



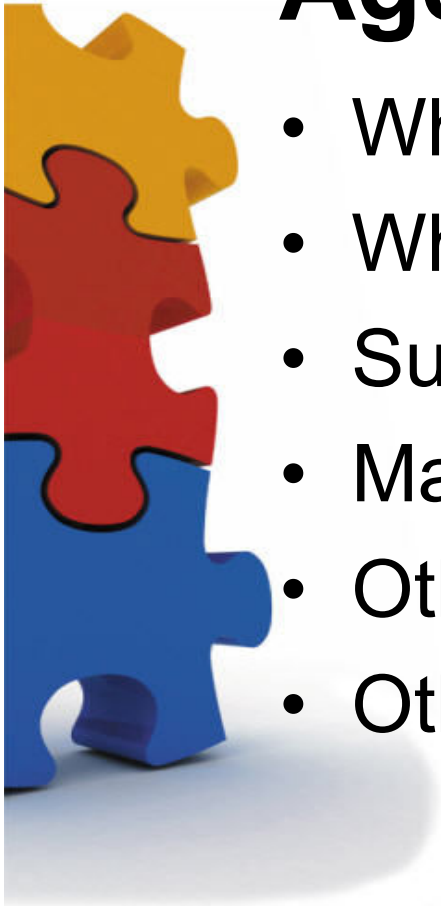
**Tracks – T7**

# **Managing Your Student Store**



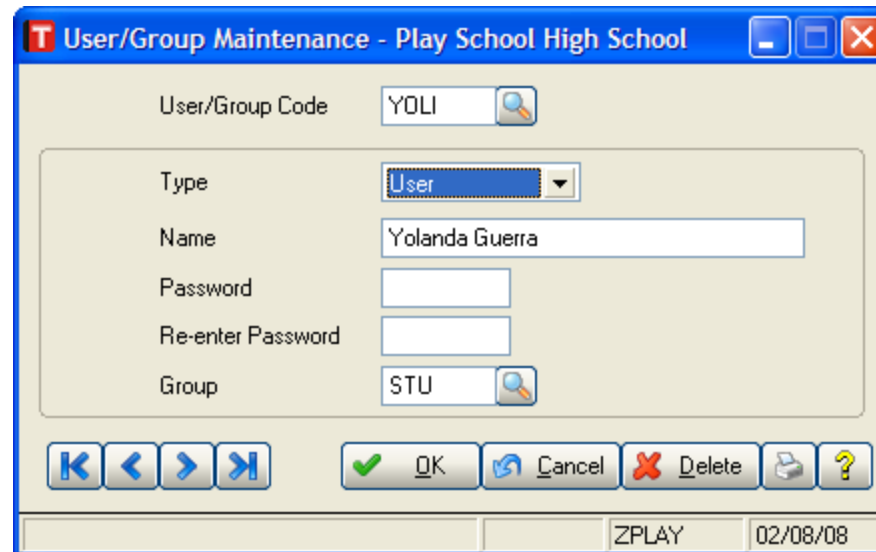
# Agenda

- When students do the selling
- When you have to sell FAST
- Sundry Items
- Managing your inventory
- Other Item reports
- Other thoughts



# When Students Do the Selling

- Always assign & use User Codes.
  - Tracks knows who made each sale.
  - Force users to change passwords.
  - Management / System Security / User Group Maintenance.



**User/Group Maintenance - Play School High School**

User/Group Code: YOLI

Type: User

Name: Yolanda Guerra

Password:

Re-enter Password:

Group: STU

Navigation: [Home] [Back] [Forward] [End]

Actions: [OK] [Cancel] [Delete] [Print] [Help]

