



TeleChoice

PRONTO POS Training

Welcome to TeleChoice. This training is designed for all TeleChoice team members in sales associate role. The main course objective of this training course is to give all participants a seamless view of the flow between specific PRONTO modules and how they assist the business.

PRONTO Team
16/09/2010

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Chapter 1

INTRODUCTION

Overview

PRONTO is a fully integrated Enterprise Management System, linking together processes which logically or functionally belong together. Duplication of work effort is eliminated through streamlined data entry and updates.

PRONTO is menu driven and easy to use! A uniform menu structure and clearly organised screens guide users through the programs. An easy to use interface ensures that different tasks may be readily performed by applying the same familiar techniques.

Throughout the training course there will be exercises that we are going to complete. Please refer to additional material for product code & IMEI information.

Objectives

At the end of this chapter, participants will have the opportunity to:

- Understand the course objectives and course outline
- Understand how PRONTO interacts within a TeleChoice franchise
- Identify who will use PRONTO in the day-to-day business.

Chapter 2

PRONTO OVERVIEW

Overview

The purpose of this chapter is to give participants an overview of the PRONTO system. This chapter will cover login procedures, navigation around PRONTO and the associated function keys.

Objectives

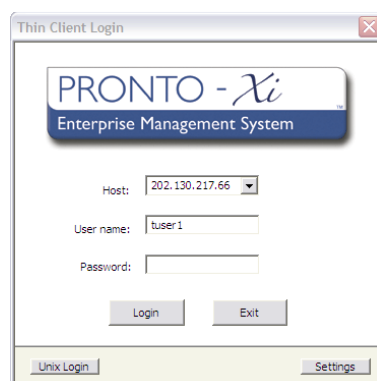
At the end of this chapter, participants will have the opportunity to:

- Have an understanding of the sales and inventory module
- Recognize the login process of the PRONTO System
- Navigate around the PRONTO System

PRONTO login

To open a connection to the PRONTO server, double click on the PRONTO icon on the desktop or select "PRONTO Thin Client" from the Windows Start menu.

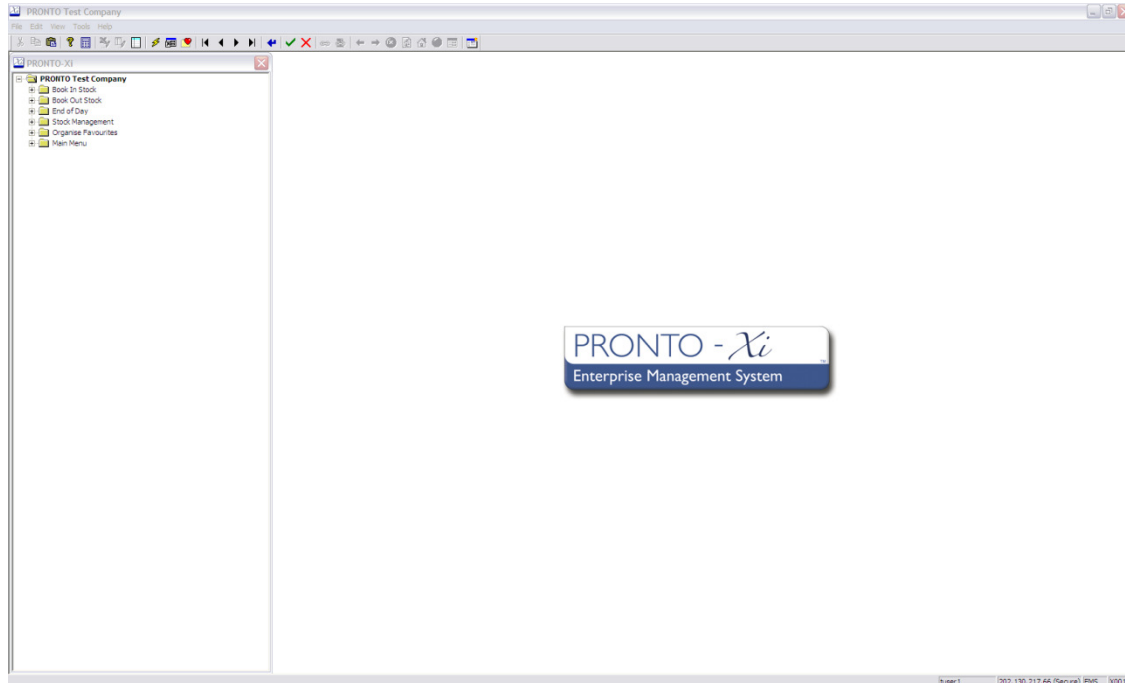
PRONTO opens a new screen like the one below, and asks for your username and password. Once logged onto the system, you will see the menu options that are established based on the security level set for your username.



**Please enter username and password.
Refer to additional course material for
login details.*

Navigating around PRONTO

The menu options on the left are linked to your login and the level of security for that login. For example, sales associates will not see the same screen as the store manager. For the purpose of this training, the screen you are now viewing will be known as the “main menu”.



PRONTO uses a number of different ways to navigate around the system

When instructed, follow the instructor’s moves around the PRONTO system using the tools listed below:

- Keyboard navigation versus mouse navigation
- Data grids – sorting, moving columns, etc
- Managing the favourites menu
- Closing and opening menu options
- Opening additional PRONTO sessions
- Copy and paste function

We are concentrating on the areas that are covered in this module and will move into these menus to show their location:

- Book in Stock
- Book out Stock
- End of Day
- Stock Management

Chapter 3

BOOK IN STOCK

Overview

In this chapter, we are going to show you the main features of PRONTO's Purchase Order system. The overall aim of this chapter is for TeleChoice team members to understand and operate the basic fundamentals of the PRONTO Purchase Order system.

Objectives

At the end of this chapter, participants will have the opportunity to:





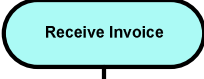

- Raise a purchase order
- Receive stock
- Maintain an existing purchase order
- Reprint a purchase order
- Cancel a purchase order
- Release a purchase order update lock
- Process a goods return order
- Generate the Outstanding Purchase Order Report.

Introduction to Purchase Orders

In this chapter we are going to look at the Purchase Order System.

The standard way to order stock from supplier is to raise a purchase order in PRONTO, print the purchase order and email Head Office Inventory for approval. Once approved Head Office Inventory will forward order to supplier. When the stock arrives, you will then have to receive the stock via the purchase order module. PRONTO will then update the stock quantity level and keep a record the status of every purchase order (Table 1.1)

Table 1.1

Stock		Order Status
On Order		Ready to Print
		On Order
		Goods Received
On Hand		Goods Updated
		Ready to Post Invoice
		Completed

Purchase Order Numbering System

In this section we are going to look at raising purchase order.

When creating a new purchase order number, PRONTO assigns the next sequentially available order number. PRONTO then assigns a suffix to the order number, whenever the status of the order varies across the components of the original order.

Order Number	Status
100	On Order

Assume that PRONTO has allocated purchase order number 100 to a standard order.

Order Number	Status
100	Received
100AA	Back Order

The order is then partially received. Order 100 will then have effectively been split into two parts. PRONTO automatically create a new purchase order (100AA)*, for the components that are not received yet.

** The first purchase order suffix allocated on the original order will always be AA, then AB, AC and so on. Should only part of the back order then be received, the order would then split again (shown below).*

Order Number	Status
100	Received
100AA	Received
100AB	Back Order

Any action that assigns a new status to only part of an order will effectively create two orders split from the original. One is assigned to the existing purchase order number; the other is assigned to the original invoice number followed by the next available suffix. Actions that will cause this to occur include the partial receipt of goods and returning or exchanging part of an order.

Purchase Order Entry

In this section we are going to look at raising a purchase order.

Before raising a purchase order, you would at least need the following information:

- Supplier Name
- The item code/s
- Quantity

**Please refer to additional training material for product code information.*

Please follow the step by step instructions:

Book in Stock → Create Purchase Orders

Enter Purchase Orders

Order Details
 Supplier:
 Order Type: **Normal Order**
 PO Order No.:

Order Point
 Delivery Warehouse:
 Del Instructions:

Dates
 Ordered Date:
 Action Date:
 Due Date:

Other Details
 Currency:
 Initial Rate:
 Final Rate:
 Order Terms:
 Buyer Name:
 Project:
 Category:
 Catalog No.:
 Tender No.:
 Supplier Ref./Notes:
 Tax Code:

Supplier Address
 Name:
 Address:

 Postcode:
 Phone:
 Fax:

Delivery Address
 Name:
 Address:

Delivery Instructions
 1:
 2:
 3:
 4:
 5:
 6:
 7:

Create Purchase Order:

1. Enter the supplier code (Press **F2** to list all suppliers).
2. Order type is “**N**” for normal orders.
3. Press tab/enter in “PO Order No”.
**PRONTO will then allocate a purchase order number automatically.*
4. Enter the store warehouse number.
5. Press **F4** to populate all the rest of the header details
6. Select the “**Lines**” option.

