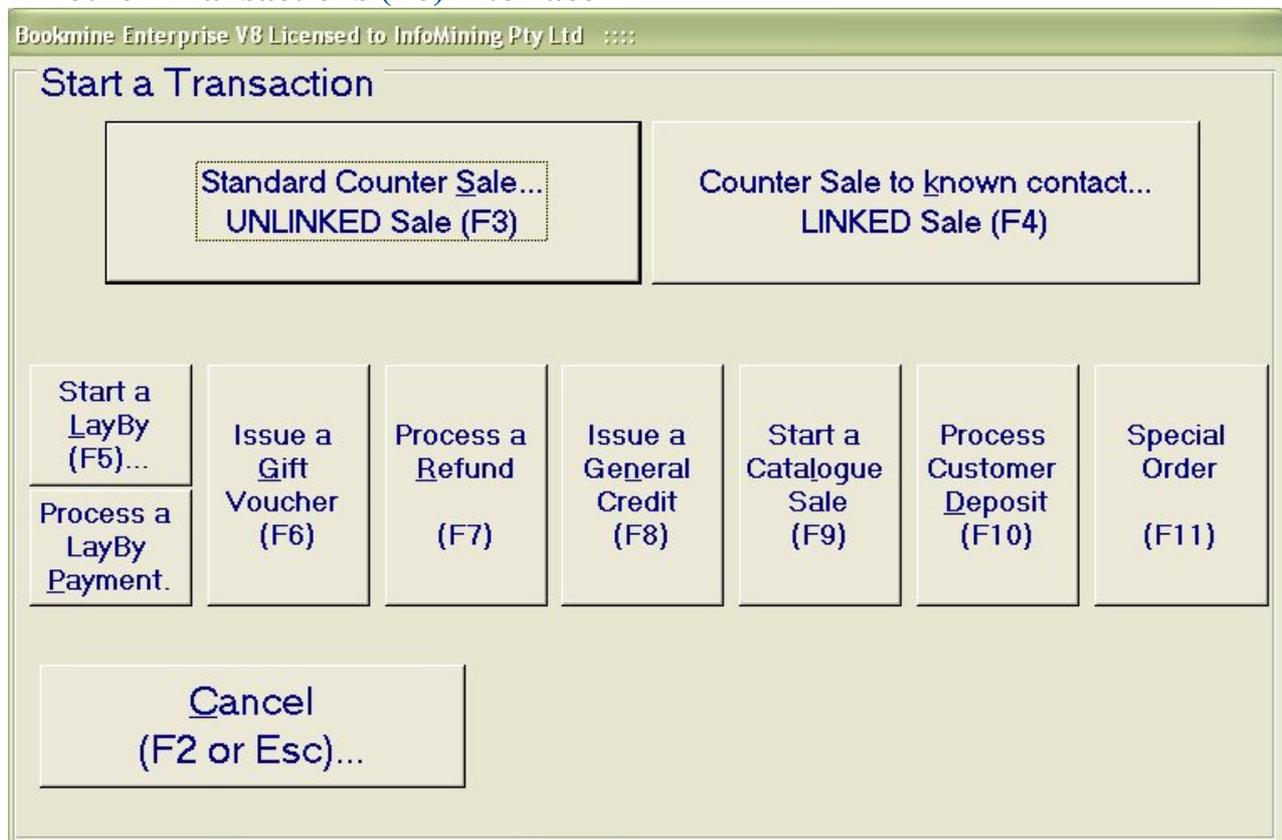
When this sale is finished you are optionally prompted to start another. This is the mode of operation to use if sales are being made to several unknown customers in a row.

You can link a sale to a customer at any time during the sale by pressing the **Link...** button. However it is best to start a linked sale (see below) as any items on hold or credits due will be automatically handled during the sale.

Parking Sales – Multiple sales simultaneously

You can process several sales simultaneously if required. Just start another sale anytime during the process and say yes to the prompt warning you there is already an active sale displayed. To return to a parked sale use the **Parked** command button and select from the sales.