Status: ZPLAY 02/08/08



# When Students Do the Selling

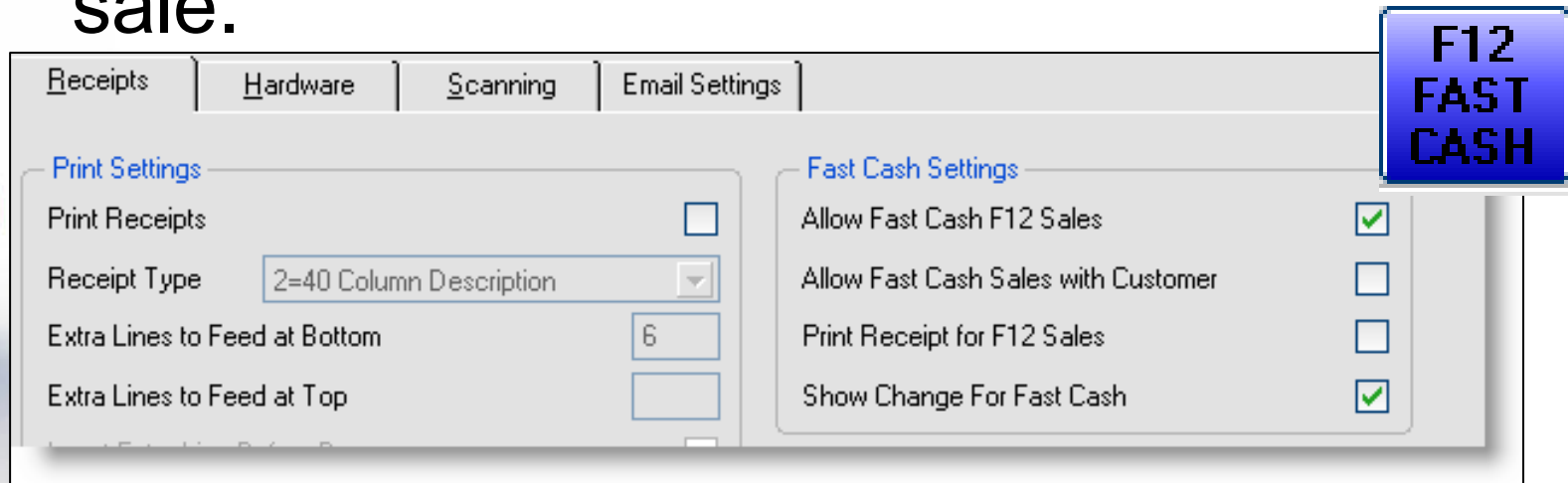
- Use Menu Security. Management / System Maintenance / System Security / User Group Menu Security.
  - Only allow access to the Work Screen.
  - Or deny access to:
    - On Account Sales
    - Payments on Account
    - Customer Info

Program	Select All	BOSS	STU
Select All	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Daily Menu</b>			
---- On Account Sales	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
---- Work Screen	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
---- Payments	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
---- Closeout	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
---- Daily Sales Inquiry	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
---- Daily Data Backup	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
---- Change User	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
---- Change School	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
---- PCR Export to Daughter	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
---- PCR Import from Daughter	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
---- Import From RevTrak	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<b>Customer Menu</b>			
---- Customer Maintenance	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>



# Fast Cash Options

- Management / Customize / Workstation Settings.
- Fast Cash Sales – when it's an all CASH sale.

