ELECTRICAL TICKET ENTRY

Step 1:   **Branch number**: The branch number you are located at will automatically come up on the screen. You may change it to a different electrical branch number if desired. TICKETS SHOULD ALWAYS BE WRITTEN USING THE BRANCH NUMBER THAT THE PRODUCT IS SHIPPING FROM.

Step 2:   **Cash customer number**: Enter the cash customer number for your branch. To determine your cash number, you need to put your branch number followed by whichever price column you are selling from.
The columns are as follows:
1- Highest column (very rarely used)
2- Retail column (used for retail and non repeat customer sales)
3-Wholesale/Contractor column (used for all contractor and regular customers)
(ex. of cash customer would be 13 for branch 1 column 3 or 153 would be branch 15 column 3)
Account customer number: Enter the account number. If you do not know the account number, you may enter a ? in the field. This will take you to customer number search. By entering the beginning letters of an account, you can get your customer number. You will then be prompted to enter a line number and the account number will be entered into the field for you. <u>Please read all comments that appear on the screen relating to the account customers EVERY time.</u>
Once a ticket number is issued, it CAN NOT be changed from cash to account or vise versa.

Step 3:   **Ticket number:** If you are entering a new ticket, return through this field. If you are editing an existing ticket, put your existing ticket number in this field. Note- you can not re-enter a back order ticket threw this option.

Step 4:   **Type of order:** These options will appear:
(I)mmediate- Any order that you have all of the material for and are shipping at the point of sale. If this order is a cash customer, it must be paid for at the time of receipt. ***NO PRODUCT SOLD TO A CASH CUSTOMER SHOULD LEAVE METRO PREMISES WITHOUT FULL PAYMENT FOR PRODUCT.***
(W)ill Call- Any order that is called in, placed at the counter or otherwise sold that is not going out at the time the ticket is being written. See chapter on SHIP CONFIRMATION and/or WILL CALL UPDATE to complete this ticket. ***NOTE: ALL SPECIAL ORDER ITEMS REQUIRE A 50% NON-REFUNDABLE DEPOSIT FOR METRO TO PLACE THE ORDER. THESE SPECIAL ORDER ITEMS ARE NON RETURNABLE.***
(D)elivery-Any order that is being delivered to a customer. If the order is a cash customer, all payment criteria previously stated applies. If the ticket is not paid before delivery, the driver **MUST** pickup payment upon delivery or the product can not be left at the job site. ***PLEASE BE SURE TO GIVE ACCURATE AND COMPLETE DELIVERY INSTRUCTIONS ALONG WITH A PHONE NUMBER/NEXTEL NUMBER FOR EASIER CUSTOMER CONTACT.***

Step 5:   **Ship to:**
Fill in the following for cash customers:
Name (customer or company name)
Phone Number/Nextel number for contact
Address when necessary for delivery and or directions to job/business

Fill in the following for account customers:
Phone number/Nextel number for contact
Job name/Name of person placing the order
Delivery instructions/address when necessary

Step 6: **Type of shipment**: (W)arehouse ticket is for anything shipping from our stock . (D)irect ticket is anything shipped from the factory directly to our customer. **Once a ticket number is issued, it CAN NOT be changed from direct to warehouse or vise versa.**

Step 7: **Ship via**: Enter method of delivery if information is needed.

Step 8: **Salesperson**: Enter your salesperson number in this field.

Step 9: **Customer PO Number:** Always ask the customer if a PO number is needed. If your PO number is too long to fit in this field, type "see above" or "see below" and fill it in elsewhere on the header or the body of the ticket. This field is very important for some customers (some will not pay us if there is not a PO on the invoice). Please get in the habit of always asking if the customer needs a PO listed on the invoice.

Step 10: **State Tax:**
For cash customers- Tax will be charged at a rate depending upon which store the ticket is being written from. This tax rate is set by the state/city. If a customer is tax exempt, you may clear this field or put in NT for no tax. The customer **MUST** provide a TAX EXEMPT CERTIFICATE from the state (*retail sales licenses are not acceptable*) in order to forgo being charged tax. If the customer does not have this form, see your manager or the main office for the proper form to be filled out to waive sales tax.

For account customers- The account number determines whether or not a customer is charged tax depending on the paper work provided by them to our main office. If a customer claims to be tax exempt, they must call the credit department and discuss the necessary paperwork needed with them.

Step 11: **Operator**: Enter your initials.Leave remaining fields as they are when you started the ticket.

Step 12: **Correct Y/N**: When everything is entered, the ticket will ask correct y/n.
If everything is correct, answer y and proceed on with the ticket.

Step 13: **Body of ticket**: These are the different types of sales/options you can enter:
1-*Stock item*   Any item listed in price file.
2-*Non-stock item*   Any item that is not listed in price file and is to be ordered specially.
3-*Comment line*   Non product line to enter any special comments pertaining to order.
4-*Special charge* Options for special non product charges.
      1-Labor
      2-Lamp repair
      4-Install labor
      6-Gift certificate
      8-Allowance (only when told to use by the main office)
7-*View total of sale*
8-*Payment screen*

9-*Freight charge*
L-*List items entered on order*
S-*Catalog search*
D-*Delete line*
?-*List of options available*
SC-*Ship Confirmation* (this option will only take you to ship confirmation if the ticket has been printed at least once.)

Example of how to enter a stock item on a ticket:
Type: 1   press tab
Part #: /PS1594W   press tab/enter
Ord: 100   press tab
Ship: Enter the amount you are really shipping, if it is 0 then enter 0 or leave blank.
Price: Check to verify that price is correct for what has been quoted to customer if applicable.
Continue entry of items until completed.
Type: 8   It will either go to ticket print for account tickets or the payment screen for cash tickets.
When entering a stock item, if you have ordered more of a product than you can fill from stock, this option will appear:
Insufficient stock to cover order
Request from
  (S)pecific Branch -enter branch number to request product. Enter how many you wish to order-it will only allow you to request as many as you have sold on this particular ticket. When the transfer comes in at your store, the paper work will have the ticket information printed on it to assist in locating the customer that the product belongs to.
  (B)uy-this will send a request to the purchasing department for the product to be ordered. When the ordered product comes in, it will be transferred to your store from the receiving department. The paperwork will have the ticket number on it.
  (N)o request-this will allow you to do nothing to cover the unavailable stock.
Example of how to enter a non-stock item on a ticket:
Type: 2   press tab
Part #:   Enter six digit vendor number of product and a five digit item number. (ex. for a P&S9236 you would enter 78500792369/ NEVER use 00000) press tab
Desc: Enter   PS9236 and a valid description for the purchasing department to verify the correct product is being ordered. Press enter
Ord: enter the quantity to be ordered and send a buy request.
Continue with ticket as detailed above. Make sure the price, cost, and unit of measure (e/c/m) of the item are entered and are correct.

Step 14:   **Payment/completion of cash ticket:**
Type: 8   Payment Type: **Please be sure to use the correct method of payment to ensure proper daily cash drawer balancing**. DO NOT POST PAYMENT TO ANY TICKET IF YOU DO NOT HAVE PAYMENT IN HAND. ALWAYS RUN CREDIT CARD BEFORE POSTING PAYMENT INCASE CARD IS DECLINED.
Cash
Check
CCard- Mastercard/Visa
Dscvr
Amex-American Express

Usecr-Use existing credit**(ONCE A CREDIT IS USED FOR PAYMENT, *IT CAN NOT BE CHANGED*. DOUBLE CHECK YOUR CREDIT NUMBER BEFORE POSTING!!!!!!)**

Pckup-Payment on pickup for will call tickets

Step 15:   **Correct y/n:** Check payment information**.**

Step 16:   ***Print ticket***

ALL TICKETS MUST BE SIGNED BY THE CUSTOMER! NO EXCEPTIONS!!!!!

LIGHTING TICKET ENTRY

Step 1: **Branch number**: The branch number you are located at will automatically come up on the screen. You may change it to a different lighting branch number if desired. TICKETS SHOULD ALWAYS BE WRITTEN USING THE BRANCH NUMBER THAT THE PRODUCT IS BEING SHIPPED FROM. WHOLE HOUSES AND LARGE ORDERS BEING SHIPPED FROM CENTRAL WAREHOUSE SHOULD USE THE BRANCH NUMBER THE TICKET IS ORIGINATED FROM.

Step 2: **Cash customer number**: Enter the cash customer number for your branch. To determine your cash number, you need to put your branch number followed by whichever price column you are selling from. For repeat cash customer numbers, you can put a ? in the customer field which will take you to customer search. You can then pull all existing information for a cash customer onto your new ticket. (ex. of cash customer would be 163 for branch 16 column 3/builder price or 72 would be branch 7 column 2/retail customer)
The columns are as follows:
1- Retail column (used for retail and non repeat customer sales)
2- Retail -10% (used for retail customers who are being offered additional discount)
3-Wholesale/Contractor column (used for all contractor customers)

Account customer number: Enter the account number. If you do not know the account number, you may enter a ? in the field. This will take you to customer search. By entering the beginning letters of an account, you can get your customer number. You will then be prompted to enter a line number and the account number will be entered into the field for you. If you are not sure how a name is spelled, you can enter … and a few letters of a name and you will be given any accounts that have those letters in them. <u>Please read all comments that appear on the screen relating to the account customers EVERY time.</u>
Once a ticket number is issued, it CAN NOT be changed from cash to account or vise versa.

Step 3: **Ticket number:** If you are entering a new ticket, return through this field. If you are editing an existing ticket, put your existing ticket number in this field. Note: you can not edit a back order ticket through this program.

Step 4: **Company/Individual/Search**: (This comes up for cash customers only.)
Enter all pertinent information the customer is willing to give. The more information you enter, the easier it is to reference the customer for completion of the existing order. If anything is entered incorrectly, the opportunity to correct the information is given before continuing to the next ticket step.

Step 5: **(W)hole house/(P)revious Whole house/(D)isplay/(S)pec/(L)ighting:** At this point the type of ticket that is being written needs to be determined.
Whole house are any tickets that are an order for a large quantity of fixtures for a new home or a remodel. Many of these orders have a builder and an allowance involved.
Previous Whole house should be used when a customer who has previously built a home (within a year) and the salesperson still wants to offer contractor pricing. This option will request the previous whole house ticket number.
Display home should be used if a builder is building the home to use for display purposes of selling additional homes. These tickets can only be account tickets.
Spec home should be used if the builder is building the home to sell and is not going to use it for display purposes. These tickets can only be account tickets.

Lighting ticket is any cash or account customer coming in to make any other kind of purchase.

Step 6A: **Type of order:** These options will appear (for P/D/S/L tickets):
(I)mmediate- Any order that you have all of the material for and are shipping at the point of sale. If this order is a cash customer, it must be paid for at the time of receipt. ***NO PRODUCT SOLD TO A CASH CUSTOMER SHOULD LEAVE METRO PREMISES WITHOUT FULL PAYMENT FOR PRODUCT. THIS INCLUDES CASH ACCOUNTS.***
(W)ill Call- Any order that is called in, placed at the counter or otherwise sold that is not going out at the time the ticket is being written. See chapter on SHIP CONFIRMATION to complete this ticket. ***NOTE: ALL SPECIAL ORDER ITEMS REQUIRE A 50% NON-REFUNDABLE DEPOSIT FOR METRO TO PLACE THE ORDER.THESE SPECIAL ORDER ITEMS ARE NON-RETURNALBE.***
(D)elivery-Any order that is being delivered to a customer. If the order is a cash customer, all payment criteria previously stated applies. If the ticket is not paid before delivery, the driver **MUST** pickup payment upon delivery or the product can not be left at the job site. See chapter on SHIP CONFIRMATION to complete this ticket. ***PLEASE BE SURE TO GIVE ACCURATE AND COMPLETE DELIVERY INSTRUCTIONS ALONG WITH A PHONE/NEXTEL NUMBER TO REACH CUSTOMER IF NECESSARY.***

6B Step*:*   **Type of order**: These options will appear on whole house only:
       Builder Number
       Builder Name (this will automatically fill in)
       Closing Date
       Allowance
       Subdivision Name
       Lot
       Unit
       Model/Plan
       Located (this is for delivery purposes and should always be as specific as possible)
All of the information is VERY important to service the customer as efficiently as we can.