Seq#	Item Code	Ordered	Unit	Disc	GST	OK	Note
1	12711011	5	EACH	10.0000%		Y	

7. This section is where you enter the items you want to order. To search for the item code press **F2** to list all items. Select **description** and search by **keyword**.
8. Enter the quantity you wish to order.
**Enter the price, if different to the default price in set up.*
9. Press “Enter” across the fields.
10. Select “Quit” or press “Q” to quit.
11. Accept status update “P” and then select Print and Finish Order.
12. Select the default date. At this stage the report will be spooled. Press F5 to retrieve and print the report.
13. Email the purchase order to Head Office Inventory Manager.

Receiving Stock

In this section we are going to work through the process of receiving stock against the purchase order you have just raised.

Please follow the step by step instructions:

Firstly review the purchase order against the delivery docket or invoice

Book in Stock → Receive and Update Purchase Order

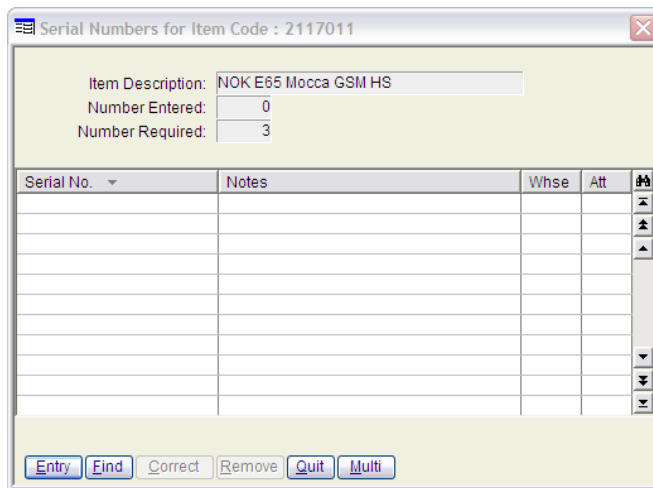
**Find the purchase order number and select "Lines" or press "L"*

Please review:

- Item codes against delivery docket or invoice.
- Quantity received against the quantity ordered.
- Cost price against the price on the delivery docket or invoice.

Receive Goods:

1. Maintain purchase order:
Book in Stock → Receive and Update Purchase Order
2. Select **“Goods Receipt”**
3. Enter the receiving warehouse number.
4. Select **“Item Receive”**
**If all items in the purchase order have been received, please click on “Item Receive” against all lines. Otherwise, only click on “Item Receive” against goods that have been received.*
5. Enter new price if different than the default price in PRONTO
**(For this example, use the default price)*
6. Enter the quantity received and enter through until the following screen comes up:



- *This item is a serialised item therefore you will need a serial number for each stock.*
7. Select **“Entry”** and enter the serial numbers until you have entered all the serial numbers. In this case there are going to be 3 serial numbers and then select **“Quit”**
 8. Select **“Quit”** again and then press **“Tab”** to enter the delivery docket or invoice number received from the supplier. For this exercise, let’s use **“TEST123”**.
**Although the Purchase Order status has changed that doesn’t mean that it automatically updates the inventory to reflect the stock movements. This has to be done separately.*

Update Purchase Order:

1. Review purchase order by selecting **“Lines”** and confirm the goods received.
2. Click or Press the Enter on **“Receive and Update Purchase Order”**
3. **Find** and **Select** the Purchase Order
4. **Select** Update
5. **Enter** all the way and OK

Maintain Purchase order

We are able to modify/cancel purchase order if the order is still in status of “On Order”. Some of common modification:

- Cancelling an order
- The order quantity
- Add/Remove Items.

In this section we are going to go through ad-hoc Purchase Order Maintenance including:

- Purchase order status and what they mean.
- Release an Update Lock on a Purchase Order
- Modifying Existing Purchase Order (Including Cancelling)
- Processing Goods Return
- Print an Outstanding Purchase Order Report

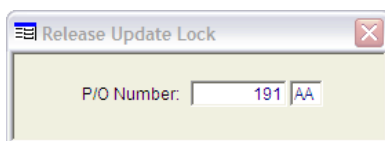
Purchase order Status

Status	Description
On Order	Stock is on order
Back order	Stock partially received, some still on order
PO Approval required	Purchase order require approval
Return rdy to print	Purchase order ready to be printed
Goods Updated	Purchase order has been received and goods have been updated.
Completed	Purchase order has been updated and completed
Cancelled	Purchase order has been cancelled.

Release Update Lock on a Purchase Order

This function is to be used to release the update lock on purchase orders that became “**Blocked**” due to session termination during a purchase order process. You will receive an error message: “**Please unlock order using the Release Update Lock function**”.

Book in Stock → Unlock Purchase Order



Enter the purchase order number (including any suffix, if any) and then press enter twice.

To cancel purchase orders

Book in Stock → Receive and Update Purchase Order

- Find the purchase order number
- Select “**Cancel**” and confirm

Other modifications

Book in Stock → Receive and Update Purchase Order → Lines

Other modifications are done within this screen.

- Select “**Find Item**” to find the stock code
- Select “**Correct**” to edit quantity or other details within the line
- Select “**Entry**” to enter a new line
- Select “**Remove**” to remove a line

Processing Goods Return

There are different reasons why stock is returned to a supplier. These reasons are:

- Stock rejected on delivery.
- Stock item returned by a customer because it is either Dead on Arrival (DOA) or Early Life Failure (ELF). This is common with mobile phone handsets.
- Stock receipting errors that need to be rectified.

If stock has been sold out (booked out) to a customer, a sale refund is to be done first before the stock is returned. Refer to Invoice Processing on how to refund a sale.

Before we can process this transaction we need to have the following information:

- Supplier
- Original Purchase Order number
- The item code and the quantity
- The IMEI number (For serialised stock)

Book in Stock → Create a Purchase Order

1. Enter the supplier code (Press **F2** to list all suppliers).
2. Order type is “**R**” for return orders.
3. Enter the original purchase order number.
**PRONTO will then allocate a purchase order suffix automatically.*
4. Enter the store warehouse number.
5. Press **F4** to populate all the rest of the header details.
6. Select “Lines” and the following screen will come out.

7. Select “**OK**” and select “**Part Return of the Original Order**”.
8. Select “**Edit Qty**” on the line which you want to return. PRONTO will then change the code from D to Q. Press “**Tab**” then enter the quantity which you want to return.

9. For serialised item you will need to select which IMEI numbers you are going to return.
10. Select “**Entry**” and enter the IMEI number, keep pressing “**Enter**” until finished.
11. Once all IMEI have been selected press “**ESC**” and then Select “**Quit**”
12. The status of the purchase order will become “Ready to Return”
13. Book in Stock → Receive and Update Purchase Order and then update the purchase order.

Outstanding Purchase Order Report

Review all outstanding Purchase Orders and either cancel or follow up with Supplier.

Follow the steps in this section to generate the Outstanding Purchase Order report. All entries in this report must be cleared as part of the end of month process.

Book in Stock → Outstanding Purchase Order Report

1. Select Report Mode “D”
2. Continue pressing “**Enter**” until you are at the Warehouse field.
3. Select warehouse code
4. Continue pressing “**Enter**” until you are at the End Received Date
5. Enter the current date.
6. Press “**Enter**” to generate report and once the report has finished spooling; the XML PRONTO Report Viewer will automatically open on your screen with the report displayed.

Chapter 4

BOOK OUT STOCK

Overview

In this chapter, we are going to show you the basic features of PRONTO's Point of Sale System. The overall aim of this chapter is for TeleChoice team members to understand and operate basic fundamentals of the PRONTO Point of Sale System.