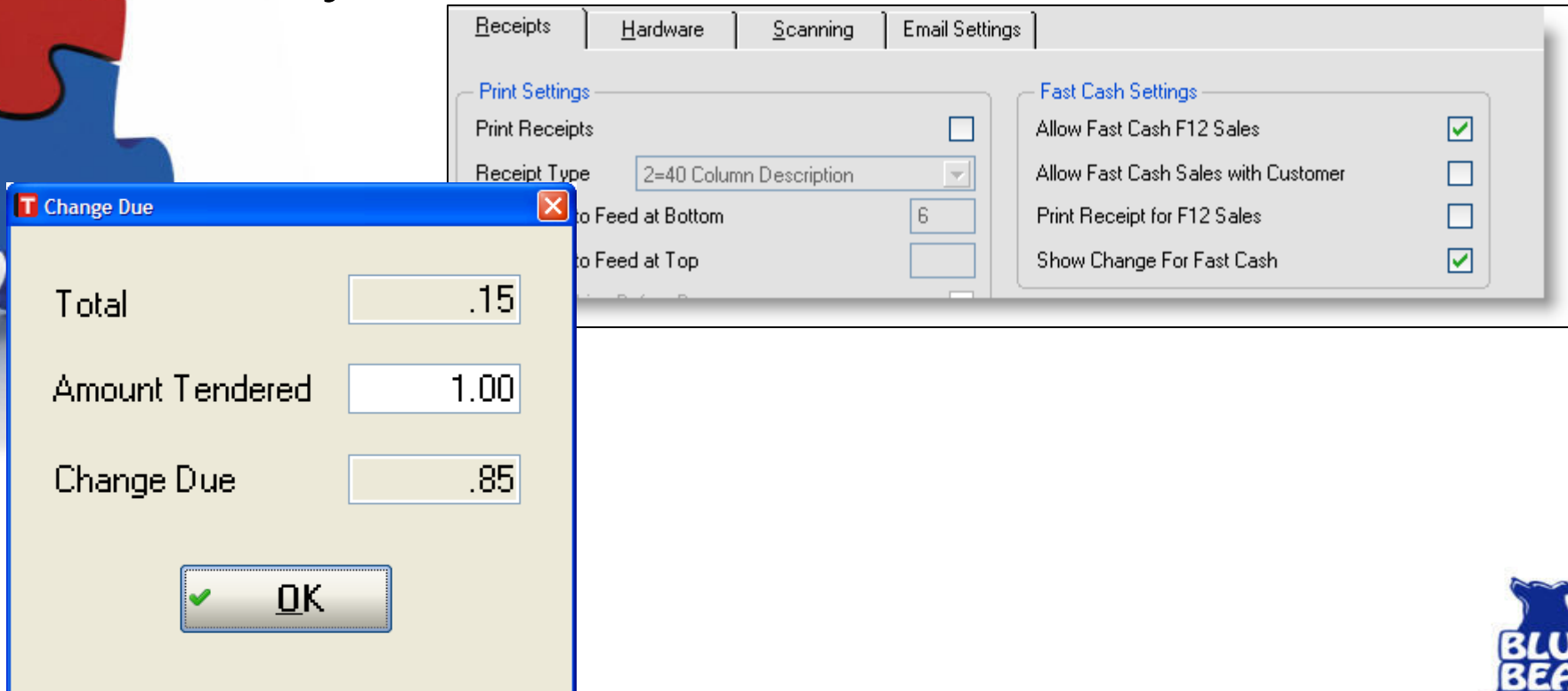


- Options for receipt printing and cash drawer (on Hardware tab).



# Show Change for Fast Cash

- Displays this popup.
- Requires at least two additional keystrokes.



The image shows a software interface with a settings window and a 'Change Due' popup. The settings window has tabs for Receipts, Hardware, Scanning, and Email Settings. The 'Fast Cash Settings' section includes:

- Allow Fast Cash F12 Sales
- Allow Fast Cash Sales with Customer
- Print Receipt for F12 Sales
- Show Change For Fast Cash

The 'Change Due' popup displays the following information:

Total	.15
Amount Tendered	1.00
Change Due	.85

An 'OK' button with a green checkmark is located at the bottom of the popup.





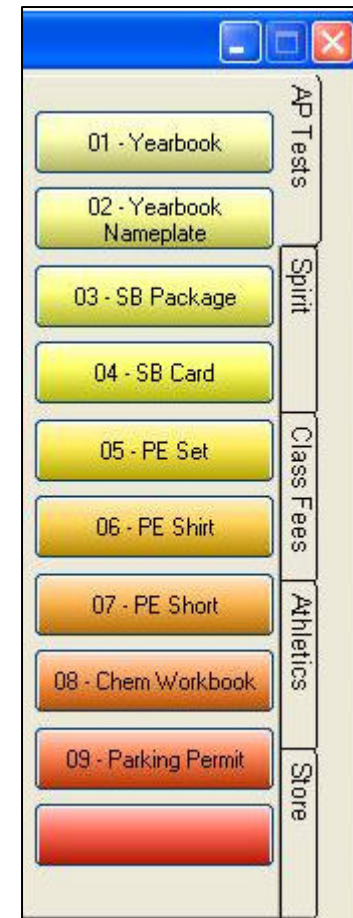
# What's **NEW** with **Star Buttons**?

- They are User Specific!
  - Student Store has their items.
  - ASB office has their items.
- There are more of them!
  - Five tabs and you name them.
  - 10 buttons on each tab.