Step 7:   **Split this ticket into multiple tickets Y/N (THIS OPTION IS NOT AVAILABLE ON REGULAR LIGHTING TICKETS, ONLY ON SPEC, DISPLAY, OR WHOLE HOUSE): If you have any questions regarding how this should be utilized, please contact your manager!**
If no is answered, you <u>can not</u> split this ticket in the future! Continue on to the **Step 8** of ticket entry.
If yes is answered, here are the following <u>basic</u> guidelines:
Ticket Splitting

The purpose of splitting tickets is to track multiple shipments under the same ticket number, for Whole House, Spec or Display tickets with rough-ins, cans, lights, fans and bulbs.

The lines on a -00 ticket can be split to 50 (rough-ins), 60 (1st post shipment), and 70 (2nd post shipment) tickets which will run through the system as looking like an N/C. All payments are posted on the -00,-01 etc. versions of the ticket. The -00,-01 etc ticket retains all price extensions of the sale.

In order to identify an item to go to a split ticket, enter a line item as usual and in the field of POST, enter an R for rough in ticket, 1 for 1st post shipment ticket, or a 2 for a 2nd post shipment ticket. If POST is left blank, the item will go on the -00 version of the ticket.

When you have completed entry of a ticket with lines flagged to split, you will be asked if you want to generate the split tickets now. Saying no to split now will allow you to print a working copy of a ticket without actually creating the 50, 60 or 70 split tickets yet. Saying yes to split now will give the ability to identify the shipping branch of each 50, 60, or 70 tickets that have been created. You can move any one or more of the split tickets between the home branch and central warehouse only. Once a split ticket has been generated you can no longer move between warehouses. *For best results, do not split the ticket until you are certain there will be no more changes.*

When the ticket prints, the -00 version will identify (under line number) the split version the item will be located on. It will be identified by an R for the -50 version of the split (or the rough-in shipment), 1 for the -60 version of the split (or the 1st post shipment) and 2 for the -70 version of the split (or the 2nd post shipment).

Checking is done for will called lines flagged to move to a split ticket, and if the split is not shipping from the same branch as the -00 ticket, the print will not continue until these lines are un-will called.

Once the split tickets are generated you cannot directly add to or delete from them. Order entry will only allow printing of the 50, 60 and 70 tickets. In order to add to or delete from the generated split tickets you must make the changes on the -00 ticket as long the split tickets have not had shipments. The lines **deleted** from the -00 ticket will happen **immediately** on the split ticket but you **must print** the -00 ticket before the **added** lines will show up on the 50, 60 or 70 tickets.

Until a line is generated to a split ticket, you can change its line code between types of splits, 50 (R for rough-in), 60 (1 for 1st post shipment), 70 (2 for 2nd post shipment) or blank for no split (these items will remain on the -00 version).

Unlike backorders, all line numbers on the splits and their backorders will remain the same as the -00 line number. You can have up to nine backorders for each type of split ticket (ex. -50 can have between -51 to -59).

Quotes can have lines designated with split codes and when the quote is made into an order, these lines can generate split tickets once the new order is printed.

The original ticket (-00,-01 etc.) will be checked to see if it has enough allowance or payment before shipment can be made on the 50, 60, or 70 tickets. On whole house tickets 60's & 70's can't go out until the -00 is paid in full.

You also can't post a payment to any split ticket or their backorder – they are shipping copies only. All payments must be posted on the -00, -01 etc. versions of a ticket.

Step 8:   **Ship to:**
Fill in the following for cash customers when applicable:
Job name
Additional Phone Number/Nextel number for contact
Address when necessary for delivery and or directions to job/business
Fill in the following applicable information for account customers:
Lot number/Subdivision name
Name of person placing the order/Job name

Phone number/Nextel number for contact
Delivery instructions/Address when necessary
On whole house installation tickets this information is ALWAYS required (it should ALWAYS be listed in this order):
Lot number/Subdivision
Builder and original ticket number
New street address/current phone number (if does not match bill to info)
Customers full name

Step 9:   **Type of shipment**: (W)arehouse ticket is for anything shipping from our stock . (D)irect ticket is anything shipped from the factory directly to our customer. **Once a ticket number is issued, it CAN NOT be changed from direct to warehouse or vise versa.**

Step 10:   **Ship via**: Enter method of delivery if information is needed.

Step 11:   **Salesperson**: Enter your salesperson number in this field.

Step 12:   **Customer PO Number:** Always ask the customer if a PO number is needed. If your PO number is too long to fit in this field, type "see above" or "see below" and fill it in elsewhere on the header or the body of the ticket. This field is very important for some customers (some will not pay us if there is not a PO on the invoice). Please get in the habit of always asking if the customer needs a PO listed on the invoice. FOR ALL BUILDERS WHO *REQUIRE* A PO, THIS FIELD SHOULD NEVER BE SKIPPED. KEEP IN MIND THAT THE PO SHOULD MATCH THE TOTAL OF THE TICKET EXACTLY. For some builders, very specific information is required in this field or there are discount credits involved, please see your manager.

Step 13:   **Order Date**: The order date should never be changed.

Step 14:   **State Tax:**
For cash customers-Tax will be charged at a rate depending upon which store the ticket is being written from. This tax rate is set by the state/city. If a customer is tax exempt, you may clear this field or put in NT for no tax. The customer **MUST** provide a TAX EXEMPT CERTIFICATE from the state (*retail sales licenses are not acceptable*) in order to forgo being charged tax. If the customer does not have this form, see your manager or the main office for the proper form to be filled out to waive sales tax.

For account customers- The account number determines whether or not the customer is charged tax depending on the paper work provided by them to our main office. If a customer claims to be tax exempt, they must call the credit department and discuss the necessary paperwork needed with them.

Step 15:   **Operator**: Enter your initials.

Step 16:   **Want Date:** This field should be filled in with the approximate date that the product will be needed by the customer. It will not typically be changed for a retail sale customer. The purchasing programs/department will use this date to determine the approximate date that product on these tickets will be ordered. Please keep in mind that this is NOT the closing date. It will be approximately 4 weeks prior to closing.

Step 17:   **Ship from:** This option should be changed to 5 on any ticket that is being shipped from Promenade**.** If the product is shipping from the branch you are located at, please leave it alone. The

computer will not allow any ticket to be shipped from any other branch than Promenade or your own.

Step 18:   **Accept Backorder**: This field should not be changed.

Step 19:   **Correct Y/N**: When everything is entered, the ticket will ask correct y/n.
If everything is correct, answer y and proceed on with the ticket.

Step 20:   **Body of ticket**: These are the different types of sales/options you can enter:
1-*Stock item*   Any item listed in price file.
> **1D**-*Display Item (any fixture/accessory sold from display that is NOT red tagged)*
> **1R**-*Red Tag Item (any NON display item that is red tagged)*
> **1T**-*Red Tag Display Item (any red tagged fixture/accessory that IS red tagged on our display)*

2-*Non-stock item*   Any item that is not listed in price file and is to be ordered specially. ***NOTE: ALL SPECIAL ORDER ITEMS REQUIRE A 50% NON-REFUNDABLE DEPOSIT FOR METRO TO PLACE THE ORDER.THESE SPECIAL ORDER ITEMS ARE NON-RETURNALBE.***
3-*Comment line*   Non product line to enter any special comments pertaining to order.
4-*Special charge* Options for special non product charges.
> **1**-Labor
> **2**-Lamp repair
> **4**-Install labor
> **6**-Gift certificate
> **8**-Allowance (only when told to use by the main office)

7-*View total of sale*
8-*Payment screen*
9-*Freight charge*
L-*List items entered on order*
S-*Catalog search*
D-*Delete line*
?-*List of options available*
SC-*Ship Confirmation* (this option will only take you to ship confirmation if the ticket has been printed at least once.)

Example of how to enter a stock item on a ticket:
Type: 1   press tab
Part #: /KH210WH   press tab/enter
Post: This option is only for split tickets. You will only be able to make an entry in this field if it you entered the option to split as a yes. R for rough-in, 1 for 1st post shipment (ex. bulbs), 2 for 2nd post shipment (ex. fans).
Room: Room location MUST be entered on all whole house tickets. This will aid the electricians hanging the fixtures at all jobs to place them in the correct rooms.
Ord: 10   press tab (If the same fixture is sold multiple times, for multiple locations, be sure to enter the fixtures on separate lines.)
Ship: Enter the amount you are really shipping, if it is 0 then enter a 0 or leave blank
Price: Check to verify that the price is correct for what has been quoted to customer if applicable. The computer will not allow any price to be entered below contractor price on cash tickets. To go lower, you must first get authorization from your manager, then contact the office to have the price changed. *After a price is changed, you must reprint the ticket in order for the computer to recalculate the balance due.*   Continue entry of items until completed.

Type: 8   Either it will go to ticket print for account tickets or the payment screen for cash tickets.

When entering a stock item, if you have ordered more of a product than you can fill from stock, this option will appear:

Insufficient stock to cover order

Request from:

(S)pecific Branch -enter branch number to request product. Enter how many you wish to order-it will only allow you to request as many as you have sold on this particular ticket. When the transfer comes into your branch, it will have the ticket information printed on the transfer.

(B)uy-this will send a request to the purchasing department for the product to be ordered. When the ordered product comes in, it will be transferred to your store from the distribution department.

(N)o request-this will allow you to do nothing to cover the unavailable stock.

Example of how to enter a non-stock item on a ticket:

Type: 2   press tab

Part #:   Enter six digit vendor number of product and a five digit item number. (Ex. For a KICHLER 623457 you would enter 78392762345/NEVER enter as 00000) press tab

Desc: Enter   KH623457 and a valid description for the purchasing department to verify the correct product is being ordered. Press enter

Ord: enter the quantity to be ordered and a buy request will be sent.

Continue with ticket as detailed above. Make sure the price, cost, and unit of measure (e/c/m) of the item are entered and are correct.

Step 21:   **Payment/completion of cash ticket:**

Type: 8   Payment Type: **Please be sure to use the correct method of payment to ensure proper daily cash drawer balancing**. **DO NOT POST PAYMENT TO ANY TICKET IF YOU DO NOT HAVE PAYMENT IN HAND. ALWAYS RUN CREDIT CARD BEFORE POSTING PAYMENT INCASE CARD IS DECLINED**.

Cash

Check

CCard- Mastercard/Visa

Dscvr-Discover

Amex-American Express

Usecr- Use existing credit **(ONCE A CREDIT IS USED FOR PAYMENT, *IT CAN NOT BE CHANGED*. DOUBLE CHECK YOUR CREDIT NUMBER BEFORE POSTING!!!!!!)**

Pckup-Payment on pickup for will call tickets

Step 22:   **Correct y/n:** Check payment information**.**

Step 23:   *Print ticket*

ALL TICKETS MUST BE SIGNED BY THE CUSTOMER!!! NO EXCEPTIONS!!!!

SHIPPING CONFIRMATION

Shipping confirmation MUST be done on any ticket that was not done as an immediate ticket in ticket entry. It is to be done on cash and account tickets WHEN the product leaves Metro. It is NEVER acceptable to give a customer product without a shipper being done before the customer leaves. All product being shipped on a cash ticket must be paid in full for the computer to allow product shipment. On account tickets, this is a point in which the customer's available credit is checked so it is very important to verify that you as a salesman can release the product to them. By doing shipping confirmation, the computer is being told that the material on the ticket has left Metro property and is now with the customer.

