

# How To Make A Sale

- 1) Go to Transactions>Sales to open a new Invoicing screen.
- 2) Click on the Client Index field and begin typing the customer's Last Name. Hit Enter after typing 4 letters and select customer from drop-down menu. If not capturing customer data, skip this step.  
2b) If customer is new, click on Zoom button to open Client Catalog. Create a new record, save changes and exit to return to Invoicing screen.
- 3) Click on Scan/Entry field and scan item's barcode. If there's no barcode, click F8 to do Item Search.
- 4) Click on Tender Type field and select payment option from menu.  
4b) For split tenders, click on Net field and enter amount of first payment type. Then click on Tender Type field to add a new payment option.
- 5) Press F12 to print receipt and save sale.
- 6) If customer is paying cash, enter amount in XpertChange window and press <Enter> to see change to give. Press <Enter> again to open cash drawer and then one more time to finish printing receipt.

**INVOICING**

F1 Help F2 Exit F3 Customer F4 Matrix F5 Items F6 Quantity F7 Item Disc. F8 Lookup F9 Glob. Disc. F10 Payment F11 PDT F12 Print

Invoice Type: Sales Ticket Store: [ ] Employee: [ ] No. 10000023  
 Price List: Suggested Retail Price Sales Person: 579 A Number: 123 Date: Mar 27, 2005

Photo:  Client: Complete: [ ] Tax ID: [ ]  
 Name: Bob Last Name: Samuels  
 Address 1: 34 West 82nd Street Phone: [ ]  
 City: New York State: [ ]  
 Index: 2 Samuela Bob Client Name: 10000003

Ship To: Address 1: [ ] City: [ ] State: [ ]  
 Phone: [ ] E-Mail: [ ]  
 Ship to: B Client Name: C

ScanEntry	Style	Brand	Color	Size	SecSize	Qty	List Price	% Disc.	Discount	Net Price	Ext Price
443	Kalanda	NineWest	Silver	10.0		1	\$45.99	10.0%	\$4.60	\$41.39	\$41.39

Reference: [ ] Num. Items: 1 Notes: [ ] Subtotal: \$41.39  
 Invoice Flag: [ ] Cr. Ch. Type: Gift Wrapping D Credit Charge: D \$2.00  
 Total Payment: \$16.49 Unpaid Amount: \$0.00 % Disc.: E 0.0% Discount: \$0.00  
 Tax: \$3.10  
 Total: \$16.49

Tender Type	Name	Number	Auth.	Net
Credit Card 4	American Express			4b \$30.00
Cash				\$16.49

## Optional Fields:

- A) If tracking commissions, enter salesperson if different than logged-in employee.
- B) Enter a Ship-To customer if customer is purchasing items for someone else.
- C) Enter a discount if item is on sale.
- D) Enter a Credit or Charge to be added to sale. Typically used for non-inventory charges such as gift wrapping and shipping.
- E) Enter a Global Discount if running a store-wide sale. Applies to every item on Invoice.