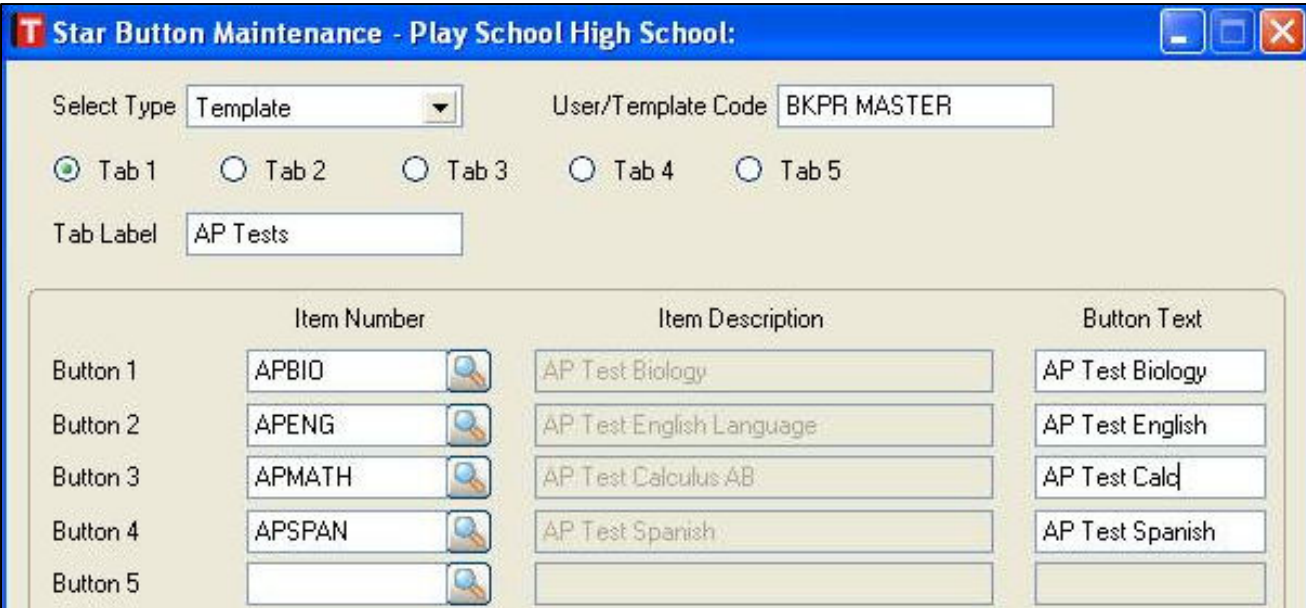
# Star Buttons on Work Screen

- Management / System Maintenance / Star Button Maintenance
- Star Buttons on the Work Screen
  - Use Mouse or Keyboard
  - Type - \*XX
- Why use them? Speed!



# Star Buttons – User Specific

- New button setup options:
  - Unique - Set up buttons for one user from scratch (or load from a template and modify).
  - Template – set up for many users.



	Item Number	Item Description	Button Text
Button 1	APBIO	AP Test Biology	AP Test Biology
Button 2	APENG	AP Test English Language	AP Test English
Button 3	APMATH	AP Test Calculus AB	AP Test Calc
Button 4	APSPAN	AP Test Spanish	AP Test Spanish
Button 5			



# Star Buttons – User Specific

- New User Code Options.
  - Choose Star Button Type.
  - If a pre-set Template, choose Template Code.



**T** User/Group Maintenance - Play School High School

User/Group Code: BE

Type: User

Name: Bonnie Edwards

Password: \$\$\$\$

Re-enter Password: \$\$\$\$

Group:

Star Button Type: Template

Template Code: BKPR MASTER

Navigation: [Back] [Forward] [Home] [Refresh]

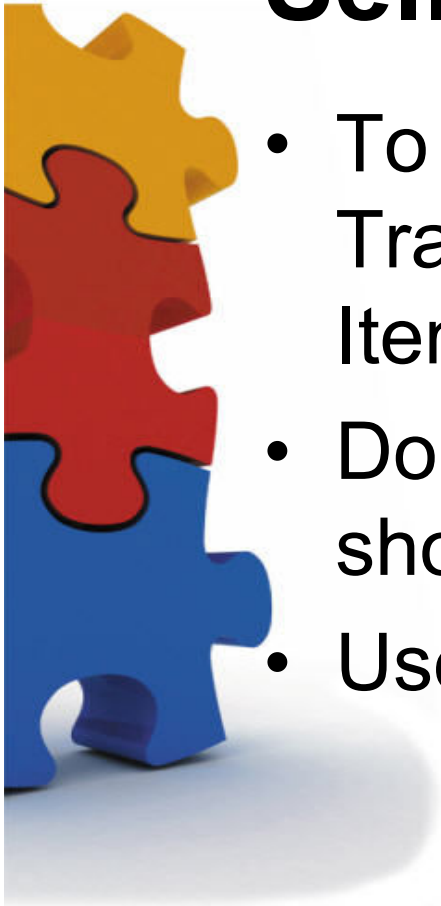
Buttons: [OK] [Cancel] [Delete] [Print] [Help]