All other Transactions (F8) interface



All other Transactions (F8) on the Sales interface – The screen above is displayed. Start any type of transaction such as **Linked Sales** (Sale to a known customer), **Layby, Gift Voucher, Refunds, Credit Notes, Catalogue Sale, Customer Deposit, Special Orders, Placing items on Hold**

- From here you can select the type of transaction to be processed such as “Sale to known Customer”, “Standard Counter Sale”, Layby etc

Unlinked counter sales can be linked to customers if you wish to keep detailed sales histories (highly recommended). Unlinked sales are automatically attributed to a generic “**counter customer**”. It is good practice to get customers details so that sales can be attributed to them and tracked.

If you know the customer’s name click the “Counter Sale to Known Contact” (F4 or ALT+K) button.

A sale which is processed using a known contact links the details of the transaction to the customer. This builds customer histories enabling you to determine who has spent what, what they bought and when, making it is easy to work out who your best customers are. Even if the customer is not already in the program it is very easy to enter their details on the spot.

Depending on your user options you might be prompted to enter your user code after clicking this button. If so fill it in and press enter.

Choosing a Customer

(Refer to the screen shot for the Customer Search Interface in following pages)

Regardless of whether you needed to do that or not the next screen you see will be the search screen. Here you can look for customers based on all manner of details. The default search box will find them based on their last name. Once you have chosen the parameters you wish to search for and press the enter key a list of matching contact records will be displayed in summary format on the screen.

Select the record that matches the customer you are serving and the process is complete! Whatever purchases this customer makes in this transaction will be added to their record for future use.

If there are several possible matches and you are unsure which of the records is the correct one, click the **Details** button (alt D) alongside the customer entry to see full contact details. You can also modify client details at this point if any of their details have changed.

If the customer is not already in the database the user can create a new contact record for them and enter their details at this stage.

After selecting the type of sale you are presented with an interface for adding stock items to the invoice. From here on the process is identical to that of the standard unlinked sale, so please refer above for advice on completing that process.

Laybys, Gift Vouchers, Credit Notes, Catalogue Sales and Deposits : All these require the operator to select a customer to link to. Consult the ‘Choosing a Customer’ section above if you need assistance.

Gift Vouchers (F6)

From the POS Terminal click the “All other Trans” (F8) button and select **Gift Voucher**. You are prompted for the **purchaser’s** name (if they are not already in the database you can create a new contact record for them from here), for the number of gift vouchers being sold (all must be of the same value) and for the amount and any comment. NOTE: Do not select the person who the voucher is intended for here. The voucher should be linked to the **purchaser**.

You are prompted for payment and a docket prints. The docket contains details of the sale including the Gift Voucher IDs sold. We recommend having paper vouchers printed and then writing the gift voucher number somewhere on the voucher to provide an extra level of security and a convenient way to spread knowledge of your store through appropriate use of letterhead; however your business needs may differ.

As a result of this process two transaction records are created, one for the sale and another to track the Credit which is represented by the vouchers. This credit can be consumed in future to as payment for a sale.

Payments – Processing

Payments can be processed against sales at any time, either at the time of the sale or anytime after if the sale is on account (typical of mail order sales). Typically at the POS payments are processed as part of the sale cycle. When finished adding items to an invoice press **F7** to enter payments and automatically print a docket (**F6** is to enter a payment without printing a docket). Payments can be for the entire total or any part of the total. Multiple payments and payment types can be entered against any invoice. Invoices can be partially paid, leaving the rest on account (check the company policy and whether the customer is allowed to have credit). Typical payment methods are Cash, Credit Card and EftPOS but Bookmine can also handle payment by other methods including Gift Vouchers and Credits resulting from Returns/Exchanges. See below for details.