Step 1:   Enter customer number and ticket number

Step 2:   Verify information is correct.
                        Correct y/n

Step 3:   The following option appear:
                        (L)ist- Listing of the shipping ticket

                        (C)hange- This option is used to make shipping quantity changes line by line on a shipping ticket. You may also change back order status on stock items from yes to no. This would be necessary if a back order is no longer needed. YOU CAN NOT CHANGE TO NO BACK ORDER ON ANY NON STOCK ITEM.
                                C then tab
                                Enter the line number you wish to make changes on then tab
                                Change quantity to how many you are shipping then tab
                                Change y to n if you wish to not back order something

                        (R)eview- This option pulls up every line item on the shipping ticket in sequential order. You can make the same changes described above to each line as it is brought up.

                        (S)hip- An entire ticket is can be changed to shipped status with this option or individual lines. To ship an entire ticket:
                                S then tab
                        After you ship everything on a ticket, you can go back and do a change on any line if you find you have made a mistake.

                        (T)otal-Total is used to complete the shipper or to make a payment on a back order ticket.   On account shippers, you will be taken to the printer option. On cash shippers, you will be taken to the same payment screen as ticket entry.
                                Payment Type: **Please be sure to use the correct method of payment to ensure proper daily cash drawer balancing. DO NOT POST PAYMENT TO ANY TICKET IF YOU DO NOT HAVE PAYMENT IN HAND. ALWAYS RUN CREDIT CARD BEFORE POSTING PAYMENT INCASE CARD IS DECLINED.**
                                Cash
                                Check
                                CCard- Mastercard/Visa

Dscvr-Discover
Amex-American Express
Usecr-Use existing credit **(ONCE A CREDIT IS USED FOR PAYMENT,** *IT CAN NOT BE CHANGED*. **DOUBLE CHECK YOUR CREDIT NUMBER BEFORE POSTING!!!!!!)**

Pckup-Payment on pickup for will call tickets

(E)xit- Use this if you have not completed your work on this shipper and you do not want to close out your shipper.

Note: Once a backorder ticket is created, it can not be edited in ticket entry.

ALL TICKETS MUST BE SIGNED BY THE CUSTOMER!!! NO EXCEPTIONS!!!!

CREDIT ENTRY

Step 1:   **Branch number:** The branch number you are located at will automatically come up on the screen. You may change it to a different branch number if desired. CREDITS SHOULD ALWAYS BE WRITTEN TO THE BRANCH IN WHICH THE PRODUCT IS RETURNED.

Step 2:   **Customer number:** Use the same customer number that the product was billed to.

Step 3:   **Credit number:** If you are entering a new credit, return through this field. If you are editing an existing credit, put your existing credit number in this field.

Step 4:   **Ship to**:
        Fill in the following for cash customers:
        Name (customer or company)
        Phone/Nextel number for contact
        Full address/city/state/zip code for customers that are being sent a check for their return.

        *Fill in the following for account customers***:**
        Name of person making return
        Job name/location

Step 5:   **Type of shipment:** Almost all credits will be warehouse returns. The only time a credit should be written as a direct ship would be if the product on a direct ship ticket was billed for but never received. If there are returns to us from a customer from a direct ticket and the product is brought back to one of our stores, the credit should be written as a warehouse return.

Step 6:   **Salesperson:** Enter the salesperson number who sold the product originally in this field. If you do not know that persons number (it will be on the original ticket number) enter your own number.

Step 7:   **Customer PO number:** Put the PO number from the original invoice when available. If your PO number is too long to fit in this field, type "see above" or "see below" and fill it in elsewhere on the header or the body of the credit. This field is very important for some customers. Please get in the habit of always asking if the customer needs a PO listed on the credit.

Step 8:   **State tax**:
        For cash customers- ALWAYS check to see if they were charged tax on the original ticket. If they were, you may continue on. If they were not, either clear the tax field or enter NT for no tax.
        For account customers- The account number determines whether or not a customer is charged tax depending on the paper work provided by them to our main office. If a customer claims to be tax exempt, they must call the credit department and discuss the necessary paperwork needed with them.

Step 9:   **Operator:** Enter your initials. Continue through the remaining options, to the continue y/n option. Verify all information and continue on.

Step 10:   **Body of the credit**: These are the different types of credits/options you can enter:
1S-*Stock item*   Any item listed in price file that is returned in original package, uninstalled and in sellable condition.

2S-*Non-stock item*   Any item that is not listed in price file that was ordered especially for this job in original package, uninstalled and in sellable condition. Keep in mind, *non stocks are NON RETURNABLE and should only be taken back in extreme situations.*
The person who takes back non stock product is responsible for obtaining an RGA. The manager of the store the non stock was returned to will then be contacted by Terri to verify that they are aware of the return and to verify that their employee is following through with the RGA request. They must send the non stock item with the RGA attached to MS (St Louis-electrical) attention Terri for it to be returned. DO NOT send it to Tim Artan. In some instances, the non stock item can be made stock if it is an item that could enhance or stock in a positive manner. This will be determined when the manager is contacted by Terri.

1B-*Defective stock return* Any item listed in price file that does not work (function), is tarnished, dented, dinged or otherwise damaged.

2B-*Non stock defective item* Any item that is not listed in price file that does not work (function), is tarnished, dented, dinged or otherwise damaged.

3-*Comment line*   Non product line to enter any special comments pertaining to an order. This option should also be used when doing a BUILDER display/spec discount. This only pertains to builders when their salesman has contracted discounts with them. See your manager before writing a discount on this line. If it is used, it should read as follows: lot number, subdivision name, percent of discount (on overage, allowance or whole ticket), and the ticket number. You may need to use more than one comment line to give all information. An example of how this line should read would be:
      LOT 24 Whereisit L12345-00
      10% ALLOWANCE
You can put multiple lots (discounts) on the same credit as long as they are listed separately. However, different branch credits should be written on separate credits.

4-*Special charge* Options for special non product charges. (Make sure to put a negative sign behind any amount you enter.)
      1-Labor
      2-Lamp repair
      4-Install labor
On options 1, 2, 4 please add a comment line explaining why the credit is being issued. Also, **ALWAYS** put a comment line with the ticket number that the customer was originally charged on.
      6-Gift certificate
      8-Allowance (only when told to use by the main office)
5-*Taxable special charge* This is for miscellaneous price adjustments etc.
      5-Price adjustment
            This is used when a customer is supposed to get a discount on a particular item on a ticket and was not, such as a customer was quoted $10.00 but was charged $15.00. Do not confuse this as an overpayment (see 8 overpayment for explanation). When doing a price adjustment, clear out the words price

adjustment that appear and enter the quantity of product, the item number and the ticket number.

Ex. 5- KH216WH   M12345-00

Press enter and type in the total of the price adjustment. If there are 5 items and the adjustment is for $5.00 per item, enter 25.00-. You can NEVER combine more then 1 type of product on any 1 price adjustment line. You also can NOT price adjust an entire ticket on one line. You must do it line by line.

6-Restock charge

This is used any time a customer returns an item and we are charging a restock charge. Enter the amount of the restock charge (DO NOT PUT A NEGATIVE SIGN BECAUSE WE ARE CHARGING THEM FOR THE RESTOCK, NOT CREDITING THEM)

8-Overpayment

The only time this is used is when a cash ticket is COMPLETE and we owe the customer money. On the final version of the ticket, there will be a NEGATIVE balance due if WE owe money. This exact amount with a negative sign behind it should be entered on the credit. THIS OPTION IS NEVER USED ON ACCOUNT TICKETS. IT IS ALSO NEVER USED TO PRICE ADJUST AN ITEM THAT WE HAVE OVERCHARGED A CUSTOMER ON. (Use the price adjustment option for them.)

7-*View total of sale*

T-*Tax credit*

Enter the subtotal of the product purchased on the original ticket followed by a negative sign.

This option is used to credit a tax amount. It may ONLY be used if a tax exemption certificate issued by the state is presented. If the customer does not have a copy of this certificate, they may fill out a form to exempt them from tax that is provided to us by the State of Missouri (see your manager for this form). Just having a tax ID number or a retail sales license is NOT sufficient paperwork for tax exemption.

8-*Payment/completion of cash credits*

 Payment Type: **Please be sure to use the correct method of refund to ensure proper daily cash drawer balancing**.

Cash

Send-Send check

CCard- Mastercard/Visa

Dscvr-Discover

Amex-American Express

Apply-Apply to a future ticket

For account tickets, by typing 8 to complete ticket, you will be taken to print option. WHEN USING A CREDIT BE SURE TO LEAVE THE NEGATIVE SIGN IN THE AMOUNT. IF YOU CHANGE THE AMOUNT OF CREDIT YOU ARE USING, A NEGATIVE SIGN MUST BE IN THERE IN ORDER FOR THE CREDIT TO POST CORRECTLY.

9-*Freight charge* Always put a comment line on the credit with the original ticket number that the freight was charged on. Also, on a comment line, please explain why the freight is being credited.

L-*List items entered on order*

S-*Catalog search*
D-*Delete line*
?-*List of options available*

Example of how to enter a stock item on a credit:

Type: **1S** tab
Part #: /PS1594W enter/tab
Customer#: Enter the customer number the sale was made on – EX. 73699 or 63
Ticket #: Enter the ticket number the sale was made on – EX. S12345-00. **YOU MUST FILL IN THE TICKET NUMBER ON ALL CASH CREDITS**. If you have the ticket number for account returns, please fill it in but it is not required.
Order: Enter the quantity being returned with a negative behind it.
Ship : This field will automatically fill itself in.
>   Note: These two fields will not allow you to credit more of an item than was purchased on the ticket number that has been given**.**

Return reason:
>   "D" Wrong Color
>   "E" Do Not Like It
>   "F" Do Not Need
>   "G" Other

The remaining options are for defective returns. Do not use them for non defective stock returns. If a ticket number has been given, the credit will automatically pull the sell price from the original invoice. This does NOT take into consideration any lump some discounts given on the original ticket.

Example of how to enter a non stock item on a credit:

NON STOCK ITEMS ARE NON RETURNABLE. THEY SHOULD BE TAKEN BACK ONLY IN EXTREME SITUATIONS. IF WE DO TAKE A NON STOCK BACK, IT IS SUBJECT TO A 25% RESTOCK FEE. THE SALESPERSON TAKING BACK THE NON STOCK ITEM IS RESPONSIBLE FOR GETTING ANY RGA'S REQUIRED TO SEND THE MATERIAL BACK TO THE FACTORY. BEFORE THE CREDIT IS REFUNDED, THE SALESPERSON MUST FIND OUT WHAT THE RESTOCK CHARGE IS FROM THE FACTORY TO VERIFY THAT 25% WILL COVER OUR EXPENSE.

Type: **2S** tab
Part # : Enter the product code number given on the original ticket. EX. 78500715941. If you did not enter a product code number on the original ticket, the computer makes it 11 zeros.
Customer # : Enter the customer number the sale was made on – EX. 73699 or 63
Ticket #: Enter the ticket number the sale was made on – EX. S12345-00. **YOU MUST FILL IN THE TICKET NUMBER ON ALL CASH CREDITS**. If you have the ticket number for account returns, please fill it in but it is not required.
Description: The credit will automatically pull up the description from the original ticket. If you/the computer used all zeros for the part number and if there are no other non stocks on the original ticket, the computer will pull up the correct description. If there is more than one non stock item on the ticket and you/the computer issued all zeros for the part

numbers, it may not pull up the correct description. Please be sure that you have the correct description filled in.

Order: Enter the quantity being returned with a negative behind it.

Ship : This field will automatically fill itself in.

Return reason:

      "D" Wrong Color

      "E" Do Not Like It

      "F" Do Not Need

      "G" Other

The remaining options are for defective returns. Do not use them for non defective non stock returns. If a ticket number has been given, the credit will automatically pull the sell price from the original invoice. This does NOT take into consideration any lump some discounts given on the original ticket.

Example of how to enter a DEFECTIVE stock item on a credit:

Type: **1B** tab

Part #: /PS1594W enter/tab

Customer#: Enter the customer number the sale was made on – EX. 73699 or 63

Ticket #: Enter the ticket number the sale was made on – EX. S12345-00. **YOU MUST FILL IN THE TICKET NUMBER ON ALL CASH CREDITS**. If you have the ticket number for account returns, please fill it in but it is not required.