Status Bar: BE ZPLAY 03/02/08



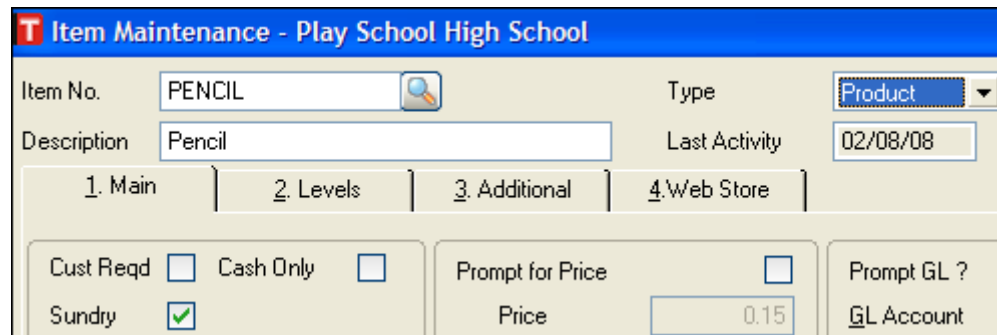
# Selling Items Quickly

- To sell multiple items, use “3 X Item” – Tracks will enter a Quantity of “3” for this Item.
- Don’t use your mouse. Use keyboard shortcuts instead.
- Use your scanner.



# Using Sundry Items

- In Item Maintenance, mark the Item **SUNDRY**.



Item Maintenance - Play School High School			
Item No.	PENCIL	Type	Product
Description	Pencil	Last Activity	02/08/08
1. Main   2. Levels   3. Additional   4. Web Store			
Cust Reqd	<input type="checkbox"/>	Cash Only	<input type="checkbox"/>
Sundry	<input checked="" type="checkbox"/>	Prompt for Price	<input type="checkbox"/>
		Price	0.15
			Prompt GL ?
			GL Account

- Sundry items that are sold with non-Sundry items are printed on individual receipts together with the other items.



# Using Sundry Item Option

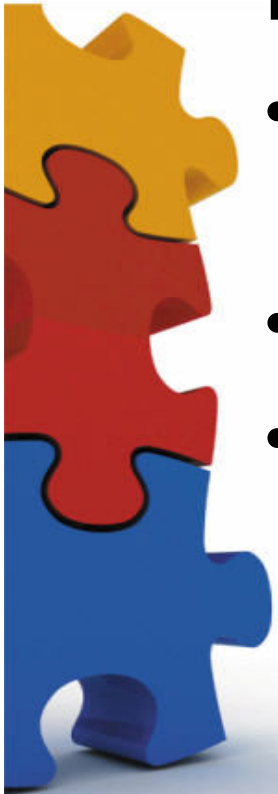
- Prints one receipt for all Sundry items at end of day instead of individual transactions for each sale.

Play School High School 13240 Evening Creek Drive South San Diego, CA 92128 800-954-2583			
=====			
			#SUNDRY
=====			
RCP. #0000315		03/02/07 1:5pm	
QTY	DESC	PRICE	TOTAL
10	Pencil	.15	1.50
27	Pennant	1.50	40.50
28	Bottled Water	1.00	28.00
	TOTAL:		70.00
=====			
PAYMENT TYPE:			
	70.00	Cash	
-----			
	70.00	TOTAL	
=====			



# Managing Your Inventory

- Use matrix items for sizes of clothes and flavors of sports drinks.
- Include on Physical Count Worksheet.
- Print Physical Count Worksheet and count the number of items you have in stock. (Reports / Item Reports / Physical Count Worksheet.)
- Adjust the quantity on hand field on each item to accurately reflect your count.



# Managing Your Inventory

- 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.
- For further information please see our S6: Encumbrances, POs and Invoices breakout session.

Type	Item	Item	TSHIRT	Purpose	T-Shirt		
Auth By	Hilda Weston	GL	2810-30-00		Marketing Club		
Category							
	Original	Received	Backorder	Unit Cost	Taxable Rate	Tax	Freight
Quantity	25	0	0	10.00	<input type="checkbox"/> .000 %	.00	.00
Amount	.00	.00	.00				
				OK	Undo	Ins	Del



# Item Valuation Report

- Reports / Item Reports / Item Valuation Report.
- Shows the total value of your inventory.
- Sort by Item #, Description, Department, or Grouping Code.

