

SELLING ITEM FROM ANOTHER STORE'S STOCK

Steps While Customer Present

Step 1) Add all Items to the Sale.

Step 2) Make sure you have a customer assigned to the sale.

Step 3) If Customer is taking nothing with them, click the "Special Order All" button below the items on the sale. If the customer is taking anything with them, click on the product name of ANYTHING THEY ARE NOT TAKING, then click on the "Move to" drop down field, select "Special Order" and click Save. Repeat this for every item that needs to be picked up or delivered later.

Step 4) Click the green "Payment" button on the right.

Step 5) Click the "Add Deposit" button and enter the deposit amount and type of payment, and last click OK to apply the deposit. If the customer was taking any items from step 3, add those payments like normal. Last add the payment method (Cash, Check, etc) to the payment screen.

Step 6) Click the green "Finish Sale" button to apply the deposited payment and print a receipt for the customer.

Special Order All

Move To
None
Layaway
Special Order

Payment

Add Deposit

Finish Sale

Steps After Customer Has Left

Step 7) Click the main menu "Inventory" link, then click the "Transfers" button, and finally click the green "New Inventory Transfer" button in the upper right corner.

Step 8) Create and Save the Transfer Request.

+ New Inventory Transfer

- Make sure you choose the store you are pulling stock from in the "From/Sending Shop" drop down.
- Click **Save Changes** in the top left of the screen.
- Click the blue "Special Orders Link" that appears on the left.
- Find the item and customer you need to add to the transfer request and click the "+ Add" button.
- Click the blue "Details" link on the left side and then click the "Send All Items" button.
- Enter amount moving to your store in the "Received" box and click the "Add Received Items to Inventory", then click Ok to confirm transfer.
- This will now put the safe in your inventory and lock it to your customer so no one else can purchase it by mistake. You are now done until the safe is installed.

+ Add

⚠ Send All Items

Steps to Remove Held Safe After Delivery Team Takes It

Step 9) Now it is time finalize the sale and remove the item from A-1's inventory.

- Click on Customers in the Main Menu and search for your customer, then click on their record.
- Click the blue "Special Orders Link" that appears on the left.
- Find the order you need to close and finalize, then click on the shopping cart icon to open the sale.
- Click the "Complete All" button near the bottom middle.



Complete All

Step 10) Click the green "Payment" button on the right and apply the credit from their account to finalize the sale and remove the safe from the other store's inventory.

Payment