

## T8: Managing Your Student Store

### Agenda:

1. When students do the selling
2. Selling things fast
3. Managing your inventory
4. Other Item reports
5. Other thoughts

### When Students Do the Selling

1. You should set up User Codes and Menu Security. With User Codes, Tracks knows who made each specific sale.
  - a. You might only allow access to the Work Screen.
  - b. If you do give the student access to other functions, we suggest at least no access to the following:
    - i. On Account Sales
    - ii. Payments on Account
    - iii. Customer Info – will not display student address/phone info.

**T Menu Security Play School High School**

Groups are highlighted in light gray.

Program	Select All	CM	JS	STU
Select All	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Daily Menu</b>				
---- Work Screen	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
---- Work Screen for PCR	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
---- On Account Sales	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
---- Payments	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
---- Closeout	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Program	Select All	CM	JS	STU
---- Donation Maintenance	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
---- Donor Maintenance	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
---- Customer Info	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

2. Turn on Change Password function so that passwords get changed.

Password Manager  users to change their password every  day(s).

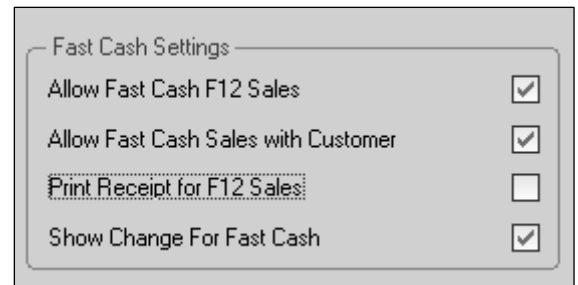
Path for PCR Export

## Selling Things Fast

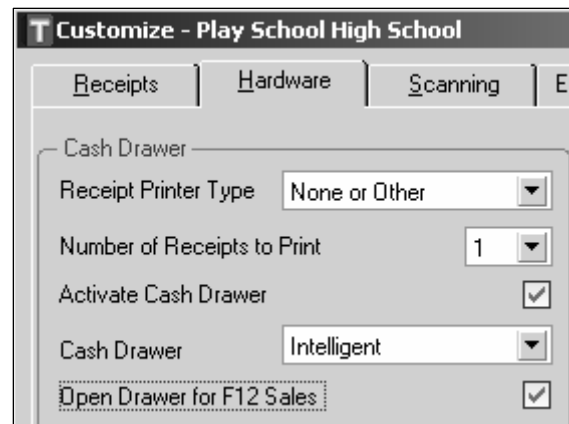
1. STAR Hot Keys on the Work Screen. You have 18 buttons that can each represent a different Item. To sell YEARBOOK, you can
  - a. Click the Yearbook button.
  - b. Press Star-1 (that's "\*1").



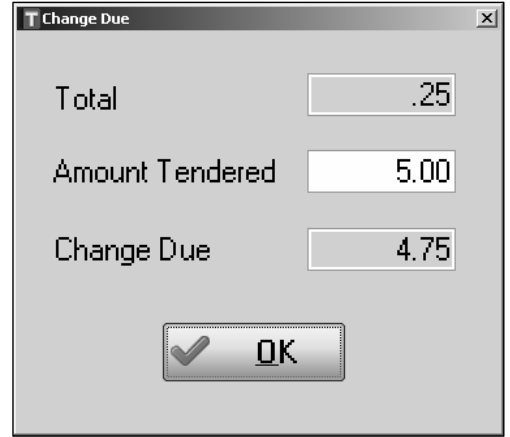
2. Fast Cash Sales – make sales with one keystroke when it's an all CASH sale.
  - a. Options on Receipts tab
    - i. Allow Fast Cash F12 Sales
    - ii. Allow Fast Cash Sales with Customer on screen
    - iii. Print Receipt for F12 Sales
    - iv. Show Change for Fast Cash



- b. Options on Hardware tab
      - i. Open Drawer for F12 sales



- c. F12 displays the amount of Change Due
  - i. When you use F12 with Change option turned on, Tracks pops large “Fast Cash Change” screen.
  - ii. The screen defaults the Amount Tendered to the amount that is due.
  - iii. You can type in the actual amount paid by the Customer.
  - iv. Tracks displays Change Due.
  - v. Press <Enter> or click “OK” to complete the transaction.



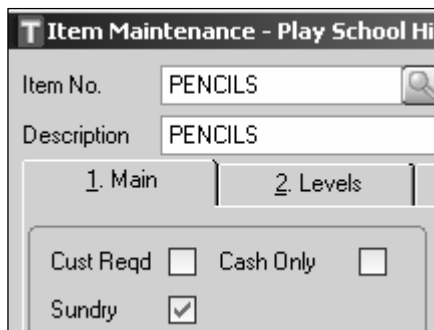
*Note: If you have F12 “Show Change for Fast Cash” turned on, Tracks will always display this little popup window for every sale, requiring at least TWO additional keystrokes to complete a sale.*

If you don’t need to calculate change due, it is faster to turn this option OFF. Then you can simply press F12 to complete a sale – that’s only ONE keystroke.

- 3. Using Sundry Items.
  - a. When you want one receipt for sundry items at the end of the day instead of individual transactions for every time you sold one of these items.

	Receipt #1234	
15	#2 Pencil	3.75
20	Ballpoint Pen	5.00
40	Plastic Ruler	11.45
	TOTAL	\$20.20

- b. In Item Maintenance, make the Item a SUNDRY Type item.