Once the **first** payment is processed the sale is **LOCKED**. A payment of \$0 can be entered to LOCK if the entire amount is on account. Once locked the contents cannot be changed. Payments can still be made if required.

Payment using Bookmine gift vouchers

A gift voucher issued from Bookmine can be used as full or part payment against any sale to any customer, even the counter customer (i.e. an unlinked sale). Process the sale as normal. When entering payments select **Gift Voucher** as the payment method. You are prompted for the gift voucher ID. (Even if the customer has lost the voucher the ID can still be found by looking up the original purchaser’s transactions using the Customer Lookup functions. It is left to the discretion of the operator to honour a gift voucher if the customer does not actually present it.)

Once the valid gift voucher ID is entered the Credit amount is automatically partially or fully consumed as full or partial payment against the amount due on the current sale. Any outstanding credit on the gift voucher can be used in the future for one or more payments. If any credit remains it is a good idea to write the amount on the voucher for clarity.

Where appropriate you will be prompted to enter another payment if there is any outstanding debt on the invoice being paid out.

Payment using any External Voucher

This procedure should be used for handling vouchers not issued from Bookmine. Examples are coupons handed out at fairs, special discounts or vouchers issued in a previous system such as eBility, during the transition to the new Bookmine vouchers.

Steps to process payment using an external voucher:

1. Process the sale as normal (linked or unlinked.).
2. When it comes to payment select **Voucher External** as the payment method.
3. You are prompted for the ID of the external voucher, if available
4. You are prompted for the **amount** remaining on the voucher. (At this stage you can optionally enter comments to annotate anomalies, observations).
5. Bookmine now uses the credit against the current sale.
6. If further payment is required you are prompted to enter it as for normal payment. If credit remains after the payment is processed you are prompted to select how the remaining credit is to be dealt with. It can be paid out or retained as a credit against the customers account. The exact procedure will depend on shop policy for vouchers.

Payment using a Return/Exchange Credit

Exchanges can be used a payment method. The credit raised from the return can be automatically used to pay out a new sale. See below for details.

Layby

The following presumes that you are viewing either the POS Summary or POS Terminal screens. From the Main or Details POS interface Click the “All other Trans” (F8) button and select LayBy. You are prompted for the purchasers name (if not already in the database you can create a new contact record for them) and then for the amount and any comment.

Add items to be included in the layby just as you would for a normal sale. Payment proceeds as normal with the purchaser paying an initial deposit. They should be informed about the payment schedule and the conditions applying to every aspect of the layby including any time limit that may void the layby.

Customer Refunds/Exchange

A Return can be processed as an **Exchange**, i.e. as part of a sale, the credit being used automatically to pay out the sale, or as a **Return**, i.e. a separate transaction, where the customer just wants to return items and get a refund for them.

Refunds in BookMine can only be processed against existing sales (i.e. sales processed originally in BookMine). It is advisable to require a receipt to refund unlinked sales as otherwise the operator would have to search through every unlinked transaction for a period in order to find the necessary transaction ID to process the refund. Linked customer sales are much easier to find, and so refunds can be more easily provided without receipts (if that is the policy adopted by management). In any event the refunded items are returned to stock and the user can be either paid out or have a credit raised against them to be used on any future debt. Each business decides its own refund policy.

Processing a Customer Refund:

From the **Summary** or **Sales** POS interface **Click the All other Trans (F8)** button and select **Process a Refund (F7)**. You are prompted for the original docket number. Once entered the Refund interface is displayed showing the list of items in the original sale.

Any item can be refunded against by clicking on the item to select it and then clicking the down arrow (1a). You are prompted for the amount to refund (default is the full discounted amount) and whether to return the item to stock (in mail order mode this may not be appropriate as the refund may be due to the item being lost in the post). Also, the amount refunded can differ from the original sale price.

When all items to be returned have been added, the Refund can be finalised using the **Process Adjustment** button. At this stage a General Credit can be raised, if the initial sale was linked to a customer, or paid out as required. If paying out you are prompted for the payment method.