Objectives

At the end of this chapter, you will have a chance to:

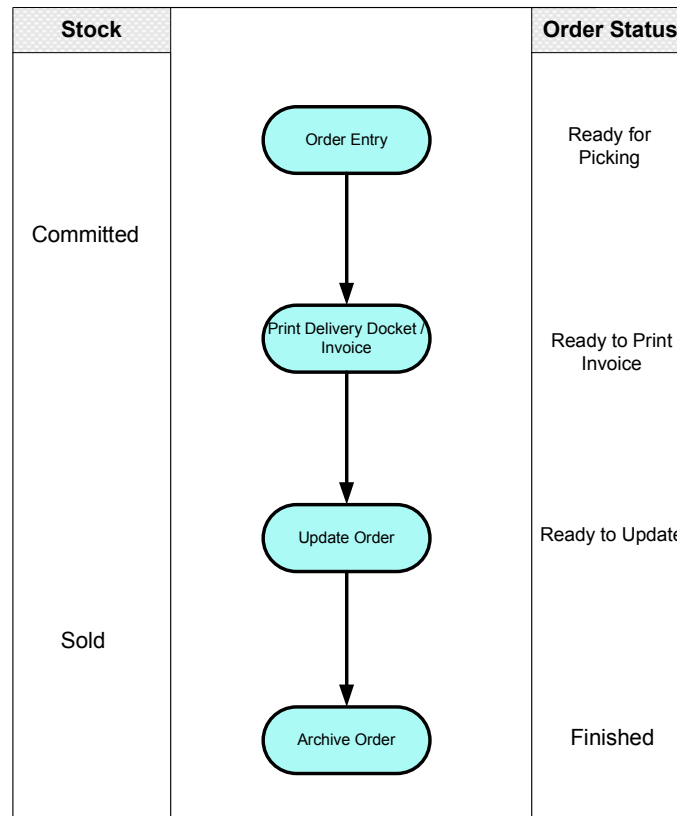
- Create a customer account
- Process a serialised product sale and review a kit code set up
- Process a non-serialised product with multiple items sale
- Process a prepaid handset sale
- Process a sale using the price override function
- Process a refund
- Process a transfer order

Introduction to Point of Sale

The Point of Sale module is a subset of the Sales Order Processing module. It combines the powerful features provided in PRONTO Sales Order Processing, together with a streamlined user interface, and interface to a cash drawer. Some features of the Point of Sale System:

- Cash Drawer management and full history
- Easy Sales recording
- Auditing and security protection
- User defined Point of Sale transaction limits
- Refunds and exchanges
- Multiple cash receipting methods. For e.g. Cash, Cheque, AMEX, Diners Club, MasterCard, VISA, EFTPOS, etc.

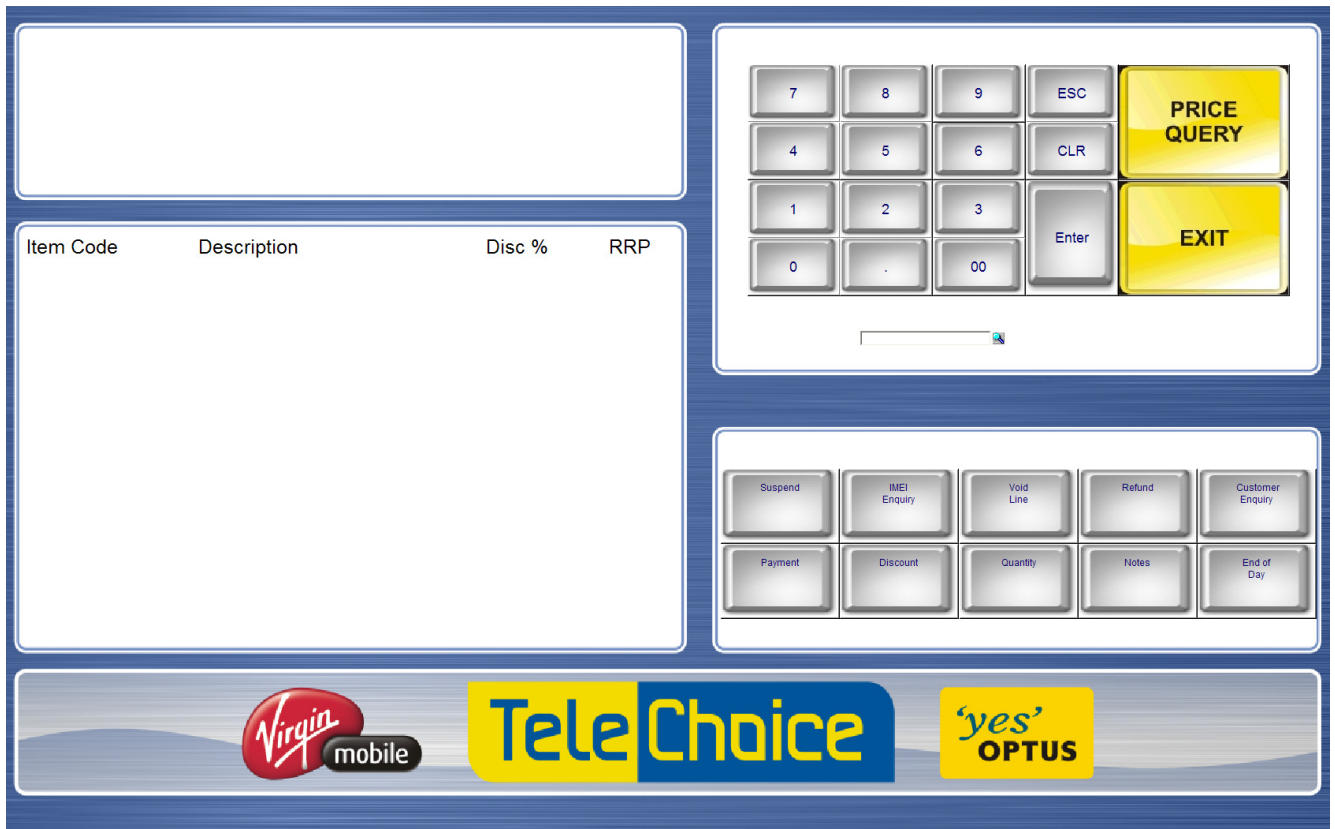
PRONTO Sales Order Process



There are three typical sales scenarios that we are about to look at:

- The first is a very straightforward sale of an un-serialized product – that is, a product that doesn't have individual serial numbers for each item. Most of these products are accessories. The customer is paying by cash
- The second is the sale of a prepaid mobile phone, which is a serialized product. In addition to this, the customer is also purchasing some un-serialized items. The customer is paying using his MasterCard
- The third scenario is for the sale of a mobile phone on a rate plan. As this is postpaid account, the customer is not required to pay for the handset.

General Overview of the Point of Sale Screen



Name	Description	Name	Description
Suspend	Suspend a Sales Order	Payment	Use this option to finish a sales order and select tender type
IMEI Enquiry	Serial/IMEI enquiry	Discount	Use this option to apply a percentage discount
Void Line	Remove a line on the order	Quantity	Adjust quantity for items being booked out
Refund	This option is used to process a refund. The number of the original order and, if applicable, the order suffix are entered on this screen as well as the name, phone number and address of the customer	Notes	Add notes to the order
Customer Enquiry	This function provides the facility to perform a full customer enquiry for a specified customer	End of Day	This Menu lists the End of Day Processes

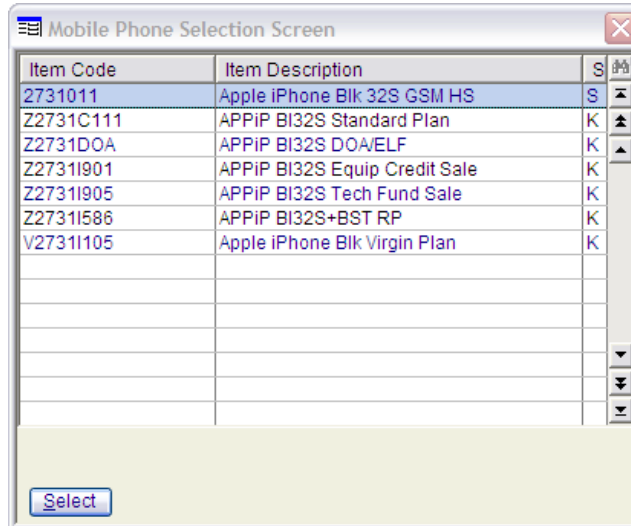
Customer Details and AMTA Requirement

Firstly we need to understand that AMTA is required for certain products, and they are outlined on the table below:

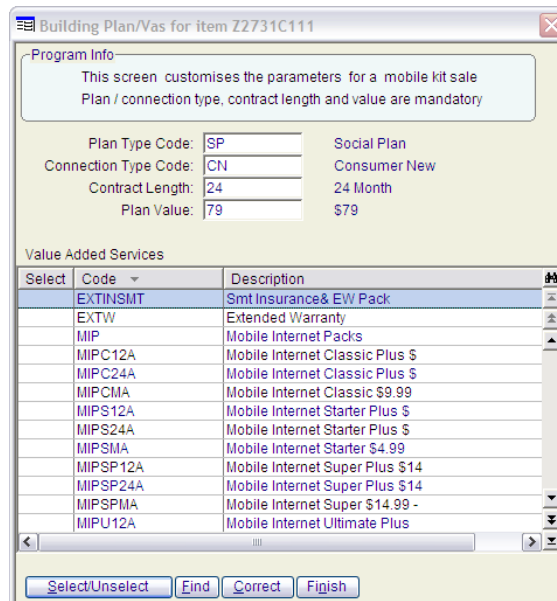
Code	Group Description	Group Type	Customer Details	AMTA
L002	Loyalty Card	Service	Yes	No
W006	Virgin Prepaid Handsets	Handsets	Yes	No
W007	Handsets	Handsets	Yes	No
W036	Wireless Prepaid	Prepaid	Yes	No
W037	Virgin Prepaid Products	Prepaid	Yes	Yes
W038	Boost Prepaid Products	Prepaid	Yes	Yes
W039	Optus Prepaid Products	Prepaid	Yes	Yes
W042	Virgin Starter Kits	Starter Kits	Yes	Yes
W043	Boost Starter Kits	Starter Kits	Yes	Yes
W044	Optus Starter Kits	Starter Kits	Yes	Yes

Mandatory Forms and Information Required

Plan Selection Screens



Standard Plan



Plan Type Code – Select Plan Type (For e.g. Fusion, Cap, Social)

Connection Type Code – Select Connection Type (For e.g. New Customer, New Business Customer)

Contract Length – Select Length of Contract (For e.g. 24 Month, 12 Months)

Plan Value – Select Plan Value (For e.g. \$79, \$99)

Select/Unselect Value Added Services that you may want to include or exclude from the sale.

Customer Details (Individual)

Name	Customer's Name and Surname
Address	Full Address including Suburb, State and Postcode
Email	Customer's Email Address
Gender	Gender
Date of Birth	Date of birth
Home Phone	Landline Number
Mobile Phone	Mobile Phone Number
Fax Number	Fax Number
Cutomer Heard About Us	Select one of the Options for example TV, Friend etc.

** It is important to make sure that the no other characters besides alphabets and numbers are used*

Customer Details (Business)

Name	Business Name
Contact	Business contact person
Address	Full Address including Suburb, State and Postcode
Email	Business contact person Email Address
Phone	Landline Number
Mobile Phone	Mobile Phone Number
Fax Number	Fax Number
Cutomer Heard About Us	Select one of the Options for example TV, Friend etc.

** It is important to make sure that the no other characters besides alphabets and numbers are used*

Customer Loyalty Card - iNcard Form

First Name	Customer's Name
Last Name	Customer's Surname
Address	Full Address including Suburb, State and Postcode
Email	Customer's Email Address
Gender	Gender
Date of Birth	Date of birth
Mobile Phone	Mobile Phone Number

** It is important to make sure that the no other characters besides alphabets and numbers are used*

Fields with an asterisk symbol are mandatory. Most of the field would have been pre-populated with the information in the customer detail form. Please review and once okay tick the acknowledgement box and click "OK".

AMTA Details (Retail)

First Name	Customer's Name
Last Name	Customer's Surname
Address	Full Address including Suburb, State and Postcode
Identity Requirement	Select 1 ID Type from list A or Select 2 ID Types from list B
ID Confirmation	Review and make sure ID and form matches Documents have not expired IMEI have been recorded on form
Mobile Provider	Select Mobile Provider

** It is important to make sure that the no other characters besides alphabets and numbers are used*

AMTA Details (Business)

Type of Organisation	Business Government Charity
Name	Organisation Name
Address	Full Address including Suburb, State and Postcode
Details and Acknowledgement of Purchaser	Full Name of person in charge
ID Confirmation	Review and make sure ID and form matches Documents have not expired IMEI have been recorded on form
Mobile Provider	Select Mobile Provider

** It is important to make sure that the no other characters besides alphabets and numbers are used*

Exercise 1. Process a Non-serialized Product

To process a non-serialized product sale, you access Point of Sale using the following menu path:

1. Point of Sale Entry:
Book out Stock → Point of Sale Entry



**Enter Operator ID as per additional course material*

2. The following screen will appear:



**Refer to additional course material – No. 1*

3. Type the stock code in the [Entry] field and press “**Enter**”. The outlet you are based at may have set up all accessory items with a corresponding barcode and to quicken the sales process, you will be able to scan stock items rather than type the stock code into PRONTO.
4. PRONTO display details of the product, plus the number of items entered and running total in a list on the left of the screen. You can now click on “**PAYMENT**” and select the tender type.
5. For this exercise, select “**CASH**” and then enter the amount tendered.
6. The printer window will appear and you will have to select the printer that you want to print from.

**As a general rule any cash sale should be printed using the docket printer and all other type of sale using the A4 printer.*

7. Select “pos_docket”. At this point the cash drawer will open and the Tax Invoice is printed. PRONTO tells you how much change to give to the customer (if required) and the “Point of Sale Entry” screen will be redisplayed ready for the next sales order to be processed.
8. Enter “Q” to quit the Point of Sale System.

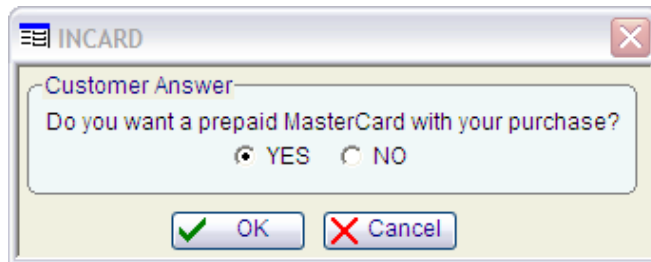
Exercise 2. Process a Serialized Product

To process a serialized product sale, you access Point of Sale using the following menu path:

1. Point of Sale Entry:
Book out Stock → Point of Sale Entry
2. Enter Operator ID and password as per normal
**Refer to additional course material – No. 2*
3. Type the stock code for any accessories in the [Entry] field and press “**Enter**”.
**To change the quantity, type the quantity into the [Entry] field and click on Quantity*
4. You are now ready to process the mobile phone. As this is a serialised product, you can scan/type the IMEI (serial) number into the [Entry] field.
5. The Mobile Phone Selection Screen will appear, as this is an outright sale, please select the ITEM code which is the first on the list.
6. The Customer search screen will appear. You will have to either select an existing customer or create a new one. To select, you can search using the “**Find**” button or to create new, select “**Retail – New Customer**”. You will then have to enter the customer details on the form.

**Whenever a customer buys a serialised product, you should set up a debtor record for them. You need to do this to get the customer details recorded on the proof of purchase, which they will need for their warranty. It'll also carry the customer details across to the Accounts*

- The screen below will appear because the customer is entitled to an iNcard. If you select “No” you will have to provide a reason. To select a reason, please press “F2” to list all available reasons.



- You will be returned to the “Point of Sale Entry” screen and the customer you have just created will be displayed on the left hand side of the screen.
 - You will now have to add the iNcard stock code into the order. (12MTHINCARD or 24MTHINCARD)
 - The iNcard form will appear and you will need to complete it.
 - Now click on “PAY” and select the tender type.
 - For this exercise, select “MasterCard” and then enter the amount tendered.
 - The printer window will appear and you will have to select the printer that you want to print from.
- *As a general rule any cash sale should be printed using the docket printer and all other type of sale using the A4 printer.*
- Select “pos_docket”. At this point the cash drawer will open and the Tax Invoice is printed. PRONTO tells you how much change to give to the customer (if required) and the “Point of Sale Entry” screen will be redisplayed ready for the next sales order to be processed.
 - Enter “Q” to quit the Point of Sale System.