At the end of the day, Tracks will prompt you to print a SUNDRY receipt.

All Sundry items that were sold alone or with other Sundry items will be printed on one receipt.

Sundry items that were sold with non-Sundry items will be printed on individual receipts together with the other items.

*Note: Sundry items and F12 Fast Cash Sales are not necessarily the same thing. You can make an F12 sale for an item that is NOT a Sundry item.*

4. To sell multiple items, use "3 X Item" – Tracks will enter a Quantity of "3" for this Item.
5. Don't use your mouse. Use keyboard shortcuts instead. Refer to session T10: Tracks Shortcuts for details. Every time you take your hands off the keyboard and reach for the mouse, you use up valuable time.
6. Count cash fast and accurately using a Tellermate solution.

## MANAGING YOUR INVENTORY

1. Item Types
  - a. Use matrix items for sizes of clothes and flavors of latte. NEW – Matrix Sales Report!
2. Physical Counts to determine quantity on hand
  - a. Mark items that should appear on Physical Count Worksheet.

Include in Physical Count	<input checked="" type="checkbox"/>
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- b. Print Physical Count Worksheet and count the number of items you have in stock.

Play School H		
PHYSICAL COUNT WORKSHEET		
Item Number	Item Description	Count
<b>Department: SS</b>		
LGCANDY	LARGE CANDY BARS	_____
LOCK	LOCKS	_____
PENCILS	PENCILS	_____
PENNANT	PENNANT	_____
PESHIRT	PE Shirt	_____

- c. Adjust the quantity on hand field on each item to accurately reflect your count.

Reorder Level	<input type="text" value="100"/>
Normal Stock	<input type="text" value="250"/>
Qty On Hand	<input type="text" value="147"/>

- d. Print an Item Valuation Report to see the total value of your inventory. You can sort by Item #, Description, Department, or Grouping Code.

Play School High School								
ITEM VALUATION REPORT BY DEPARTMENT								
Item Number	Description	Type	Qty on Hand	** COSTS **		** PRICES **		Total Price
				Unit Cost	Total Cost	Unit Price	Total Price	
PENNANT	PENNANT	P	73	0.00	0.00	1.50	109.50	
LOCK	LOCKS	S	46	0.00	0.00	5.00	230.00	
LGCANDY	LARGE CANDY BARS	P	50	0.50	25.00	1.25	62.50	

- e. If you order Tracks Items using SchoolBooks purchase orders, the program will update the quantity on hand in Tracks when you receive the invoice in SchoolBooks.

**S Invoice Entry - Play School High School**

Vendor: HARPER (Harper Office Products)

Invoice: 456787 Date: 03/01/06

1. Header | 2. Detail

Type: Item Item: PENCILS Purpose: PENCILS

Auth By: [ ] GL: 4250-40-12

Category: [ ]

Quantity	Original	Prev Rec	Received	Backorder	Unit Cost	Ta
1	0	100	0	.08		

- f. When you print and update the Item Received Journal in SchoolBooks, the quantities in Tracks are updated. The program also updates the Last Cost in Item Maintenance.

Play School High School									
ITEMS RECEIVED JOURNAL									
Item #	Tracks Item Description	SchoolBooks Purpose from Invoice	TRACKS QTYS						
Vendor	Vendor Name	Invoice #	Inv Date	Qty Recd	Cost	Total	Orig Qty	New Qty	
<b>Tracks Items</b>									
<b>PENCILS</b>	<b>PENCILS</b>	<b>PENCILS</b>							
HARPER	Harper Office Products	456787	03/01/06	100	0.08	8.00	147	247	
						<u>8.00</u>			
<b>PENNAHT</b>	<b>PENNAHT</b>	<b>PENNAHT</b>							
HARPER	Harper Office Products	456787	03/01/06	600	0.75	450.00	73	673	
						<u>450.00</u>			
				<b>Report Total</b>		<u><u>458.00</u></u>			

## OTHER ITEM REPORTS

1. Item Price List – shows Dept, Group, Prices, Quantity on Hand.

Play School						
<b>ITEM PRICE LISTING</b>						
Item Range: to <u>ZZZZZZZZZZZZ</u>						
Department Range: SS						
Item Number & Description	Price Level	Type	Department	Group	Price	Quantity
			Start Date	End Date		
<b>TSHIRT - T-SHIRT</b>			<b>SS</b>			<b>1,491</b>
A		R			12.00	
B		R			10.00	

2. Item Reorder Report – shows you how many to order.

Play School High School					
<b>ITEM REORDER REPORT</b>					
Item Number	Description	Normal Stock	Reorder Level	Qty on Hand	Qty Short
<b>Department: SS</b>					
LG CANDY	LARGE CANDY BARS	300	75	50	250
LOCK	LOCKS	40	30	46	(6)
PENCILS	PENCILS	2,500	100	147	2,353
PENNANT	PENNANT	250	25	73	177

## OTHER THOUGHTS:

1. Maintain multiple cash drawer inserts so you can switch them easily. You can get lids for them, keep them ready to go with a pre-counted opening bank. Keep them in your safe.
2. Leave your cash drawer open at night to prevent damage if there is a break in and someone tries to pry it open. If it is already open, they won't hurt it.
3. Set up Item numbers that make sense for your store. Some stores will want to track sales of Snickers and Kit-Kat bars specifically. Other stores will simply set up an item called CANDY50 (Candy for \$.50). It's up to you.

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NOTES:

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