Processing an Exchange:

In this case the customer is returning items and making another purchase at the same time. The credit from the returned items will be used as payment against the new sale.

Proceed with the sale as normal, i.e. adding items and optionally linking the sale. At payment time select the **Return/Exchange** payment option from the drop down list of payment methods. You are prompted for the invoice id the returns are being made against. Once entered you are presented with the items in the invoice at the top of the screen. Highlight (click on the line item) the first item to be returned and click the **Down Arrow** to add it the return transaction. Repeat for all items being returned.

When all items to be returned are added to the claim click the **Process Adjustment** command button. The credit from the returned items is automatically applied to the new Sale being processed.

If the new sale is not fully paid out you are prompted to enter more payments. If the return credit is more than the new sale value you are asked how the remaining credit is to be paid out. Options are by cash, or for linked sales, by recording a credit on the system.

Note: it is important that all Customer Returns/Exchanges are processed in this way if a Rewards Program is active. Points awarded for sales have to be revoked when items are returned.

Credit Notes – General Credits

The following presumes that you are viewing either the POS Summary or POS Sales screen.

Credit notes can be used to track General customer Credits. They have to be linked to a customer record. Through changing the User Options they can automatically be used up in the future to make payments against debts or even deducted automatically at the point of sale in lieu of other payment methods.

Click the All other Trans (F8) button and select General Credit Note. You are prompted for the customer to link the credit to (if not already in the database you can create a new contact record), the credit amount and any comment, such as the reason.

General Credits (unlike Gift Voucher and Deposit Credits (see below)) can be used to pay any debt the customer accrues and can be manually consumed by paying out using the standard payment button.

Typically you use the Contact lookup (F12) to find a customer's credits.

Customer Deposit against specific stock items

The following presumes that you are viewing either the POS Summary or POS Terminal screen.

Deposits can be placed against specific items and used in the future to pay for those items only. A General Credit could be raised to handle this situation but deposits ensure that the credit is used only against the specific item it was recorded against. The operator can optionally place the item on special order as part of processing a deposit.

A separate deposit transaction must be recorded for each item with a deposit.

Placing a customer deposit on a stock item

From the Main or Details POS screen Click the "All other Trans" (F8) button and select Customer Deposit. Depending on user options you might be prompted for a password. After completing that task you must select the customer who is making the deposit. A new contact record can be created here if they are not already in the contact database. You are then prompted for the item the deposit is being placed against and the amount per item if more than 1 is being ordered. Payment is then processed as normal for the total amount of the deposit.

Making a payment using a customer deposit

When a customer comes in who has unused deposits on one or more items you start a linked sale to them (not to the standard counter customer) as you normally would for this customer. You process the sale as normal.

At payment time Bookmine will automatically consume unused deposit credits as payment against books with deposits. The printed invoice will indicate this. Deposits for items can only be used to pay for those items.

Convert a deposit credit to general credit

To convert a deposit credit into a general credit, i.e. one that can be used against any sale, consume the deposit credit and raise a general credit for the same amount, linked to the customer. Credits can be consumed using the corresponding line item "Pay button on the POS Summary screen or the Transactions Summary screen. Use the Consume Credit button that is displayed.

This process should only be carried out in exceptional cases where an item was ordered and cannot now be sourced for some reason. You do not want deposits to be mistakenly consumed against general stock items. Items may have been ordered specifically on the basis that deposits were placed on them.

Stock Search/Lookup/Maintenance at the POS

Stock Lookup or stock maintenance can be accessed at the POS using the Stock Lookup button (F10 key) from the Summary or Details interfaces. To lookup an item in the core database (or on the external bibliographic database eg Nielson Bookdata, if available) enter criteria in the search screen displayed to find the item. A list of candidate records is displayed based on the criteria. To view details of any of the items displayed click the corresponding Details button. The Stock maintenance interface is displayed with this item active.