Order: Enter the quantity being returned with a negative behind it.

Ship : This field will automatically fill itself in.

      Note: These two fields will not allow you to credit more of an item than was purchased on the ticket number that has been given**.**

Return reason:

      "A" Broken

      "B" Defective

      "C" Missing parts

The remaining options are for GOOD returns. Do not use them for defective stock returns. If a ticket number has been given, the credit will automatically pull the sell price from the original invoice.

Example of how to enter a DEFECTIVE non stock item on a credit:

Type: **2B** tab

Part # : Enter the product code number given on the original ticket. EX. 78500715941. If you did not enter a product code number on the original ticket, the computer makes it 11 zeros.

Customer # : Enter the customer number the sale was made on – EX. 73699 or 63

Ticket #: Enter the ticket number the sale was made on – EX. S12345-00. **YOU MUST FILL IN THE TICKET NUMBER ON ALL CASH CREDITS**. If you have the ticket number for account returns, please fill it in but it is not required.

Description: The credit will automatically pull up the description from the original ticket. If you/the computer used all zeros for the part number and if there are no other non stocks on the original ticket, the computer will pull up the correct description. If there is more than one non stock item on the ticket and you/the computer issued all zeros for the part numbers, it may not pull up the correct description. Please be sure that you have the correct description filled in.

Order: Enter the quantity being returned with a negative behind it.

Ship : This field will automatically fill itself in.

Return reason:

      "A" Broken

      "B" Defective

      "C" Missing parts

The remaining options are for GOOD returns. Do not use them for defective non stock returns. If a ticket number has been given, the credit will automatically pull the sell price from the original invoice.

UPDATE WILL CALL

By doing will call update, the computer is being told that any product that is being updated is physically pulled from warehouse stock and is being put in a will call for a customer to pick up. This is a very important step because it adjusts stock status (which shows our stock levels) to show what is available to sell from our warehouse stock.

Step 1: **For all branches except 5,8,16. See below for these branches.**
1-Will Call Whole Ticket
2-Will Call Whole Ticket W/Exceptions
3-Will Call Specific Ticket Lines

Step 2A: **Will Call Whole Ticket-** This option is used if you have ALL of the product for a ticket.
Enter ticket number
Enter will call by (your initials)
Continue with update y/n
Once you have entered this information, your ticket will call is complete.

Step2B: **Will Call Whole Ticket W/Exceptions**- This option can be useful if you have a large ticket and most items are to be will called but not all.
Enter ticket number
Enter will call by (your initials)
Enter the line numbers that you DO NOT want to will call
Continue with update y/n
Once you have entered this information, all of the items are now will called except the ones you have identified as exceptions.

Step 2C: **Will Call Specific Ticket Lines**- This option updates will call by individual line items.
Enter ticket number
Enter line number
Enter quantity being will called. A display of what is previously will called will come up. You can not will call more items than are ordered on the ticket. If you want to remove something from will call, enter the quantity you want to remove and the negative sign.
Enter your initials
Continue through this process until all lines needing will call update are done.

*Step 1: **For branches 5,8,16**
1-Auto Update
2-Manual Update (This option takes you to step 1 above.)

*Step 2: **Auto Update**- This option was designed for the higher volume stores to assist in the paper work process.
Enter transfer number or purchase order receiver number. This will then pull up the line item from your ticket that the transfer/po is tied to.
Enter quantity being will called
Enter the location of the will call
Enter will called by (your initials)

All will call information entered appears in ticket inquiry (ticket search).

CANCELLATION OF SPECIAL ORDER ITEMS

Non stock items are NON RETURNABLE and should only be taken back in extreme situations.

Electrical and Lighting

Non stock item has been ordered but not yet shipped from factory:
1) The salesperson needs to call and cancel item with the factory/rep.
2) Contact purchasing department by phone/email and have them delete it from the purchase order.
3) Contact the billing department by phone/email and have them delete the item from the ticket.

Non stock item has been received by Metro and has not yet been delivered to the customer:
1) Call factory/rep and request an RGA. If the item is a product that will positively enhance Metro's inventory, contact Terri at St Louis and it will be made a stock item at this time.
2) Call Terri at St Louis and let her know the ticket number and the item that is going back to the factory. Keep product in safe place so when the RGA arrives it can be located with ease.
3) Send the RGA, ticket and the product being returned to Terri at St Louis for return to the factory. LIGHTING- DO NOT SEND NONSTOCK RGA'S TO TIM ARTAN.
4) Be sure to charge a restock charge to the customer that will cover ALL expenses Metro will incur returning the product to the factory.

Non stock item has been sold/billed to customer and is being returned:
1) Write a credit. (See chapter on credits for proper procedure.) Be sure to charge a restock charge that will cover ALL expenses Metro will incur returning the product to the factory.
2) The person taking back the product is responsible for obtaining an RGA from the factory/rep. If the item is a product that will positively enhance Metro's inventory, contact Terri at St Louis and it will be made a stock item at this time.
3) The manager of the store the non stock was returned to will then be contacted by Terri to verify that they are aware of the return and to verify that their employee is following through with the RGA request.
4) Keep product in safe place so when the RGA arrives it can be located with ease.
5) Send the RGA, and the product being returned to Terri at St Louis for return to the factory. LIGHTING- DO NOT SEND NON STOCK RGA'S TO TIM ARTAN.

QUOTES
Standard Electrical Quote Entry:

Step 1: Enter branch number, customer number and return through quote number when starting a new quote. If an existing quote is being edited, enter the quote number.

Step 2: Enter the job name, PO number or any other pertinent information in the ship to column. Keep in mind that anything entered in the job name field on the first line, can be researched in quote inquiry.

Step 3: Enter the following information:
Salesperson number
(W)arehouse or (D)irect shipment
Date - Need not be changed
Margin - If a percentage is entered in the margin, that margin will automatically carry through on the entire quote. It is changeable on the individual line items.
Tie Lamps – This is for lighting use only.
Standing Quote – A standing quote is a quote that will be kept for future use (Y). A non standing quote is a one time quote that does not need to be kept (N).
Tax Code – Need not be changed.

Step 4: Correct: (Y/N/C/D)
Y-Yes
This allows you to continue with quote.
N- No
This allows changes to be made to (A)ll (the entire header), (C)ustomer, (S)hip (the shipping information), (R)ibbon (the line with the salesman number etc.)
C- Copy
Duplicate a quote
D- Delete
Standing quotes can not be deleted. If a standing quote needs to be deleted, it must be changed to a non standing quote first.

Step 5: Body of the quote:
TYPE OF SALE (1-stock, 2-non-stock, 3 comment line, 4-labor etc, discount- by amount or percentage, 7-subtotal, 8- print, 9- freight)
C – Change a line. Anything on that line (number, cost, margin etc.) can be changed.
D – Delete line
I – Insert a line between existing lines.
L – List the existing lines.
R – Renumber lines. (If lines have been deleted, the lines can be renumbered so that they are consecutive.)
S – Search a number
X – Delete quote
GO – Generate order

PART NUMBER (If the item is non stock, enter six digit vendor number of product and a five digit item number in this field. ex. for a P&S9236 you would enter 78500792369) press enter then enter your description.

POST - For showroom use.

R/T – Room/Type of fixture.

SB – Special buy (Y/N)

DSC – Discontinued item being quoted.

QTY – Quantity of fixture.

COST – Cost will automatically appear. If a there is a special cost given from the vendor, this is the opportunity to incorporate it in the quote. *ANY SPECIAL COSTS ENTERED HERE, MUST BE RELAYED TO THE PURCHASING AGENT SO IT CAN BE ENTERED ON THE PRUCHASE ORDER.*

MARGIN – Put the margin percent in this field. (ex. 10.0 would be a 10% margin). Leave this field blank if the quote is being done by percentage.

UM – Unit of measure (E/C/M)

PRICE – This field can be changed if the product has a specific price being quoted as apposed to quoting by margin or percent.

T/D – Put the percentage being added to cost if the item is quoted a specific percent over cost. (ex. 10.0 would be 10% over cost). Leave this field blank if the quote is being done by margin or specific price.

EXT – This displays the extended price which is the total for this line item.

Step 6: Print (8 in the type)
Select printer number (You may email a copy of this quote from here. See chapter on emailing tickets and quotes.)
Substitute NAED number for description Y/N

Quote Generation:

Step 1: Enter quote number
Generate order Y/N

Step 2: Select (I)mmediate, (W)ill Call, (D)elivery
Check all pertinent information in the header.
Enter your initials.
Correct (Y)es, (N)o (gives you the option to change the header again) (E)xit (this exits the generation of this quote)
If (Y) the first line of the quote will come up to be checked. If there is insufficient stock available, the option is given to request (S)pecific branch, (B)uy, or (N)o request
The quote will go line by line to generate each item.
Save Quotation (Y/N) will appear. If the quote is correct, enter yes. The quote now is a ticket. The computer will go to the ticket entry screen. Additional items can be added to the ticket at this time. If no, the computer will exit the quote (which is now a ticket), however, the items will remain on the new ticket to be changed or added to at a later date. Complete ticket process as usual.

Deleting /Copying a quote:

To **delete** a saved quote, return to quote entry.
Enter branch number, customer number, quote number.
Enter a (D) to delete.

To **copy** a saved quote, return to quote entry.
Enter branch number, customer number, quote number.
Enter (C) to copy.
Copy this quotation to a new number?   Y
Change customer number?   Y/N
Change branch number?   Y/N
The program will generate a new quote number and place you at the beginning of entry for that quote.

Standard Lighting Quote Entry:

Step 1: Enter branch number, customer number and return through quote number when starting a new quote. If an existing quote is being edited, enter the quote number.

Step 2: Quote type (D)isplay, (S)pec, (L)ighting, (W)hole house. (Whole house should be done as cash customer only.)

Step 3: Enter the job name, PO number or any other pertinent information in the ship to column. Keep in mind that what ever is entered in the job field on the first line is a search field in quote inquiry.

Step 4: Enter the following information:
Salesperson number
(W)arehouse or (D)irect shipment
Date - Need not be changed
Margin - If a percentage is entered in the margin, that margin will automatically carry through on the entire quote. It is changeable on the individual line items.
Tie Lamps – This is for lighting use only.
Standing Quote – A standing quote is a quote that will be kept for future use (Y). A non standing quote is a one time quote that does not need to be kept (N).
Tax Code – Need not be changed.

Step 5: Correct: (Y/N/C/D)
Y-Yes
  This allows you to continue with quote.
N- No
  This allows changes to be made to (A)ll (the entire header), (C)ustomer, (S)hip (the shipping information), (R)ibbon (the line with the salesman number etc.)
C- Copy
  Duplicate a quote
D- Delete
  Standing quotes can not be deleted. If a standing quote needs to be deleted, it must be changed to a non standing quote first.

Step 6: Body of the quote:
TYPE OF SALE (1-stock, 2-non-stock, 3 comment line, 4-labor etc, discount- by amount or percentage, 7-subtotal, 8- print, 9- freight)
  C – Change a line. Anything on that line (number, cost, margin etc.) can be changed.
  D – Delete line
  I – Insert a line between existing lines.
  L – List the existing lines.
  R – Renumber lines. (If lines have been deleted, the lines can be renumbered so that they are consecutive.)
  S – Search a number
  X – Delete quote
  GO – Generate order

PART NUMBER (If the item is non stock, enter six digit vendor number of product and a five digit item number in this field. ex. for a KH9236 you would enter 78392792369) press enter then enter your description.

POST - (Put on separate ticket) Split ticket feature that allows the several shipments from the original ticket number.

R – This indicates the rough in shipment. Using this R, when the ticket is generated and the split is updated through ticket entry will give you an additional ticket with a -50 on the ticket number. Ex. M12345-00 will also give you M12345-50 for the rough in shipment to be made.