Exercise 3. Process a Serialized Product on a plan

To process this sale, you access Point of Sale using the following menu path:

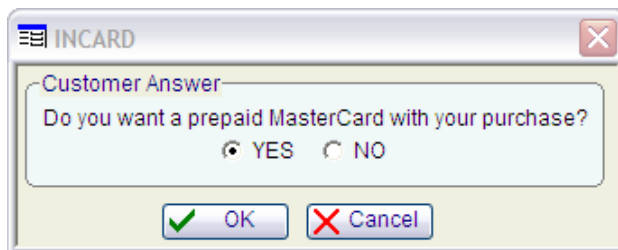
- Point of Sale Entry:
Book out Stock → Point of Sale Entry
- Enter Operator ID and password as per normal

**Refer to additional course material – No. 3*

3. Type the stock code for any accessories in the **[Entry]** field and press **“Enter”**.
**To change the quantity, type the quantity into the [Entry] field and click on Quantity*
4. You are now ready to process the mobile phone. As this is a serialised product, you can scan/type the IMEI (serial) number into the [Entry] field.
5. The Mobile Phone Selection Screen will appear. Select **“Standard Plan”**
6. The Mobile Phone Number Entry Screen will appear:



7. Type in the customer’s mobile phone number that you have been allocated in Focus (make up a mobile phone number for the purpose of this activity) then press **“Enter”**. Re-enter the phone number again to confirm.
8. The Customer search screen will appear. You will have to either select an existing customer or create a new one. To select, you can search using the **“Find”** button or to create new, select **“Retail – New Customer”**. You will then have to enter the customer details on the form.
** Whenever a customer buys a serialised product, you should set up a debtor record for them. You need to do this to get the customer details recorded on the proof of purchase, which they will need for their warranty. It'll also carry the customer details across to the Accounts*
9. The screen below will appear because the customer is entitled to an iNcard. If you select **“No”** you will have to provide a reason. To select a reason, please press **“F2”** to list all available reasons.



10. The **“Build a Plan”** Screen will pop up. Select the appropriate plan type, length and value combination.

For this exercise, select:

- Plan Type Code – **S**
- Connection Type Code – **CONNEW**
- Contract Length – **24**
- Plan Value – **79**

11. Select/unselect any Value Added Services purchased by the customer and then press **“Finish”**.
12. You will be returned to the **“Point of Sale Entry”** screen and the customer you have just created will be displayed on the left hand side of the screen.
13. You will now have to add the iNcard stock code into the order. (12MTHINCARD or 24MTHINCARD)
14. The iNcard form will appear and you will need to complete it.
15. You can now click on **“PAY”** and select tender type **“CASH”**.
16. Print the docket as per normal.
17. Enter **“Q”** to quit the Point of Sale System.

Exercise 3A. Process a Refund

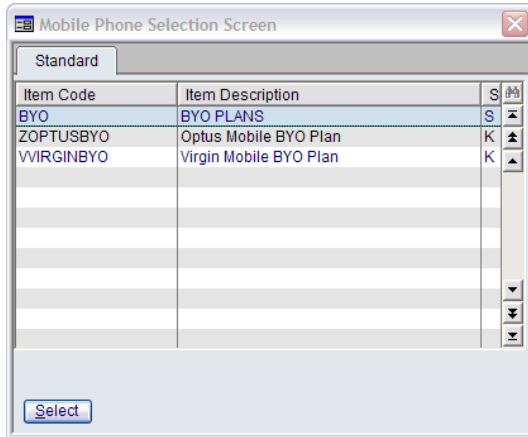
Assume that you have selected the wrong plan for the last activity. We need to process a refund in order to correct it. You will have to make sure you have the original sales order number.

1. Point of Sale Entry:
Book out Stock → Point of Sale Entry
2. Select **“Refund”** and enter the original order number on the next screen.
3. Confirm that the warehouse code is correct and press **“Enter”**
4. Select the Refund Option *“Produce credit note from part of the original invoice”*
This is Mandatory
5. Select the Edit Option on the appropriate item code, and **not** the kit code. Under the action option Enter R – Return to Item[s] to Stock or use the F2 Key
6. Select Finish and Confirm
7. For serialized stock enter the IMEI Number, and select **“Quit”**
8. Select Payment type as per Original Sales Order
9. Print the sales order

Process a Sale with no Hardware

Booking out BYO plans

As per normal book out stock procedure, however select “BYO”



Select the appropriate plan combination.

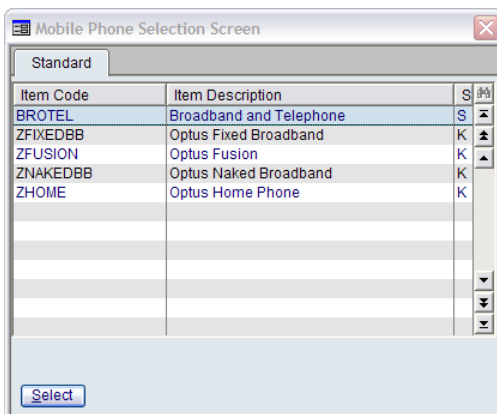
Booking out VAS only

As per normal book out stock procedure, however select “VAS”. Use the following plan combination:

- Plan Type Code – **VAS**
- Connection Type Code – **N**
- Contract Length – **N**
- Plan Value – **N**

Booking out Home Connection

As per normal book out stock procedure, however select “BROTEL”



Select the appropriate plan combination.

Process a Transfer Order

You will follow this process when transferring stock between warehouse codes in the same PRONTO system. You are processing a manual sales order using the "Transfer" type that will facilitate the movement of stock between warehouses without creating a GST Entry

Book out Stock → Transfer Stock out → Transfer Stock

1. Follow the menu path above and type in the "date of the transaction" or press "Enter" to accept today's date in the [Order Date] field. The full order entry screen will be displayed with the [Customer] field active
2. Select/Enter the Customer Account for the Store to Transfer To
**Customer account starts with "T" followed by the store warehouse number or dealer code and "01" behind. If a Customer account is not created do not proceed without one*
3. On Type enter "T" for Transfer
4. Enter the warehouse the stock is coming from
5. Enter the warehouse the stock is going to
6. Press "F4" to accept default values for the next fields and then Select "Lines"
7. Enter Item Code and Quantity (Record IMEI number/s if required)
8. Press "ESC" and then select "QUIT"
9. Enter the Customer Reference e.g. "TRF from Whse"
10. Enter on the Select Status screen. Make sure the Status is TI – Transfer to Update/Prt
11. Enter the Serial Number for serialized stock
12. Select Print Order and Finish
**Please note the transfer order needs to be update before you can receive it*

Receiving a Transfer Order

1. In PRONTO go to Book In Stock → Transfer Stock In → Receive Transfer Order
**This should be done by the receiving store*
2. Press "Enter" on "Transaction Date"
3. Press 'OK' to General Ledger warning.
4. Select "N" on the next screen. **DO NOT USE** stock transfer to release backorders.
5. Enter the Transfer Order Number
6. Press 'Enter' on edit order
7. Select 'OK'. Keep pressing 'Enter' until you are back at original screen.

Cancel a Sales Order

If for whatever reason a sales order needs to be cancelled, go to:

Book out Stock → Cancel Sales Order

1. Click on **“Find”**
2. Enter the Sales Order number
3. Press **“R”** or select **“Remove Order”**
4. Press **“Enter”** to confirm
5. You must specify a reason. Press F2 to list the available reasons
6. Select and then press **“Enter”**

Sales Order Update

The PRONTO system will automatically perform a sales order update every day after hours that processes all cash drawer transactions into the appropriate general ledger accounts.

This is important as you cannot refund a serialized product or run meaningful reports on the day’s transactions until this update has been performed.

As part of this activity, we are going to show you how to run this update manually, so that you can refund a serialized product same day or run sales related report.

Book out Stock → Update Sales Order

1. The [Update Selection] field is highlighted ready for your selection. It has defaulted to [S] which allows you select a set of order(s) you wish to update.
2. Select option **“S”**
3. The **“PRONTO Transaction Entry”** screen will be displayed with today’s date in the **“Transaction Date”** field. Press **“Enter”** to confirm today’s date.
4. Enter the Sales Order number in the **“Order”** field.
5. Select **“OK”** and the ‘Confirm Selection’ screen is displayed. Press **“Enter”** to accept the default of **“Y – Yes”** and the update process will begin.
6. The ‘Batch Control Totals’ screen will be displayed once the process is complete and will detail the transactions that have been processed. Continue to press **“Enter”** completed the Sales Order History process and then press **“Enter”** until you have been returned to the main screen.

Boomerang/DOA

This document describes the steps to be taken when selling a replacement handset to a customer as part of the Project Boomerang process. This process should be followed in dealing with Handsets which are either **ELF** (*Early Life Failure*) or **DOA** (*Dead on Arrival*).

This procedure is only undertaken once a handset is identified as defective and may require to be replaced. This process ensures that the handset is correctly remitted on the Optus hardware account.

For the successful implementation of this process the following is required.

- The original sale receipt of the handset being replaced.
- The phone being replaced must be in stock if not process a refund (Refer to the Customer Invoicing Process).
- Return faulty stock item back to the supplier in PRONTO via the Purchase Order module. Status of item should be "**Returned**", refer to "**Process a Refund**" Page 30.

Different suppliers have different requirements on how to process a return. All suppliers require a faulty handset report to be filled, and the return approved before processing in PRONTO.