From here you can drill down to view the full stock details, cost details and sales history for the item. Special Orders/Requests can be maintained for the item and supply details and histories can be viewed and modified.

Use any and as many combinations of fields required to specify the group of records you want to examine

Multi field search
 Search for items with "marketing: in the title that are currently in stock, where price is between \$35 and \$45.
 1 - Title = *Marketing
 2- Price = Between 35 and 45
 3- On Hand = >0
 4 - Hit F3 to start search
 Hint enter >5 to just see items where you have more than 5 copies on hand.

Display items in the Crime Fiction section that are currently on special order
 1- Main Topic = Crime Fiction
 2- Tick " On Special Order"
 3- F3 to start search

Display items supplied by Allen and Unwin, delivered in the last week, that are currently not in stock.
 1 - Use supplier button
 2 - Use Delivery Based button
 3 - On hand = <1
 4 -Hit F3 to start search

Contact/Customer Lookup/Maintenance at the POS

Just as with stock above you can easily look up and/or edit contact details from the POS.

Click the Contact Lookup (F12) button. The operator is prompted to search for the customer record. Any combination of fields can be used to limit the search. Use Wildcards to search for partial text in the middle of a field.

If the search fails to find any matching records a new customer record can optionally be created. Note: Every effort should be made to find any existing record for the customer before creating another record as duplicate records for a single customer can cause confusion, raising the possibility of information for a single entity being spread across several different records. For example a special order recorded on one of the duplicates may be missed if the operator searches and finds the other duplicate record. Also Credits and debts may not show up properly and managed with ease.

Location related search

Enter criteria into any combination of fields or command. Eg find all customers that have requests who live in NSW and names begin with letters between f and k

Find everyone who has Smith in their last name (*Smith in last name field)

Invoice related Search

Show all customers who live in Victoria who have purchased more than \$100 in the past month who do not have an email address.

1 - State = Vic 2- Use Invoicing related Button 3 - Enter "Is Empty" in the email field

Special Orders from the POS interface

Special Orders and Requests – what is the difference?

- Special orders are for items for which there is an active supplier.
- Requests are for an interest area or a book such as an out of print title or second-hand book for which there is no current active supplier in the database.

How to place a special order

Overview

You select Special order function (F11 on the Start Trans Screen)

Select the customer – you are prompted

Select the stock item or items to be ordered.

Optionally preview the purchase order

To record a Special Order from the POS screen

Click All Other Trans (F8) followed by Special Order (F11). You will then be prompted to select the contact/customer from the database. Remember you can enter their name, email, or whatever piece of information you know will find them quickly; this is useful when the surname is not unusual and you know that by just entering their surname you will get a lot of candidates to choose from. Press F3 to start the search.

- **Select the Customer**

A list of matching candidates is displayed. Select the customer from the list. If the customer/contact does not exist press cancel and you will be asked if you wish to **create** a new record. If you are sure the customer is not already in the database Answer yes to do this.

- **Select the Stock item**

With the customer selected you will be prompted to select the item to be special ordered. A stock search interface (see above) will pop up; enter criteria to find the item. Select the correct one from the list displayed. If the item does not already exist in the database a message will appear telling you that no matching record was found. You are prompted to search again. Search again if you think that you may not have entered the search details correctly – ie if you are sure it is in the database but it didn't come up. If it is not found in your database you will be given the option to add a new title at this point.

- Once selected you are prompted to preview the Purchase Order detail for this order. On this screen you can change the quantity being ordered if you wish to order for stock as well.

- You can special order other items for the same customer when prompted.

Record a Special Order from the Stock Lookup interface.

If you do a stock lookup and find the item you can place a special order directly using the “Place a Special Order Button”. You are prompted for the customer and proceed as before.

Record a Special Order from the Contact Lookup interface.

If you do a Customer lookup and find the person you can place a special order directly using the “Requests/Special Order” button. From here there are several commands available such as placing items on hold, on special order etc.