1 – This indicates a first post shipment, such as bulbs that need to be given to the customer separate from the initial delivery of fixtures. Using a 1, when the ticket is generated and the split is updated through ticket entry will give you an additional ticket with a -60 on the ticket number. Ex. M12345-00 will also give you M12345-60 for the 1st post shipment to be made.

2 – This indicates a second post shipment, such as fans that need to be given to the customer separate from the initial delivery of fixtures. Using a 2, when the ticket is generated and the split is updated through ticket entry will give you an additional ticket with a -70 on the ticket number. Ex. M12345-00 will also give you M12345-70 for the 2nd post shipment to be made.

R/T – Room/Type of fixture.

SB – Special buy (Y/N)

DSC – Discontinued item being quoted.

QTY – Quantity of fixture.

COST – Cost will automatically appear. If a there is a special cost given from the vendor, this is the opportunity to incorporate it in the quote. *ANY SPECIAL COSTS ENTERED HERE, MUST BE RELAYED TO THE PURCHASING AGENT SO IT CAN BE ENTERED ON THE PRUCHASE ORDER.*

MARGIN – Put the margin percent in this field. (ex. 10.0 would be a 10% margin). Leave this field blank if the quote is being done by percentage.

UM – Unit of measure (E/C/M)

PRICE – This field can be changed if the product has a specific price being quoted as apposed to quoting by margin or percent.

T/D – Put the percentage being added to cost if the item is quoted a specific percent over cost. (ex. 10.0 would be 10% over cost). Leave this field blank if the quote is being done by margin or specific price.

EXT – This displays the extended price which is the total for this line item.

Step 7: Print (8 in the type)

Select printer number (You may email a copy of this quote from here. See chapter on emailing tickets and quotes.)

Substitute NAED number for description Y/N

Quote Generation:

Step 1: Enter quote number
Generate order Y/N

Step 2: Select (I)mmediate, (W)ill Call, (D)elivery
When generating lines, stop only if item not available (Y/N).
> If NO, the quote will stop and allow a transfer request or purchase to be made for every item on the ticket.
> If YES, the quote will generate all items available at your store and only stop line by line if the product is not available at your store.

Split this quote into multiple tickets (Y/N).
Check all pertinent information in the header.
Enter your initials.
Correct (Y)es, (N)o (gives you the option to change the header again) (E)xit (this exits the generation of this quote)
If (Y) the first line of the quote will come up to be checked. If there is insufficient stock available, the option is given to request (S)pecific branch, (B)uy, or (N)o request
The quote will go line by line to generate each item.
Save Quotation (Y/N) will appear. If the quote is correct, enter yes. The quote now is a ticket. The computer will go to the ticket entry screen. Additional items can be added to the ticket at this time. If no, the computer will exit the quote (which is now a ticket), however, the items will remain on the new ticket to be changed or added to at a later date. Complete ticket process as usual.

Deleting /Copying a quote:

To delete a saved quote, return to quote entry.
Enter branch number, customer number, quote number.
Enter a (D) to delete.

To copy a saved quote, return to quote entry.
Enter branch number, customer number, quote number.
Enter (C) to copy.
Copy this quotation to a new number?   Y
Change customer number?   Y/N
Change branch number?   Y/N
The program will generate a new quote number and place you at the beginning of entry for that quote.

Whole House Quote Entry:

Step 1: Enter branch number, customer number (this should ALWAYS be a cash number on a whole house, not an Account number) and return through quote number when starting a new quote. If an existing quote is being edited, enter the quote number.

Step 2: Enter builder number (A question mark here will take the program to customer search.) The customer name will automatically be filled in.
Enter the allowance amount.
Enter the closing date.

Step 3: Enter the job name, PO number or any other pertinent information in the ship to column. Keep in mind that what ever is entered in the job field on the first line is a search field in quote inquiry.

Step 4: Enter the following information:
Salesperson number
(W)arehouse or (D)irect shipment
Date - Need not be changed
Margin – Not applicable on whole house tickets.
Tie Lamps – This is for lighting use only.
Standing Quote – A standing quote is a quote that will be kept for future use (Y).
A non standing quote is a one time quote that does not need to be kept (N).
Tax Code – Need not be changed.

Step 5: Enter owner information. (name, phone number, subdivision, lot, unit, model)

Step 6: Correct: (Y/N/C/D)
Y-Yes
This allows you to continue with quote.
N- No
This allows changes to be made to (A)ll (the entire header), (C)ustomer, (S)hip (the shipping information), (R)ibbon (the line with the salesman number etc.)
C- Copy
Duplicate a quote
D- Delete
Standing quotes can not be deleted. If a standing quote needs to be deleted, it must be changed to a non standing quote first.

Step 7: Body of the quote:
TYPE OF SALE (1-stock, 2-non-stock, 3 -comment line, 4-labor etc, 5-discount/ by amount or percentage, 7-subtotal, 8- print, 9- freight)
C – Change a line. Anything on that line (number, cost, margin etc.) can be changed.
D – Delete line
I – Insert a line between existing lines.
L – List the existing lines.

R – Renumber lines. (If lines have been deleted, the lines can be renumbered so that they are consecutive.)
S – Search a number
X – Delete quote
GO – Generate order
PART NUMBER (If the item is non stock, enter six digit vendor number of product and a five digit item number in this field. ex. for a KH9236 you would enter 78392792369) press enter then enter your description.
POST - Put on separate ticket – Split ticket feature that is not active at this time.
R/T – Room/Type of fixture.
DSC – Discontinued item being quoted.
QTY – Quantity of fixture.
PRICE – Builders price will display automatically. Whole house quote entry will not allow you to quote below builders price.
UM – Unit of measure (E/C/M)
T/D – Not applicable.
EXT – This displays the extended price which is the total for this line item.

Step 8: Print (8 in the type)
Select printer number (You may email a copy of this quote from here. See chapter on emailing tickets and quotes.)
Substitute NAED number for description Y/N

Quote Generation:

Step 1: Enter quote number
Generate order Y/N

Step 2: When generating lines, stop only if item not available (Y/N).
If NO, the quote will stop and allow a transfer request or purchase to be made for every item on the ticket.
If YES, the quote will generate all items available at your store and only stop line by line if the product is not available at your store.
Split this quote into multiple tickets (Y/N).
Check all pertinent information in the header.
Enter your initials.
Enter DATE WANTED (This date should be 4 weeks prior to closing date.)
Correct (Y)es, (N)o (gives you the option to change the header again) (E)xit (this exits the generation of this quote)
If (Y) the first line of the quote will come up to be checked. If there is insufficient stock available, the option is given to request (S)pecific branch, (B)uy, or (N)o request
The quote will go line by line to generate each item.
Save Quotation (Y/N) will appear. If the quote is correct, enter yes. The quote now is a ticket. The computer will go to the ticket entry screen. Additional items can be added to the ticket at this time. If no, the computer will exit the quote (which is now a ticket), however, the items will remain on the new ticket to be changed or added to at a later date. Complete ticket process as usual.

Deleting /Copying a quote:

To delete a saved quote, return to quote entry.
Enter branch number, customer number, quote number.
Enter a (D) to delete.

To copy a saved quote, return to quote entry.
Enter branch number, customer number, quote number.
Enter (C) to copy.
Copy this quotation to a new number?   Y
Change customer number?   Y/N
Change branch number?   Y/N
The program will generate a new quote number and place you at the beginning of entry for that quote.

TICKET INQUIRY/SEARCH

Ticket inquiry can be a very valuable tool. There are many different ways to search for a wide variety of information. You can search by:

Ticket number

Customer number

> For builders, this will not bring up whole house tickets, only tickets written under their account number.

Customer and PO number

> The PO can be entered exactly as it was on the ticket, or you can enter the beginning of the po number and all po's with that beginning sequence will be listed.

Builder number

> This will only bring up whole house tickets, not tickets written to a builders account.

Builder and Subdivision

> The subdivision will only search for what is exactly on the ticket. If you have a subdivision such as New Town, it's probably best to just enter New as your subdivision name and anything that has New at the beginning of it will come up.

Builder, Subdivision and Lot

Builder and Lot

Salesperson number

Branch number

Vendor number

> You may search through an entire vendor if you know that a specific item was purchased from that vendor, however, you're not sure what the item was. <u>If a non stock item was entered on a ticket, put the letter N in vendor</u>. This will show all non stock items on any ticket. You may narrow the search by entering information in any of the other fields. You can also enter a partial description in the item field to narrow things down (ex. KH12 or just KH). Keep in mind that it will only bring the item up as it was entered on the ticket, (i.e. if you entered a / * or any other character in front of the item you must enter this first). If you are not sure how the non stock was entered, you can enter a customer number and/or salesman number etc and put an N in vendor and let it bring up all non stocks to be viewed.

Item

Type of ticket

> You can search for a specific type of ticket along with any of the options previously stated such as: *All Tickets* (this would include billed, shipped, back orders or open tickets), *Open orders* (this will show ONLY open tickets that have not yet been billed including those that have been shipped but are not billed.), *Back order tickets* (this will show ONLY back order tickets), *History tickets* (this will show ONLY tickets that are completely billed)

Specific date ranges

You may combine any variation of options above to narrow your search.

EX. You know that Judy wrote a whole house ticket for Whittaker, Lot 63 in July at O'Fallon and it has some Kichler product on it but you're not sure of specific items. You would enter the information as on example 1. The search would then show every ticket within the parameters of the given information.

EXAMPLE 1:

TICKET INQUIRY

TICKET #: ?   -00

CUSTOMER: CUSTPO:

BUILDER: **97174**   SUBDIV: LOT #: **63**

SLSPRSN: **210**

BRANCH..:

VENDOR..: **783927**   ITEM:

(A)LL TICKETS, (O)PEN ORDERS, (B)ACK ORDERS OR (H)ISTORY A

ORDER DATES---FROM: **070106**   TO: **080106**

WANT DATES----FROM: TO:

INVOICE DATES-FROM: TO:

Once you have found the ticket you want to look at, this is what your screen will look like:

EXAMPLE 2	Whole House
EXAMPLE 3	Cash
EXAMPLE 4	Account

Example 2: Using W67502-00 as the example of how a whole house displays:

Line 1 Branch number, customer number, ticket number, how many versions of the ticket have been printed, whether the ticket is *open*(any stage previous to billing)/*billed*(any ticket that was totally completed through the billing process on the day you are looking at it)/*history*(any ticket completed through the billing process previously). The final section reports the shipping status of the ticket (pick ticket printed, shipped etc.)

Line 2 SHPD FRM is the branch number that the inventory is being shipped from. Then it identifies the ticket as a whole house. If the ticket was generated from a quote, it will then identify that information. The final information on this line is whether or not the ticket is a direct or warehouse shipment.

Line 3,4,5,6 The first section shows branch information and the second section shows any customer information you have entered on the ticket.

Line 7 SLSP is the primary (outside salesperson) and secondary (inside salesperson) salesperson on the ticket. EBY is the initials of who entered the ticket. CBY and PBY are not currently in use. SBY is the initials of the person printing the shipper. ORDR is the date the ticket is written. WANT is the approximate date that the product will be wanted for delivery (this date should be about four weeks prior to the closing date of the home). CHGD is not currently is use.

Line 8 CLOSE is the approximate closing date of the home. DLVR is the date that the order is scheduled for delivery by the shipping department. SHPD is the date the shipper is printed on. INVD is the date the ticket is auto confirmed or the billing department bills the ticket in the computer.

Line 9 B/O is whether the ticket will allow back orders or not. EXT TKT is the setting showing if the prices are to be extended on the hard copy of the ticket. SHIP VIA is the location for an entry if a specific type of shipment is necessary, such as UPS, our truck, freight line etc. CPO is where the customer's purchase order number appears.

Line 10 TAX CDS, CPR, CDC, BE are tax code and pricing information. RCVD BY is not currently in use but will eventually be the name of the person who received the material. CPY if for office use.

Line 11,12,13,14,15 These lines are the builder, customer, subdivision information entered on the ticket.