Brightpoint requires any faulty handset not a NOKIA to be referred to the manufacturer.

To book out a replacement handset:

As per normal book out stock procedure, however select "DOA/ELF"

Use the following plan combination:

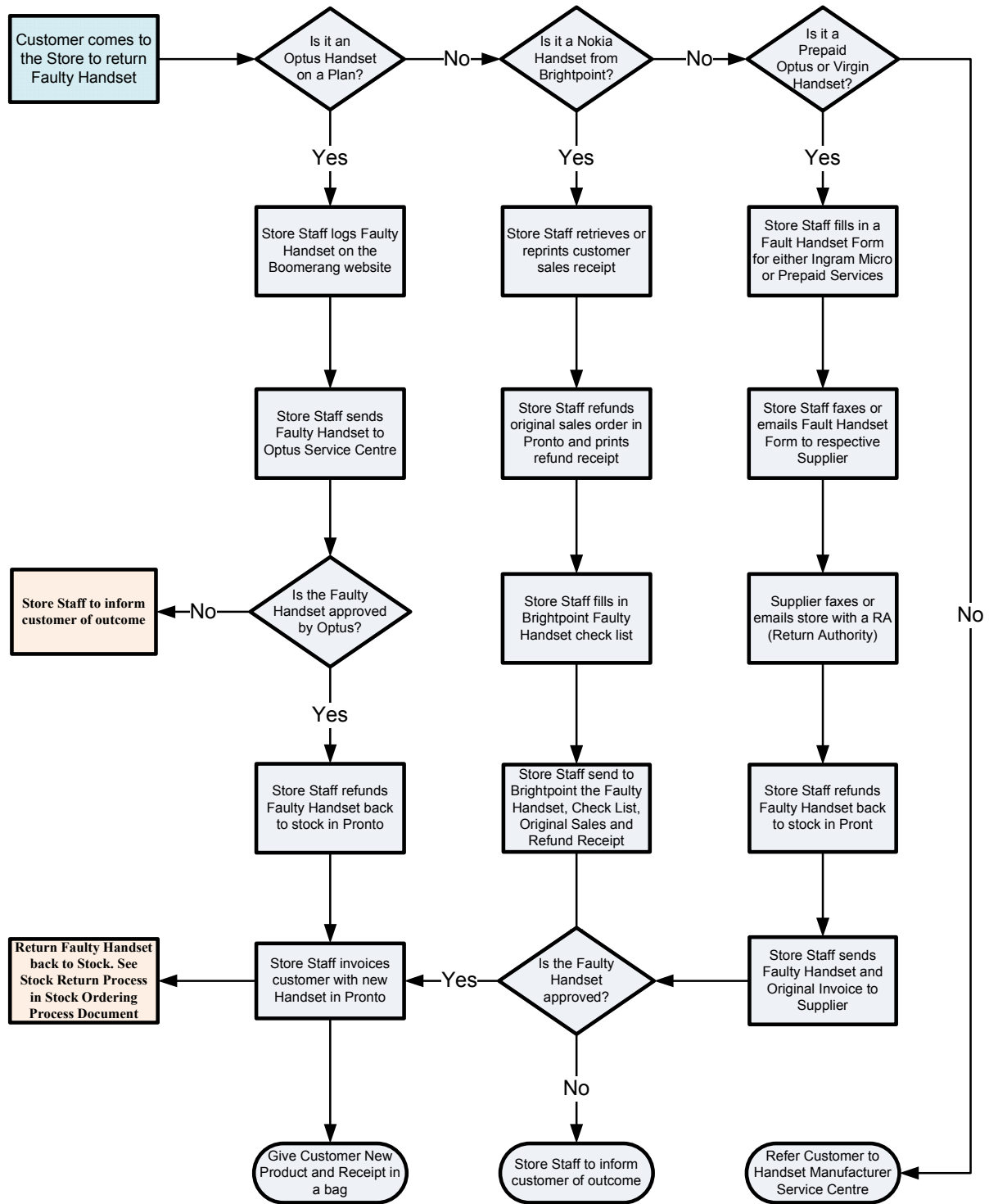
Plan Type Code – ELF

Connection Type Code – N

Contract Length – N

Plan Value – N

Boomerang Process Flow



Chapter 5

END OF DAY

Overview

In this chapter, we are going to show you the basic features of PRONTO's End of Day Process. The overall aim of this chapter is for TeleChoice team members to understand and operate the basic fundamentals of the PRONTO End of Day menu options.

Objectives

At the end of this chapter, you will have a clear understanding of:

- Generating a Cash Transaction Listing
- Amending incorrect tender types
- Closing the Cash Drawer
- Perform a Cash Drawer Reconciliation & Bank Pay in Slips

Introduction to End of Day Process

This document will show you PRONTO's End of Day Procedures. At the end of every day's trading there is a series of end of day procedures that need to be done. This includes closing down the cash drawer, generating some sales reports and reconciling the cash drawer transactions.

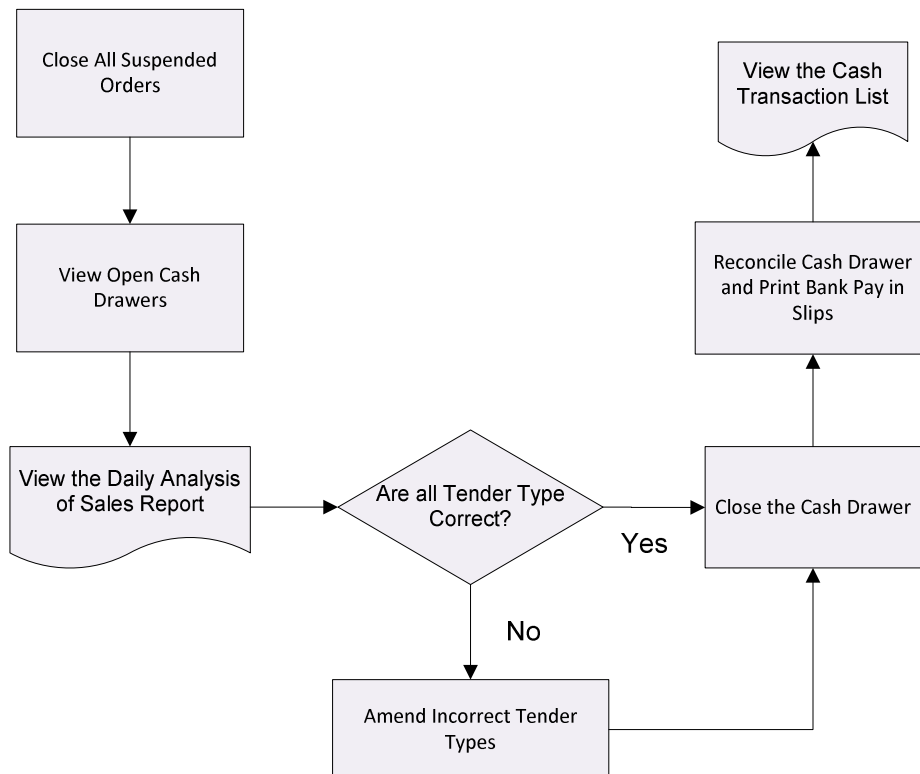
There are certain audit requirements relating to the cash management that need to be observed to reduce the threat of fraud.

- Appropriate separation of duties is required within the store. Cash should be counted by one team member matched to PRONTO daily by the store manager (with signature).
- The cash drawer must be closed and reconciled each day the store is trading.
- Incorrect tender types must be amended to match the actual tender taken.

- Cash transaction listings must be retained in store in accordance with your usual processes.
- Banking should be done each day and in the situation you cannot achieve this, you must bank each daily amount on separate deposit slips.
- Any variations between PRONTO and the actual amount banked must be recorded in the cash variations account (automatically posted in PRONTO once the cash drawer reconciliation is complete).

The Inventory Transaction Report should reconcile all the transactions for the day ensuring the IMEI numbers are attached to all handset Purchases, Sales or Transfer Orders. This will minimize stock Issues that may arise.

TeleChoice End of Day Procedure:



Suspended Sales Orders

Before you begin any End of Day processing, you must first close all SUSPENDED SALES. This is performed through the Point of Sale system.

To get a list of all suspended sales orders go to:

PRONTO → End of Day → Suspended Sales Order

1. Enter the starting warehouse number
2. Enter the ending warehouse number
**If only for 1 warehouse, the starting and ending warehouse will be the same*
3. Press Enter and then Spool + View Report

Resume Sales Orders

In POS, click on “End of Day” and then select “Resume Sale”. Find and select the order number that needs to be resumed.