## ITEM VALUATION REPORT BY ITEM NUMBER

Item Number	Description	Type	Qty on Hand	** COSTS **		** PRICES **	
				Unit Cost	Total Cost	Unit Price	Total Price
138548464U	Used Textbook English One	P	22	56.00	1,232.00	75.00	1,650.00
AFBTICK	Adult Football Ticket	S	0	0.00	0.00	10.00	0.00
APBIO	AP TEST BIOLOGY	S	0	0.00	0.00	75.00	0.00
APENG	AP TEST ENGLISH	S	0	0.00	0.00	75.00	0.00
APMATH	AP TEST MATH	S	0	0.00	0.00	75.00	0.00
APSPAN	AP TEST SPANISH	S	0	0.00	0.00	75.00	0.00
ART15	Art Fee 15	S	(18)	0.00	0.00	15.00	(270.00)

# Item Reorder Report

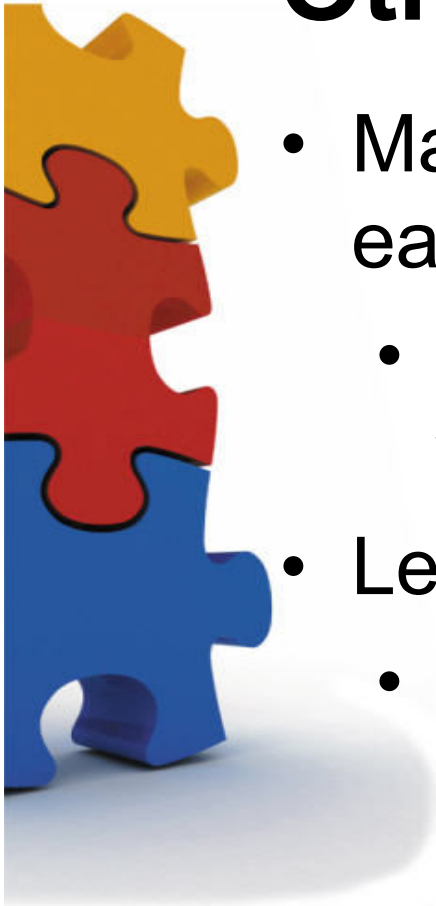
- Reports / Item Reports / Item Reorder Report.
- Print the Item Reorder Report to see quantities to order.
- Sort by item or department.

Play School High School					
ITEM REORDER REPORT					
Item Number	Description	Normal Stock	Reorder Level	Qty on Hand	Qty Short
PENCIL	Pencil	250	75	51	199
PENNANT	Pennant	250	25	22	228
PESET	PE Set	0	0	0	0
PESHIRT	PE Shirt	600	250	111	489



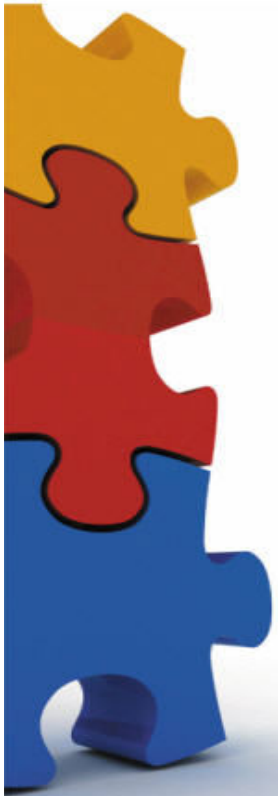
# Other Thoughts

- Maintain multiple cash drawer inserts for easy switching.
  - Get lids for them & keep them ready with a pre-counted opening bank.
- Leave empty cash drawer open at night.
  - With a robbery attempt, if it's already open, they won't hurt it.



# Other Thoughts

- Set up Item numbers that make sense for you!
  - Track sales of carrots & celery specifically.
  - Or set up an item called VEGGIE50 (Veggie for \$.50).
- Think about your Closeout options.
  - One big Closeout for the day.
  - Workstation-based Closeouts throughout the day.





# More NEW tricks for your Store

- NEW! Card Present Sales.
- NEW! Option for “Allow sales to customers with a balance due” in Item Maintenance.
- NEW! Matrix Breakdown on a new Matrix Sales Item Report subtotals of sales for Matrix items.





# Let's Walk Through It! Or Questions & Answers