Line 17 Located is the information that was entered on the ticket to assist in communication with the shipping department about the approximate location of the subdivision or job.

Line 18 This section lists the various charges on the ticket. SUB-TOT, TXBL SC (any special discounts that were given on the ticket), TAX, FREIGHT, SPL CHG (this includes labor, rewires etc), the TOTAL is then shown. PYMNT is the **total** of any payments made to this ticket by the customer including credits/cash/credit card etc. ALLOW is the amount of the allowance the builder will be billed, for this ticket.

Line 19 (D)ETAIL takes you into the body of the ticket to allow the items to be viewed.
(N)EXT will display the next consecutive ticket written for this customer.
PRE(V)IOUS will display the last consecutive ticket written for this customer.
(S)EARCH goes back to start a new inquiry.
EN(T)RY will take the ticket being viewed into the ticket entry program as long as the ticket is not shipped or billed already.
(E)ND will take the screen back to the main menu.

IF YOU ENTER A **P** AT THIS POINT YOU WILL BE TAKEN TO A SCREEN THAT SHOWS ALL CASH CUSTOMER PAYMENTS ON THE TICKET BEING VIEWED. THE DATE, MANOR OF PAYMENT, AMOUNT OF EACH PAYMENT AND THE DAILY CASH DRAWER BALANCING REGISTER NUMBER ARE ALL LISTED.

Example 2:

1)BRANCH #: **9** CUSTOMER #: **93** TICKET #:**W67502-00** VER: **2 OPEN** (SHIPPER PRINTED)
2)SHPD FRM: **5** WHOLE HOUSE FROM QUOTE WAREHOUSE

3)B WEST COUNTY SHOWROOM S **LEVINSON 48 TOWNES**
4)I ACCT # 93 H **YALLALY 314.799.5359**
5)I 15004 MANCHESTER RD I
6)L BALLWIN, MO 63011 P

7)SLSP: **1:403** EBY: **JW** CBY: PBY: SBY: **SS** ORDR: **05/19/06** WANT: **06/15/06** CHGD:
8) CLOSE: **06/15/06** DLVR: **08/30/06** SHPD: **08/29/06** INVD:
9)B/O: Y EXT TKT: Y SHIP VIA: CPO:
10)TAX CDS: 9 CPR: 2 CDC: 0 BE: .0 RCVD BY: CPY: 0

18)
11)BUILDER: **54501 LEVINSON DEV. CO**. SUB-TOT: 2292.70
12)O **JOAN YALLALY** PH: **314.799.5359** TXBL SC: .00
13)W TAX: 162.21
14)N FREIGHT: .00
15)R **TOWNES @ HILLTOP** LOT: **48** SPL CHG: .00
16)MDL/PLN: **GEORGIAN** UNIT: ---------
17)LOCATED: 2454.91
  PYMNT: .00
  ALLOW: 2454.91

19) (D)ETAIL, (N)EXT, PRE(V)IOUS, (S)EARCH, EN(T)RY OR (E)ND

Example 3: Using W69521-00 as the example of how a cash ticket displays:

Line 1 Branch number, customer number, ticket number, how many versions of the ticket have been printed, whether the ticket is *open*(any stage previous to billing)/*billed*(any ticket that was totally completed through the billing process on the day you are looking at it)/*history*(any ticket completed through the billing process previously). The final section reports the shipping status of the ticket (pick ticket printed, shipped etc.)

Line 2 SHPD FRM is the branch number that the inventory is being shipped from. Then it identifies the ticket as a cash ticket. If the ticket was generated from a quote, it will then identify that information. The final information on this line is whether or not the ticket is a direct or warehouse shipment.

Line 3,4,5,6 The first section shows customer information and the second section shows any additional customer information that was entered on the ticket.

Line 7 SLSP is the primary (outside salesperson) and secondary (inside salesperson) salesperson on the ticket. EBY is the initials of who entered the ticket. CBY and PBY are not currently in use. SBY is the initials of the person printing the shipper. ORDR is the date the ticket is written. WANT will be the date that the ticket is written unless specified differently during ticket entry. CHGD is not currently is use.

Line 8 DLVR is the date that the order is scheduled for delivery if being shipped from the central warehouse. SHPD is the date the shipper is printed on. INVD is the date the ticket is auto confirmed or the billing department bills the ticket in the computer.

Line 9 B/O is whether the ticket will allow back orders or not. EXT TKT is the setting showing if the prices are to be extended on the hard copy of the ticket. SHIP VIA is the location for an entry if a specific type of shipment is necessary, such as UPS, our truck, freight line etc. CPO is where the customer's purchase order number appears.

Line 10 TAX CDS, CPR, CDC, BE are tax code and pricing information. RCVD BY is not currently in use but will eventually be the name of the person who received the material. CPY if for office use.

Line 11 This section lists the various charges on the ticket. SUB-TOT, TXBL SC (any special discounts that were given on the ticket), TAX, FREIGHT, SPL CHG (this includes labor, rewires etc), the TOTAL is then shown. PYMNT is the **total** of any payments made to this ticket by the customer including credits/cash/credit card etc.

Line 12 **(**D)ETAIL takes you into the body of the ticket to allow the items to be viewed.
    (N)EXT will display the next consecutive ticket written for this customer.
    PRE(V)IOUS will display the last consecutive ticket written for this customer.
    (S)EARCH goes back to start a new inquiry.
    EN(T)RY will take the ticket being viewed into the ticket entry program as long as the ticket is not shipped or billed already.
    (E)ND will take the screen back to the main menu.

IF YOU ENTER A **P** AT THIS POINT YOU WILL BE TAKEN TO A SCREEN THAT SHOWS ALL CASH CUSTOMER PAYMENTS ON THE TICKET BEING VIEWED. THE DATE, MANOR OF PAYMENT, AMOUNT OF EACH PAYMENT AND THE DAILY CASH DRAWER BALANCING REGISTER NUMBER ARE ALL LISTED.

Example 3:

1)BRANCH #: **9** CUSTOMER #: **93**TICKET #:**W69521-00** VER: **3 OPEN** (SHIPPER PRINTED)

2)SHPD FRM: **9**   CASH SALE   WAREHOUSE

3)B **TAMMIE PUTNEY**   S **TAMMIE PUTNEY**

4)I **972-841-8944**   H

5)I   I

6)L   P

7)SLSP: **1:395** EBY: **DW** CBY: PBY: SBY:**LIZ** ORDR:**09/07/06** WANT:**09/07/06** CHGD:

8)   DLVR: SHPD: **09/07/06** INVD:

9)B/O:Y EXT TKT:Y SHIP VIA:**WILL CALL** CPO:

10)TAX CDS:9   CPR:2 CDC:0 BE: .0   RCVD BY: CPY:0

11)
SUB-TOT:	99.50
TXBL SC:	.00
TAX:	7.04
FREIGHT:	.00
SPL CHG:	.00

	106.54
PYMNT:	254.77

12) (D)ETAIL, (N)EXT, PRE(V)IOUS, (S)EARCH, EN(T)RY OR (E)ND

Example 4: Using S84605-00 as the example of how an account ticket displays:

Line 1 Branch number, customer number, ticket number, how many versions of the ticket have been printed, whether the ticket is *open*(any stage previous to billing)/*billed*(any ticket that was totally completed through the billing process on the day you are looking at it)/*history*(any ticket completed through the billing process previously). The final section reports the shipping status of the ticket (pick ticket printed, shipped etc.)

Line 2 SHPD FRM is the branch number that the inventory is being shipped from. Then it identifies the ticket as a charge/spec/display ticket. If the ticket was generated from a quote, it will then identify that information. The final information on this line is whether or not the ticket is a direct or warehouse shipment.

Line 3,4,5,6 The first section shows account information and the second section shows any additional customer information that was entered on the ticket.

Line 7 SLSP is the primary (outside salesperson) and secondary (inside salesperson) salesperson on the ticket. EBY is the initials of who entered the ticket. CBY and PBY are not currently in use. SBY is the initials of the person printing the shipper. ORDR is the date the ticket is written. WANT will be the date that the ticket is written unless specified differently during ticket entry. CHGD is not currently is use.

Line 8 DLVR is the date that the order is scheduled for delivery if being shipped from the central warehouse. SHPD is the date the shipper is printed on. INVD is the date the ticket is auto confirmed or the billing department bills the ticket in the computer.

Line 9 B/O is whether the ticket will allow back orders or not. EXT TKT is the setting showing if the prices are to be extended on the hard copy of the ticket. SHIP VIA is the location for an entry if a specific type of shipment is necessary, such as UPS, our truck, freight line etc. CPO is where the customer's purchase order number appears.

Line 10 TAX CDS, CPR, CDC, BE are tax code and pricing information. RCVD BY is not currently in use but will eventually be the name of the person who received the material. CPY if for office use.

Line 11 This section lists the various charges on the ticket. SUB-TOT, TXBL SC (any special discounts that were given on the ticket), TAX, FREIGHT, SPL CHG (this includes labor, rewires etc), the TOTAL is then shown.

Line 12 (D)ETAIL takes you into the body of the ticket to allow the items to be viewed.
> (N)EXT will display the next consecutive ticket written for this customer.
> PRE(V)IOUS will display the last consecutive ticket written for this customer.
> (S)EARCH goes back to start a new inquiry.
> EN(T)RY will take the ticket being viewed into the ticket entry program as long as the ticket is not shipped or billed already.
> (E)ND will take the screen back to the main menu

Example 4:

1)BRANCH #:**1** CUSTOMER #:**74950** TICKET #:**S84605-00** VER:**2 OPEN** (SHIPPER PRINTED)

2)SHPD FRM: 1   CHARGE SALE   FROM QUOTE   WAREHOUSE

3)B ROC CONSTRUCTION   S ORPHEUM THEATER

4)I STE. 300   H ATTN MIKE JENNINGS

5)I 1408 N. KINGSHIGHWAY   I 9TH AND LOCUST

6)L ST. LOUIS, MO   63113   P

7)SLSP: **7:229** EBY:**CC** CBY: PBY: SBY:**TCP** ORDR:**08/31/06** WANT:**08/31/06** CHGD:

 8)   DLVR: SHPD:**09/01/06** INVD:

9)B/O:Y   EXT TKT:Y   SHIP VIA:**DELIVERY**   CPO:**25071**

10)TAX CDS:1   CPR:3   CDC:2 BE: .0   RCVD BY: CPY:0

11)

SUB-TOT:	61.83
TXBL SC:	.00
TAX:	4.71
FREIGHT:	.00
SPL CHG:	.00

	66.54

12)   (D)ETAIL, (N)EXT, PRE(V)IOUS, (S)EARCH, EN(T)RY OR (E)ND

Example 5: Display of the body of the ticket:

Note: Prices are only displayed for office use.

Line 1 Branch number, customer number, tickets number, whether the ticket is *open*(any stage previous to billing)/*billed*(any ticket that was totally completed through the billing process on the day you are looking at it)/*history*(any ticket completed through the billing process previously) and that you are in ticket inquiry.

Line 2 This line is the display bar to describe what each column shows.
  LN-line number of the ticket
  T-type of sale (stock 1, non-stock 2, comment line 3, labor 4, special charge 5 freight 9)
  ORD-quantity of product ordered or shipped (see line 11 for instructions of how to switch between o/s)
  U-unit of measure (e/c/m)
  REQ-how the product is requested (ordered, transferred)
  STG-whether the product is will called or staged for delivery
  REF-lists the will call number, initials of person will calling product, purchase order number, transfer number (note: will call number only appears on lighting tickets and branch 1 electrical)
  PRICE-price per item
  SP-places an E to identify that the item is a quoted product
  TD-office use
  CD-office use
  EXTENSION-price total of all items purchase on this line

Line 3 This line displays the NAED/vendor number of a product and the description.

Line 4 Line number on the ticket of the item
  Type of sale (stock 1, non-stock 2, comment line 3, labor 4, special charge 5 freight 9)
  Quantity ordered/shipped (see line 11 for instructions of how to switch between o/s)
  Unit of measure
  Whether the item is will called or staged (indicator is a W for any ticket other than whole house or S for any whole house ticket)
  Quantity of product will called or staged
  TBO (the first Y/N indicates if the item as answered yes or no if it was ok to order, the second Y/N indicates if the item is able to be backordered)
  Individual price for an item
  Extended price for the product purchased for this line

Line 5 Room location
Line 6 L-location (for lighting branches and branch 1 electrical
  Quantity will called
  Will call location
  Initials of individual of person who will called product.

Line 7 R-purchase order information
  Quantity ordered on this purchase order for this ticket
  Purchase order number

Line 8 T-transfer information
Quantity of product transferred
Branch number the transfer originated from
Transfer number

Line 9 Comment line

Line 10 Line number indication for a comment line

Line 11 (C)ontinue allows more lines of the ticket to be viewed.
(D)isplay from line allows a search to be done from a specific line number.
(H)eader takes the search back to the header.
(S)earch is used to begin a new search.
(O)rder/Ship allows the quantity shipped of a product to display. Inquiry automatically brings up the quantity ordered.
(END) will take the screen back to the main menu.

Example 5:

1)**BRANCH#**: 8 **CUSTOMER#:** 83 **TICKET#**: L43029-00   **OPEN ORDER   TICKET INQUIRY**

2)   **LN T   ORD U REQ/STG REF   PRICE SP TD   CD EXTENSION**
3)785247-43280 PRP4328-09
4)   14 2   1   E S   1 TBO:Y/Y   169.00   169.00
5)   ROOM:BREAKFAST
6)   L   1 S28   LA
7)   R   1 LDR003061
8)   T   1 5D01438
9)   SPECIAL ORDER ITEM! NOT RETURNABLE.
10)   15   3

11) (C)ONTINUE, (D)ISPLAY FROM LINE, (H)EADER, (S)EARCH, (O)RDER/SHIP OR (E)ND

DELIVERY MAINTENANCE

      1   DELIVERY BOOK MAINTENANCE
      2   ROUTE BOOK MAINTENANCE
      3   TICKETS TO PULL
      4   TICKETS TO DELIVER
      5   TICKET CHANGES
      6   ROUTE LIST
      7   CHANGE SHIPPING LOCATION
      8   BRANCH CRITICAL LIST
      9   LIST TICKETS AT CENTRAL WAREHOUSE

Option 1 is what is used to schedule all deliveries. All requests for delivery should be directed to the service department.
      Tickets can be scheduled for delivery as far as you want in advance.
      The tickets can not be entered any fewer than 3 days before delivery.
      All deliveries will be pulled from 3-10 days in advance.
      If an order comes up for delivery with fewer than 3 days, the router must be contacted to see the availability to deliver. (THIS SHOULD NEVER BE A STANDARD PRACTICE! IT SHOULD ONLY BE IN EMERGENCY CASES!!!!)
Option 2 will be used only at branch 5.
Option 3 will be used only at branch 5.
Option 4 will be used by branch 5.
      This list can also be printed at branch to see what tickets have been scheduled for delivery.
Option 5 will be used only at branch 5.
Option 6 will only be used at branch 5.
Option 7 will be used to change a shipping location (branch 8 to branch 5/branch 5 to branch 8 etc).
      It can be used by branch 5 or Branch Managers. If a salesperson needs to change which store a ticket is shipping from, they must see their manager to do so.
Option 8 will be used only at branch 5.
Option 9 can be used by branch 5 or at branch level to view a list of what tickets are currently at
      Branch 5 for delivery.

Processes at Branch 5:
      1)Pick list will be printed between 3-10 days in advance to will call deliveries.
      2)There will be no pick list printed for will calling at Branch 5 until delivery is scheduled.
      3)No shipper will be printed at Branch 5 until after 2pm the day before shipping .
      4)Delivery drivers must get a signature on all tickets. They should also have customer print name below signature so it is legible. In the future, the router will be entering who signed for the ticket in the computer so it will be viewable to all employees.
      5)All shippers will be distributed to Branch Managers at the end of each day. The branch managers must match these shippers with the pick tick copies and Po's if necessary. The shippers should then be sent to St Louis with books.
      6)Stores will have an additional report at the end of the day book processing to assist in keeping what tickets are coming back to them well organized. It will list all shippers done at Branch 5 on the day in question. This list should be used to verify that all tickets have come back to the proper branch. The day after

shipping, the installation department will view all backorder tickets and determines if the backorder should be handled at the branch level or through service and prints the ticket to the proper store.

7)Spec and Displays homes will be handled in the same manor as whole house as far as shippers go. It is the goal to no longer have any backorders so the shippers getting printed at time of delivery shouldn't be a problem. If there is an item missing from the order, the picker at branch 5 should contact the salesman and attempt to sub the missing item before the job ships. If this is not possible, we will have to deal with how to handle the tickets on an individual basis.

8)Lighting retail tickets stay at branch level. Large retail tickets can be sent to Branch 5 by changing shipping location if necessary. This should be run through Branch Manager always!!!!!!

IMPORTANT FACTS:

1)WANT DATE ON ALL STANDARD SUBDIVISION(TRACK HOMES) SHOULD BE ENTERED AT 4 WEEKS PRIOR TO CLOSING DATE.(CUSTOM HOMES MAY VERY SLIGHTLY ON WANT DATE)

Zoltan will be ordering from this date. In order for this system to work properly, it is **NOT ACCEPTABLE** to adjust the want date to try to get the product in earlier.

2)DO NOT FAKE CLOSING DATE ANYMORE. IT SHOULD BE AS ACCURATE AS POSSIBLE.

3)WHEN WRITING A TICKET TO SHIP FROM BRANCH 5, NEVER SAY YES TO TRANSFER INSUFFICIENT STOCK IN FROM ANOTHER STORE.

4)MATT WILL ORGANIZE WITH ALL OUTSIDE SALESPEOPLE TO FILL IN OUR BUILDERS ON THE NEW WAY OUR HOUSES WILL SHIP. THEY WILL BE INFORMING THEM OF HOW HOUSES WILL SHIP, FROM WHERE THEY WILL SHIP AND MOST IMPORTANTLY THE NEED TO SCHEDULE IN ADVANCE. ALL DELIVERIES MUST BE SCHEDULED AT LEAST 3 DAYS IN ADVANCE HOWEVER, WE WOULD LIKE AT LEAST 10 DAYS.

ALL DELIVERED TICKETS MUST BE SIGNED FOR AT THE TIME OF DELIVERY. NO EXCEPTIONS!!!!!!

TRANSFER SYSTEM

TRANSFER REQUEST – Go into request entry.

      1) Enter the branch number the material is being requested from.
      2) Enter your branch number.
      3) Return through transfer number. If you are editing an existing transfer, enter the transfer number.
      4) Enter the name of the person who is requesting the transfer in requested by field.
      5) Enter any pertinent information such as ticket number, customer number etc. in the two lines designated for comments.
      6) Tab to continue or C to cancel the request.
      7) Enter the product being requested by putting a / then the part number. If it is a non stock item, put an N in the field. You will then be asked if this a non stock item y/n. Enter a Y. The words NON STOCK ITEM will appear. Clear that out and type in the part number of the non stock item being requested. (You can only request one non stock item per transfer.)
      8) Enter the quantity you are requesting.
      9) Edit the comment lines previously entered if necessary.
      10) Print the transfer request.
When you look at the printed transfer request, the number to the far right is the number of on hand for the branch the product is being requested from at the time the request was made.

TRANSFER SHIPPING – Go into shipper entry.

      1) Enter your branch number.
      2) Enter the transfer number you are shipping.
      3) The product that was requested will come up by line number. Press tab to take the curser to the right hand side of the screen and enter the quantity that is being shipped. Continue with this step until all items being shipped are entered.
      If you do not have the product to send, zero ship the request and contact the person who sent the transfer to let them know the product is not coming from your store.
      4) The option to add additional product to the shipper appears. You may add as many stock items as you wish, however, you can only add one non stock item.
      5) Entry Complete, Ok To Print And Update Shipper? Y/N Enter yes if the information is correct. If you made an entry error, enter N and you can then go back into the shipper and fix the mistake.
      6) Enter the shippers name or initials.
      7) Print the shipper. ALL PRODUCT MUST HAVE A SHIPPER WITH IT WHEN IT GOES ON THE TRUCK.
ALL PRODUCT BEING SHIPPED TO ANOTHER STORE MUST BE DOUBLE CHECKED BEFORE LEAVING YOUR STORE. NO EXCEPTIONS!!!!!!

TRANSFER RECEIVING – Go into receiver print.

      1) Enter your branch number
      2) Enter the transfer number.
      3) Enter your name or initials.

4) Print the receiver to your screen number. (This is located in the top left hand corner of your screen.)
5) Go into receiver entry.
6) Enter your branch number and the transfer number.
7) Enter the quantities of the product that you have received. **ALL PRODUCT BEING RECEIVED AT YOUR STORE MUST BE CHECKED IN BEFORE THE RECEIVER IS ENTERED TO VERIFY THE CORRECT PART NUMBER AND QUANTITY HAS BEEN SENT FROM THE SHIPPING BRANCH.** If you have gotten a different quantity of something than the shipper states, enter what you really have really received.
8) After you have entered the shipped quantities, you will be prompted to re-enter the quantities. This is a double check to make that there are no entry errors.
9) Add y/n- If you have received anything that is not on the original transfer, this is your opportunity to add it. Y- Enter the part number then enter the quantity that you have received.
10) For O'Fallon Lighting and Promenade Lighting, at this point, you will be prompted to print labels for all material that is committed to prior sales. These labels identify the ticket number, lot number etc. that the product goes to. The label has two parts, one for the box and one for salesperson notification.
       a) Affix label to the box and place item in will call.
       b) Enter the will call location in the computer.
       c) Write the will call location on the notification sticker.
       d) Give notification sticker to the salesperson.
       e) Salesperson notifies customer that product is in.

RECEIVING PROCEDURES

Delivery is made by truck line/UPS/FED EX etc: (before the driver leaves)
    1) Count number of skids/cartons.
    2) Verify against freight bill to determine if the proper amount of skids/cartons are being delivered.
    3) Inspect all skids/cartons for any possible damage.
    4) Note on the freight bill:
        Quantity of skids/cartons received **(If the quantity does not match the freight bill, note the discrepancy and have the delivery driver sign.)**
        Condition of product **(if there is damage, please specify)**
        Stamp subject to final inspection/count
        Sign
    5) Keep a copy of the freight bill.

Purchase Order Receiving: (After the truck line leaves)
    1) Get packing slip off of the product
    2) Print a PO receiver
        a) Enter the proper branch number
        b) Enter the receivers' name
        c) Enter the PO number
        d) Enter the number of pieces
        e) Enter what vendor the product was received from
        f) Enter the bill of lading number (freight bill number)
        g) Print
    3) **<u>Count all product</u>** and mark the quantities on the PO receiver.

    4) Enter the quantities in PO receiver entry. Under **NO** circumstances should anyone **EVER** enter a receiver without counting the product **FIRST**.

    5) Distribute product to proper branches. When all distribution is done for the day, ALL product MUST be double checked against shippers for accuracy before going on the transfer trucks.
        a) If pre distributed, print distribution transfers and separate material.
        b) If pre distribution has not been done, go through distribution process and separate material.
        c) For Lighting, label any product that has printed a distribution sticker for a specific job/ticket.

    6) Attach PO receiver, packing slip, and freight bill together and send to St Louis for filing.

Problems:
    1) An item is listed on the packing slip but was not received.
        a) Make an **accurate** notation on the packing slip/receiver of what was not received.
        b) Contact vendor to report shortage. Make an accurate notation on packing slip/receiver of the date and time this conversation occurred.
        c) Either the vendor should send replacement product, a credit will be issued or short pay authorization will be given. Note clearly which option the vendor is choosing on the packing slip/receiver.

*If a credit or short pay authorization is to be given, forward all paperwork to Accounts Payable (Marty) immediately.
*If replacement product is being shipped, copy the receiver and packing slip and keep until you have rectified the issue (received the missing product) with the vendor. Forward all original paperwork to Accounts Payable (Marty) immediately. Repeat the receiving process when the product arrives at our warehouse.

2) An item is determined to be damaged before the driver leaves.
a) Sign for product with **accurate** notations made on the freight bill that there is damaged product.
b) If the delivery contains good material also, receive the good product first through standard procedures. DO NOT receive the damaged product in the computer.
c) Send paperwork to Accounts Payable (Marty) for a freight claim to be processed.
d) Fill out a damage label and affix it to the product.
e) Set product aside until Accounts Payable has rectified the issue.
f) If the product was ordered for a particular job, inform the salesperson so they can reorder.
g) If the entire shipment is damaged and it is refused, inform the purchasing agent and Accounts Payable (Marty) immediately.

3) An item is determined to be damaged after the driver leaves.
a) Contact the freight company immediately upon discovery of damage.
b) Ask them if they want to inspect the damage. **Make a notation on the packing slip/receiver of their response.** This will help Accounts Payable in collecting our claim.
c) If the delivery contains good material also, receive the good product first through standard procedures. DO NOT receive the damaged product in the computer.
d) Make **accurate** notations on the packing slip/receiver of the damage.
e) Send paperwork to Accounts Payable (Marty) for freight claim to be processed.
f) Fill out a damage label and affix it to the product.
g) Set product aside until Accounts Payable has rectified the issue.
h) If the product was ordered for a particular job, inform the salesperson so they can reorder.

4) An item is on the packing slip but not on the purchase order receiver.
a) Receive the product that is on the receiver through normal procedures.
b) Contact the purchasing agent and inform them of the additional product that was not able to be received.
c) Purchasing agent will add the product to the PO or give a different PO number to receive the product on.
d) Print a new PO receiver and receive through normal procedures.

5) More special order product was received from the vendor than was ordered.
a) Notify the purchasing agent immediately.
b) Ask them if product should be stocked or if they wish to send it back via RGA. (If the purchasing agent wishes to put the product in stock, the purchaser must have the item made stock in the computer and the proper non stock to stock adjustments must be done.)
c) Either put product in stock or put it aside on RGA shelf to be sent back.

Emailing a ticket or a quote

FOR TICKETS:
Go into TICKET REPRINT FOR BRANCHES.
Enter account number and ticket number.
When the printer number comes up, use the proper printer number.

Electrical Outside Sales	LES
Lighting Outside Sales	LLS
Electrical Purchasing	LEP
Lighting Purchasing	LLP
Electrical Branches	LEB
Lighting Branches	LLB
Accounting	LAR

Answer Y/N to extend pricing on the copy of the ticket.
A new screen will pop up with a number in the top left corner. Do not close this out.
Pull up your email.
Create a new email to the individual you are sending the copy to.
> Click Insert
> Click File attachment
> Click Look in: click drop down arrow and select MY computer
> Double click Local disk (C:)
> Double click WINDOWS (at St Louis only) **OR**
> Double click COMET (at all outlying stores)
> Double click CAFILES
> Double click CATEMP
> Click on the number that appeared in the top left corner of the box that popped up on the screen with the ticket in it.
> Click attach

Continue on with your email as usual.
You may now close out the pop up window with the ticket in it.
If you do not send a lot of attachments with email, the computer will save the path last used to send a copy of a ticket and when an attachment is requested, it may automatically come up to CATEMP.

FOR QUOTES:

Enter your quote as usual.

When the printer option comes up, use the proper printer number.

Electrical Outside Sales	LES
Lighting Outside Sales	LLS
Electrical Purchasing	LEP
Lighting Purchasing	LLP
Electrical Branches	LEB
Lighting Branches	LLB
Accounting	LAR

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Click on the number that appeared in the top left corner of the box that popped up on the screen with the ticket in it.

Click attach

Continue on with your email as usual.

You may now close out the pop up window with the ticket in it.

If you do not send a lot of attachments with email, the computer will save the path last used to send a copy of a ticket and when an attachment is requested, it may automatically come up to CATEMP.

TICKETS

NO PRODUCT LEAVES METRO PREMISES WITHOUT PAPERWORK!!!!

When product gets pulled off the shelf for a ticket, it MUST BE WILL CALLED!!!!! If the product is getting a shipper done on it immediately, you can skip will call update, however, that is the ONLY exception.

When entering a repeat cash customer, ALWAYS look up the cash customer number by name or telephone number and reuse it. It makes cash customer search MUCH easier to use if you don't have the same customer name in the computer repeatedly when it is the same person. This search was put there to assist YOU in referencing your customers. Please use it!! Remember, If you don't know the cash customer number, put a ? in the customer field of ticket search and you can search by name, address or phone number.

If you are selling a display item, make sure you enter the item as a display sale.

If you call for a price change, you MUST reprint the ticket before the price changes go into effect.

If you make changes to a ticket, REPRINT it with the changes.

Make sure you post your payments correctly. Posting incorrectly negatively effects daily books. Always look at your balance due and previous payments, we are experiencing many double payments lately and this needs to stop!!!!

DO NOT post a payment you DO NOT have. EVER!!!!!!

Once a ticket is written, it CAN NOT be changes from cash to account or vise versa.

If a ticket is being written to ship from Promenade (whether retail, whole house or service), you MUST change the shipping branch to 5.

If a service ticket is written at branch level, please write it with customer number 605, your own branch number and change the shipping branch to 5. This will enable payments to be made without messing up where the payment is posted on daily books. ALWAYS use customer number 605 for tracking purposes UNLESS it is an account ticket.

ALL service tickets MUST have as much of the following information as possible:
Customer Name
Lot
Subdivision
Builder Name
Current Address
New Address

Phone Number (home or work and cell)
ORIGINAL TICKET NUMBER
Comment lines explaining why service is being done.
ALL payments MUST be collected and posted to the ticket BEFORE it is turned over to the Service Department.
On defective service items, the service department will write the credit and apply it.

DO NOT EVER staple a back order ticket to an original. These are totally separate ticket numbers and should be treated as such.

When applying a credit to a ticket, ALWAYS double check that you have posted the correct credit number. Once a credit has been posted to a ticket, it CAN NOT be undone. Slow down and check your work!

When in ship confirmation, do not F3 out of the shipper. Always use the end option if you do not want to continue with the shipping procedure.

When selling a gift certificate, write a ticket for a gift certificate and take your payment. A credit should then be written with the ORIGINAL ticket number on it. The copy of the ticket and the credit should be given to the customer. Keep the credit on hand at your store until it is used. ALWAYS write the ticket number and the credit number on the gift certificate so it can be posted correctly when the certificate is used.

A hard copy of the builders PO should be attached to the original ticket. If you are given a VPO, put the name of the person who issued it on the ticket.

On whole house ACCOUNT tickets, do not put in an allowance.

CREDITS

If you do not have product in hand, you should not be writing a credit for a return.

When writing a credit, don't forget to use the correct 1S, 1B, 2S, or 2B. Also keep in mind that the reason codes A, B and C are to be used ONLY for defectives. D, E, F and G are used for stock returns.

When doing a credit card return, MAKE SURE you swipe the credit card as a CREDIT on the credit card machine!!!!!!!!!!!!!!!!!

If you do a defective credit, make sure you write a new ticket to reship the material and apply the credit to the new ticket.

Overpayment is only to be used if the ticket is complete and there is a balance due back to the customer on the ticket.

Price adjustment is to be used if a customer was charged too much on a ticket and we are refunding money for this price change. Price adjustment should be used if the ticket does NOT show a balance due back to the customer.

Price adjustments should be done line by line, not in a lump sum.

Keep in mind, if a customer has returned items and has an overpayment, you can do both of these on the same credit. They do not have to be on separate credits.

When you apply a credit, ALWAYS leave the negative sign in the amount. If you have to change the amount being used, make sure you put back the negative sign.

TRANSFERS

If an item is requested from your display, <u>ALWAYS </u>remove it from your display <u>BEFORE</u> the transfer shipper is done.

Transfers should be pulled in a timely basis. If the product can't make it on the store to store truck the day the request is received, it should <u>ALWAYS</u> be on the truck the following day. Most transfer requests to the branches are sold product and must be sent right away to service our customers properly!

If you need to know what a transfer number is for an item being requested for a ticket, you can find this transfer number in ticket inquiry along with PO numbers and will call locations.

If you need to know who requested, shipped or received an item, go into transfer inquiry and put your branch number and transfer number. All pertinent information will be listed.

Ticket Search

This program provides a wealth of information. Please read this chapter very closely. You will possibly find many new ways to make your searches easier!

QUOTES

The quote system is very similar to ticket entry. If you have any questions, the chapter in the book covers almost everything, however, if you still have questions, your managers should be able to answer them.

DEFECTIVES

Most defective product is taken care of on credits. If you find something defective on your shelf, add the product to the defective list that your manager should have. If the

product is defective on display, take the item out of display inventory and then add it to the defective list. These lists should be sent down to Terri on a regular basis so the product can be removed from inventory.

DISPLAYS

Make sure you put all sold display items on the ticket PROPERLY!

If you put something on display, MAKE SURE you put it up to display in the computer!!!!

If you take something down from display, MAKE SURE you take it out of display in the computer!!!! If it was sold on a ticket as a display item, it was already removed.

If an item is transferred to your store for display, you <u>MUST</u> receive the transfer <u>BEFORE</u> it is put up to display.

SPECIAL ORDERS AND NON STOCKS

If you get a special PO quote for a product you are selling, you MUST relay that quote price to the purchaser. It does NOT show on the buy request or order report!

If you find yourself in the situation that you need to take back a non stock, I will be in contact to find out if you are requesting an RGA or if the product will enhance our inventory and will be made stock. Please remember, it is your responsibility to request the RGA on non stock returns and that they need to be sent with the RGA to me at St Louis for return.

Ticket Splitting

The purpose of splitting tickets is to track multiple shipments under the same ticket number, for Whole House, Spec or Display tickets with rough-ins, cans, lights and bulbs.

The lines on a -00 ticket can be split to 50 (rough-ins), 60, and 70 tickets which will run through the system as N/C. You will only see average cost extended on the 50, 60 and 70 tickets, while the -00 ticket retains all line extensions except for the average cost on the split lines.

When you print a -00 ticket with lines flagged to split, you will be asked if you want to generate the split tickets now, allowing the print of a working copy without actually creating the 50, 60 or 70 split tickets yet. Along with this question you can move any one or more of the split tickets between the home branch and central warehouse. Once a split type, 50, 60 or 70, has been generated you can no longer move between warehouses and any changes for that type of split will happen when the -00 ticket is printed.

Checking is done for will called lines flagged to move to a split ticket, and if the split is not shipping from the same branch as the -00 ticket, the print will not continue until these lines are un-will called.

Once the split tickets are generated you cannot directly add to or delete from them. Order entry will only allow printing of the 50, 60 and 70 tickets. In order to add to or delete from the generated split tickets you must make the changes on the -00 ticket as long the split tickets have not had shipments. The lines deleted from the -00 ticket will happen immediately on the split ticket but you must print the -00 ticket before the added lines will show up on the 50, 60 or 70 tickets.

Until a line is generated to a split ticket, you can change its line code between types of splits, 50, 60, 70 or blank for no split.

Unlike backorders, all line numbers on the splits and their backorders will remain the same as the -00 line number. You can have up to nine backorders for each type of split ticket (ex. -50 can have between -51 to -59).

Quotes can have lines designated with split codes and when the quote is made an order these lines can generate split tickets once the new order is printed.

We will check the original ticket to see if it has enough allowance or payment before shipment can be made on the 50, 60, or 70 tickets. On W/H tickets 60's & 70's can't go out until 00 is paid in full.

The zero N/C split tickets and their backorders (-50 through -79) will not print or go to A/R. You also can't post a payment to any split ticket or their backorder – they are shipping copies only.