View Open Cash Drawers

This function is to simply view all open cash drawers.

Amending Incorrect Tender Types

One of the reasons for generating the Cash Drawer Transaction listing is that it gives you a chance to check that all the sales transactions were entered with the correct tender type e.g. Cash, Cheque or Card.

If you realize the wrong tender type was used for any transaction, you need to fix this before moving to the next stage of the End of Day process.

In this section of the End of Day process, we will see how you go about selecting the transaction that was entered incorrectly and then amending the tender type.

End of Day → Amend Tender Types

1. Enter the Store ID and Cash Drawer number. Press F2 to show full list. The following screen will come up:

Drawer	Trans Date	Seq	Batch	Account	Ord...	Amount	Co...	Money Type
3130	25-SEP-2009	46	0000BQ	0411223344	454	-11.00	H	Cash
3130	25-SEP-2009	47	0000BQ	CASH3130	459	-10000.00	H	Cash
3130	25-SEP-2009	48	0000BQ	CASH3130	462	-499.00	T	EFTPOS
3130	25-SEP-2009	49	0000BQ	0422220000	466	-450.00	H	Cash
3130	25-SEP-2009	49	0000BQ	0422220000	466	0.90	H	Cash
3130	25-SEP-2009	50	0000BQ	CASH3130	469	-998.00	H	Cash
3130	25-SEP-2009	52	0000BQ	0411122233	471	-1499.00	T	EFTPOS
3130	25-SEP-2009	51	0000BQ	CASH3130	473	998.00	H	Cash
3130	25-SEP-2009	53	0000BQ	0411122233	477	600.00	H	Cash
3130	25-SEP-2009	54	0000BQ	0422220000	480	-43.00	H	Cash
3130	14-JAN-2010	55	0000BQ	YYZ2	582	-199.00	H	Cash
3130	10-MAR-2010	56	0000FC	YYZ6	597	-4.00	H	Cash

Select Trans Find End Selection Exit

2. Select the order number from the list and select **“Select Trans”** to flag the line with *
3. Select the **“End Selection”** button on the command line.

The Following screen will show up:

New Transactions		Amount to Allocate
Tender Type:	<input type="text"/>	11.00
Trans Amount:		
Cheque No:		
BSB No.:		
Payee:		
<input type="button" value="OK"/> <input type="button" value="Cancel"/>		

4. Select the new tender type. Press F2 to show full list.
5. Transaction Amount field defaults to the full value of the transaction.
** You only change this if you are amending only part of the transaction. Press the enter key to accept the total amount. The remaining fields on the screen are specific to the transaction type. If you were changing to a card payment type, you would need to enter the card number. If you were changing to a cash type, you would not have to complete the fields at all.*
6. Press the **“Enter”** key to accept the default **“Y”**.
7. Press the **“Enter”** key to accept the default **“N”**.

Daily Analysis of Sales Report

This report lists sales according to Group/Class, Item Code, Sales Representative or Summary. The key element of this report is selection of archived sales because once sales are updated they are archived.

To run the Sales Report:

PRONTO → End of Day → Daily Analysis of Sales

** Other than the filters specified below, leave everything as default unless necessary.*

1. Report Sequence: Select either Class/Group (recommended) or Item Code. The selection type is **C** (Class) or **P** (Item Code)
2. Date Type: Select Today or Yesterday or Week or Month or Period or Entered (recommended)
3. Type of Sales: Enter D (Delivered)
4. Search Archive? Enter Y for Yes
5. Value Inc or Exc. Tax: Enter E to Exclude GST
6. Start Date: Enter Starting Date Range
7. End Date: Enter Ending Date Range
8. Start Item Code: Enter Starting Item Code Range
9. End Item Code: Enter Ending Item Code Range
10. Start Item Group: Enter Starting Item Group Range
11. End Item Group: Enter Ending Item Group Range

Closing the Cash Drawer

Prior to clearing the cash drawer fund and posting the funds to the PRONTO bank account, you need to close the cash drawer.

Point of Sale → End of Day → Close Cash Drawer



Enter the Store ID number and then click **“OK”**. The cash drawer will be closed for reconciliation and posting

3. The cursor moves straight to the Actual field. PRONTO has automatically entered balances for all the transaction types. It then takes the cash balance, adds in the cash drawer float, and calculates what the balance should be.
4. Type the first tender type balance into the Actual Balance field. If this amount is different from the calculated balance, PRONTO will calculate the Cash Adjustment amount.
5. Press F2 on "Type" and select Cash Float Adjustment
6. Enter comments and press the enter key to accept the amount. PRONTO calculates any variation and places a value in the adjustment field.
7. Continue the same process for all tender types until all balances have been entered into this table.
8. Click or press the Reconcile button from the command line to return to the 'Cash Drawer Reconciliation' screen.
9. Click or press the Post button on the command line.
10. Click or press the Select button on the command line
11. Click or press the OK button.

12. Enter Report Sequence of [E] and accept all other defaults. PRONTO prints out pay in slip and Receipts Audit Report.

Cash Transaction Listing

To run a Cash Transaction Listing, follow the procedure below. Once you have run the report, PRONTO will allow you to view it on the screen or view the report and then print it out.

End of Day → Cash Drawer Transaction List

1. Select **"N"** as the print narrow.
2. Select **"T"** as the transaction type.
3. Press **"Enter"** and in the Start Drawer field, enter warehouse number
4. Enter the same warehouse number in End Drawer field.
5. Press **"Enter"** twice.
6. Start Date and End Date should be the today's date.
7. Keep Pressing **"Enter"** until the end.
8. Processing Option window will come up.
9. Press **"Enter"** to generate report and once the report has finished spooling; the XML PRONTO Report Viewer will automatically open on your screen with the report displayed.

Chapter 6

STOCK MANAGEMENT

Overview

In this chapter we are going to show you the basic features of PRONTO's inventory system. The overall aim of this chapter is for TeleChoice team members to understand and operate the basic fundamentals of the PRONTO Inventory System.

Objectives

At the end of this chapter, participants will have the opportunity to:

- Change Serial Number of an Item
- Change The Retail Price of an Item
- Enquire Stock on Hand for an Item Code
- Warehouse on Hand Report
- Warehouse on Hand Report (IMEI)

Introduction to Inventory Management

The Inventory module includes sales, purchasing, distribution stock control and individual store management and is fully integrated with PRONTO financial systems. Some features of the inventory system:

- Supports weighted average, last and actual costing.
- Different levels of pricing for each stock item, plus the possibility of using special prices and promotional pricing.
- Stock movements can be fully tracked from the time an internal order has been raised until after the goods have been sold.
- Purchase orders can be tracked for all suppliers.
- The status of the order is maintained and can be used for reporting or enquiry purposes.

Inventory Enquiry (IMEI)

Stock Management → Inventory Enquiry

1. Enter “0” and then press “Enter”
2. Select “F” and then enter the IMEI number to search for it.
3. Press “T” or select “Trace” to view the history of the IMEI
4. Select “Detail” to drill down to look at more details.

Enquire Stock on Hand for an Item Code

Stock Management → Enquire Stock Item

1. Enter the stock code or find the item code by using the F2 function
2. Select “Supplier” to view supplier and cost details.
3. Select “Prices” to view RRP selling price.
4. Click or Press the Enter key on the “Whse” button and select the warehouse
5. Select “Movements” to view item movements.
6. Click or Press the Enter key on the “Serials” button
7. View serials for item code
8. Select “Convert” to change a serial number.

Warehouse on Hand Report

Stock Management → Warehouse on Hand Report

1. Use the options above.
2. Change the Start Warehouse Number and End Warehouse Number
3. View report or export to MS Excel

Warehouse on Hand Report (IMEI)

Stock Management → Warehouse on Hand Report – IMEIs in Stock Report.

1. Enter the Start Warehouse Number and End Warehouse Number
2. View report or export to MS Excel

Stocktake

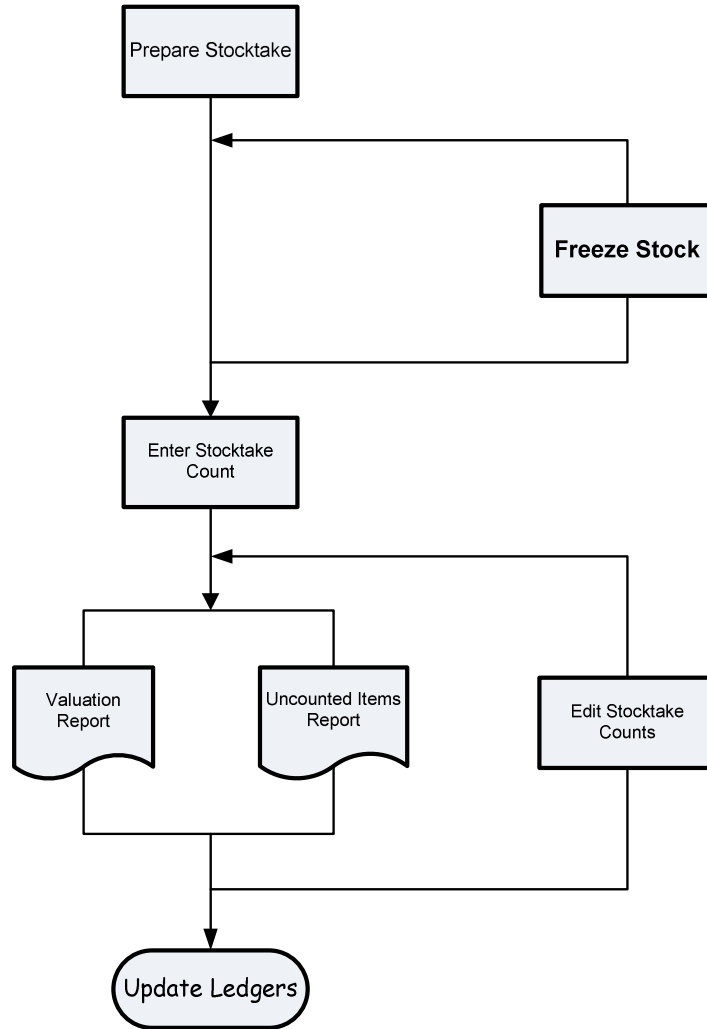
A stocktake is a periodic physical count of stock items in the warehouse to make sure levels recorded in the PRONTO Stock System agree with the physical stock levels. You should also find any damaged stock in need of repair or replacement during your stocktake.

PRONTO uses the following process to simplify and ensure the accuracy of the stocktake.

- I. Prepare for stocktake
- II. Freeze stock for stocktake
- III. Count the physical stock
- IV. Record stock counts
- V. Print reports and check count
- VI. Correct count discrepancies
- VII. Update stock ledger

The difference between the 'frozen' stock level and the physical count is applied to the current stock level to update the warehouse stock on hand.

PRONTO Stocktake Process Flow



Prepare Stocktake

Stock Management → Stocktake Process → Prepare Stocktake

1. Press enter to create a new stocktake control number.
2. Apply necessary filters such as: Item Code, Item Group Code.
** If a filter is selected, you are performing stocktake for only those items.
 For e.g. Item group code W007 is for handsets only.*
3. Enter the warehouse number.
4. Leave everything as default except for these fields:
 Freeze Date – **“Current Date”**
 Show Warehouse Stock on Sheets – **“Y”**
 Incl Non-Moving Items w/zero OH Bal – **“N”**
5. Print the Stocktake Sheet and perform stock count.

Enter Stocktake Counts

Stock Management → Stocktake Process → Enter Stocktake Counts

1. Enter the stocktake Control number.
2. Select **“Y”** to accept default parameters.
3. Accept the default code **“N”** for Enter using Multi Units.
4. Select **“M”** for Manual in Stock & Loc Order.
5. Press **“Enter”** to proceed.
6. Enter all item codes on the Stock Sheet one by one.
7. If there’s a difference between warehouse stock and physical stock, remove (Lost) or add (Found) IMEIs accordingly.
8. Once finished entering all stock count, press **“ESC”** to exit.

Differences Report

Stock Management → Stocktake Process → Differences Report

1. Enter the stocktake Control number.
2. Select “Y” to accept default parameters.
3. Leave everything as default except for these fields:
 All Items Counted – “Y”
 Print Variances Only – “Y”
 Print Extended item Description – “Y”

Update Ledger

Stock Management → Stocktake Process → GL Update Inventory Ledger

1. Enter the stocktake Control number.
2. Select “Y” to accept default parameters.
3. Enter the Stocktake counter’s name.
4. Enter the Stocktake checker/supervisor’s name.
5. Accept all other defaults and update ledger.

Chapter 7

FAQs

I am trying to book out a handset but this error message comes up “Not enough Qty on hand” when the IMEI is actually “In Stock”. What does that mean?

Most of the time, even though the IMEI is “In Stock”, it is committed to a sales order. The reason for this could be:

- You have already done a sales order on this IMEI and forgot about it
- You are in the middle of the sales order and PRONTO timed out

The best solution is to do an IMEI query:

1. Stock Management → Inventory Enquiry
2. Type “0” Enter
3. Select “Find” and enter the IMEI number and then press “Enter”
4. You have to make sure that the status is “In stock”.
5. Press “T” or select “Trace”
6. Check to make sure there is no sales order attached to the IMEI already.
7. Note down the sales order number and cancel it

I am in the middle of a sale and PRONTO timed out, now I can’t access the sales order?

When PRONTO timed out in the middle of a sale, the status of the sales order will become “Being Entered”. When this happens you won’t be able to access the sales order.

The available solutions are

1. Wait overnight, the next day the sales order will become “Suspended”, you will then be able to resume it in POS
2. Note down the sales order number and cancel it, you will be able to start a new order straight away. Refer to “**Cancel a Sales Order**” on page 32.

When enquiring for an IMEI, the status is “Received Stock”. What should I do?

To make sure that this does not happen, when booking in stock, confirm that the Qty Rec’d is the number of serials you have entered. This happens when: for e.g. Qty Rec’d is 0 but somehow you have entered 2 serial numbers.

The solution is to email PRONTO so the IMEI can be moved to the back order and received properly.

The purchase order I am trying to access is locked, how do I fix it?

Refer to “**Release Update Lock on a Purchase Order**” on page 14 to unlock the purchase order

I have just done a refund on a phone, now I am trying to book it out correctly but I can't. How come the handset is not in stock?

All sales order will be updated overnight. If you wait until the next day, your handset will become “In Stock” and then you will be able to re-book it out. The other solution is to do a manual update – refer to “**Sales Order Update**” on page 33 to do this.

I am trying to create an order for accessories but I can't find the item code. What should I do?

Depending on how efficient the supplier is, you might receive the product information before the PRONTO team. Please use the “New Product Codes Form” to request for the item code to be created in PRONTO (Send via email). Please provide all information including:

- The Supplier
- The Item Code
- Item Description
- APN/Barcode
- Cost ex GST
- RRP

I have received some stocks and updated it. I have realised I did a mistake. Can you please help me rectify the error?

When a purchase order has been updated, generally nothing can be done to it, not even the PRONTO team could do anything. The solution is to do a purchase order return and then re-book it in properly.

Why is there a “!” behind the serial number of a handset?

That means the serial number had been entered previously. Do an IMEI query to find out about the existing serial number. Refer to “**Inventory Enquiry (IMEI)**” on page 45.

I have received some handsets under the incorrect item code. How do we fix it?

Fortunately, this kind of issue can be fixed quite easily. However this can be done by a store manager or someone authorized within a store.

I am trying to print and my printer is not working. Can you please help?

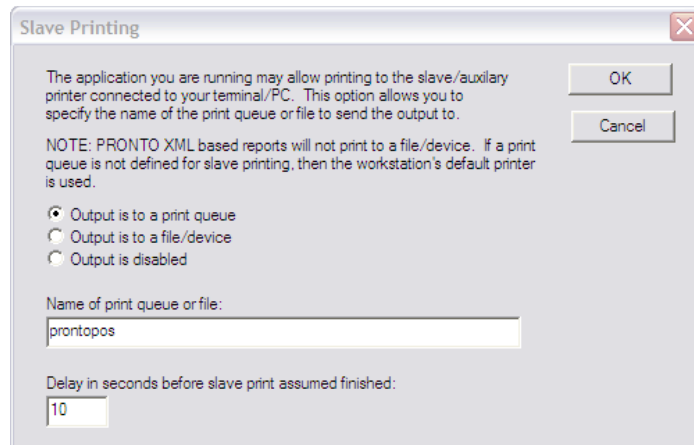
Generally, a store will have two printers. They are referred to as the “Docket Printer” and “Normal A4 Printer”. All cash sales or when trying to reprint a cash sale receipt (i.e. Customer = CASHXXXX), please use the computer connected to the docket printer.

This is the slave printing set-up for the computer connected to the docket printer:

In PRONTO

File → Settings → Printing

The setup should look like this:



When trying to print for all other customer please use any other computer.

This is the slave printing set-up for the computers not connected to the docket printer.

In PRONTO

File → Settings → Printing

The setup should look like this:

