SALES ORGANIZER

Tutorials

Before using Sales Organizer, these tutorials are recommanded. You will have an overview of the different characteristics of this billing system. Do not hesitate to redo the tutorials to help you to memorize Sales Organizer's multiple functions.

These exercises are an initiation to Sales Organizer. You will familiarize yourself on a daily use.

Print this document. You will need it to accomplish these exercises. If you don't have a registered copy of Sales Organizer, you will get a message printed on each invoice. During the tutorials, always print an invoice when it is requested. The "Meter" data base is used to keep data bases synchronized. You may see it but **don't add or delete files**.

Please install FileMaker Pro before running Sales Organizer. Visit **http:/go.to/gestabusiness** if you don't have FileMaker Pro. You will find a link to get a demo of FileMaker Pro. Then, try Sales Organizer.

Good work!

First exercise

Launch Sales Organizer by double-clicking on the Sales Organizer's icon. It will start FileMaker Pro. Not long after, Sales Organizer's logo and its main menu are displayed.

Click on “Visit - Help”

A flow chart is displayed on screen. There is a lot of information accessible in this data base. Click on “Inventory”. You see comments in the green boxes. It is similar with most data bases. Click on this icon to come back to the flow chart.

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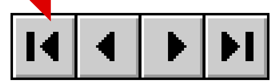
Click on  to return to the main menu.



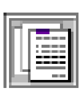
To return to the first file.

To return to the previous file.

To go to the next file.

To go to the last file.

Click on “Fax” in Sales Organizer's main menu.

Click on  to send a fax. You will find this icon in several places in Sales Organizer. You can produce accurate reports from your sales.

Click on  to return to the beginning.

Click on  to rapidly obtain information about data base opened on screen.

Second exercise

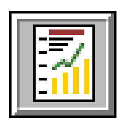
You will add a new product to the current inventory.

In Sales Organizer's main menu, click on "Inventory". To create a new file, click on 

Fill in the following information. To change fields, use the "Tab" key.

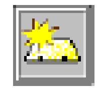
Supplier Code: WS23
Department Code: Stapler
Product Code: 105
Description: Mitch Stapler
Initial Stock: 18
Cost Price: 2.56
Sale Price: 11.95

You have probably noticed that the date appears automaticaly and the cursor has not stopped in the "Qty avail. O.H." field. You will not be able to modify its field because it is doing a mathematical operation.

To return to Sales Organizer's main menu, click on 

Third execise

You will produce an invoice with an outstanding balance.

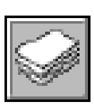
In Sales Organizer's main menu, click on "Invoicing". Click on  to create a new invoice. Have you noticed a brief delay before opening this new invoice? Sales Organizer actually opened five data bases in the background. At the same time, it created a file having the same invoice code in these five data bases.

To go from one field to an other, use the "**<u>Tab</u>**" key.

First, choose the salesperson doing the sale. And "Visa" for payment mode. Type this following phone number: 461-3390-2081. Choose "Mr" for mister. Press on "Tab" to go to product code.

Click on the product which has the number 31160. Enter "2" for quantity. Click on the product which has the number 31154. Enter "2" for quantity. Press on "Tab" to go to "Transaction". Check the box "Down payment". Your client will pay in part the amount to be paid. Check the box "Taxable".

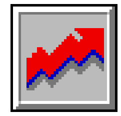
Enter "40" in the fields "Visa" and "Money Received". In "Balance", you should have an amount of 23.35$. Click on "Print". It is necessary. You'll see later. Click on "Cash Report" to verify if the 23.35 amount have been registered. Click on "Daily Report". You should see the amount of 54.82 in "Sales before taxes" and 40.00 in "Visa".

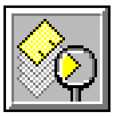
Click on  to return to the "Invoicing" data base.

<u>Tomorrow, complete exercise 4</u> (Today's date must be different).

Fourth exercise

You will clear off Mr. David Reynolds' outstanding balance. First, you have to erase the balance appearing on Mr. Reynolds' first invoice.

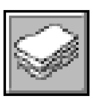
In Sales Organizer's main menu, click on "Invoicing". Click on  to open "Sales".

Click on  to find Mr. Reynolds' invoice. When Sales Organizer operates for several months, the "Invoicing" data base holds twousands of invoices. This is the reason why you have to search the client by his or her phone number.

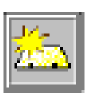
Enter Mr. Reynolds' phone number. Click on 

to obtain all Mr. Reynolds' invoices. On the same line as Mr. Reynolds' invoice, enter 23.35 in the "Discharge" field. You will notice that the "Current Balance" is now zero.

If you know the invoice number, you could enter this number directly in "Invoice Code"

Click on  to return to the invoice.

Secondly, you will create a new invoice to cash the amount paid.

Click on  to cash the outstanding balance of 23.35. Redo the same steps concerning the salesperson and enter the customer's phone number. Using the "Tab" key, go to the "Transaction" field. Click on "Invoice payment" and "Non-taxable". Taxes have been already charged with the down payment. Enter 23.35 in the "Check" and "Money Received" fields.

Click on "Print" (it is essential).

Click on "Sales Organizer", "Book keeping" and "Overdue 30" to verify if the amount of 23.35 does not appear on Mr. Reynolds' invoice.

Click on “Sales Organizer” and go to “Cash Report” to see if 23.35 has been recorded. Click on “Daily Report”. You should see the amount of 23.35 in “Check” and “Sales before taxes”. If so, it means that your data bases are synchronized and every thing is alright!

> Once in a while, let’s clean it up! The data bases “Overdue 30, 60 and 90” through time accumulate copies of invoices already produced. You can delete these invoices when there are no longer useful. This does not affect the “Invoicing” data base.

Sales Organizer is a P.O.S. that takes care of the “Customer” data base. Each time, you click the “Print” button, it updates the base. If it’s a new customer, Sales Organizer creates a new files. You will notice that there is no “New” button in this base. All new customers must be enter via the “Invoice” data base. Do not create new customers in the “Customer” data base. Sales Organizer won’t be able to find out duplicates. Let it work for you! However, you can import customers from another data base.

Fifth exercise

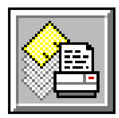
You will produce a cash report.

Click on  in the "Invoicing" data base.

Click on "Come in". In Sales Organizer's full version, the "Come in" button limits access to autorized personnel only.

In the layout "Report". Click on 

to obtain the daily sales report. It is the same for any other period of sales report.

If you've bought Sales Organizer, click on  . If not, skip to the next step. Here, do not click on the print button if you have a demo version.

Before quitting the "Cash Report", you have to verify if what you really have in your hand is equivalent to what you have on screen.

Go back to the "Invoice" data base. Click on "New". Fill in the new invoice. Enter in "Cash" the amount displayed in the "Amount Due" field. Enter an amount greater in "Money Received" than the amount displayed in "Cash". You see an amount in "Change". It is the amount of money that you should remit to the customer. Sales Organizer helps you to calculate the change. Click on "Print".

Go back to the "Cash Report" data base. Click on "Daily Report". Enter "250" in the "Money at opening" field. It is the amount of money in your cash register before opening. To find out the amount in the "Money at closing" field, add the amount in "Total Cash Money" to the amount in "Money at opening". Now, your "cash deficit" and "cash surplus" should equal zero. If it is the case, click on "Sales Organizer" to quit the "Cash Report".

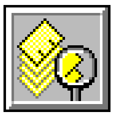
Sixth exercise

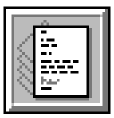
You will be searching for customers with 30 days overdue amounts

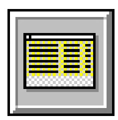
Click on “Book keeping” in Sales Organizer’s main menu, then on “Overdue 30”.

Click on 

to get all invoices with an outstanding balance of 30 days or more. If you obtain on screen, a message similar to “no file found” then just click “Continue”.

Click on  to bring all invoices back on screen.

Click on  to send a letter to the customer concerning a 30 day overdue account. Before executing, make sure you have selected your customer’s file.

To go back to the previous layout, click on 

Click on 

Seventh exercise

You will analyse some business statistics.

Click on “Statistics” in Sales Organizer’s main menu.

Click on  Weekly Report to find the revenue, value of products sold at cost price and the profit margin.

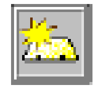
You could also produce a report about your sales. This report is produced for the current month or for the last month. It shows all your sales for each department of your retail store.

Now, you have few information available. Click on “Sales of the month”. You’ll see a report on screen. For each department, one page will be displayed. Click on the note pad to the left to see the other departments. Then, click on “Continue” to go back to the starting page.

In the full version, Sales Organizer prints the report displayed on screen.

Eighth exercise

You will produce an invoice for a customer buying a gift certificate.

Click on “Invoicing” in Sales Organizer’s main menu. Click on  to create a new file (invoice).

First, choose the salesperson Enter this phone number 450-450-2000. Select “Mr” for mister.

Enter the following information in the appropriate fields.
Enter → “charles brown” in the “Name” field.
Enter → “1230 anywhere” in the “Address” field.
In the menu, choose → “Smooth Rock” in the “City” field.
In the menu, choose → “Colorado” in the “State” field.
Enter → “14590” in the “Zip Code” field.
Enter → “chlebrown@netroof.com” in the “Email” field.

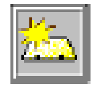
As you can see, the capital letters appear automatically.

Click on “Tab” key and go to “Transaction” Check the box beside “Certificate”. Move the cursor to “Money Received”. Enter the amount “50” in this field. Do the same in “Amount paid”? Did you forget to check the box “Taxable”? Did you forget to click on “Print”?

Every time you’re done, you have to print the invoice. By printing, Sales Organizer transfers all the new customer’s information in the “Customer” data base. It checks out duplicate customer records and gets rid of them if so.

Ninth exercise

You will produce an invoice for a customer using a gift certificate.

Click on “Invoicing” in Sales Organizer’s main menu. Click on  to create a new file (invoice).

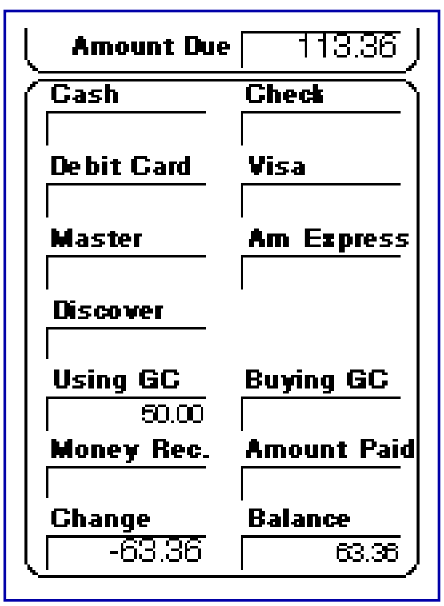
Go through the usual steps to enter the customer’s information. Choose in “Product Code” the items which will have a value after taxes exceeding 50$.

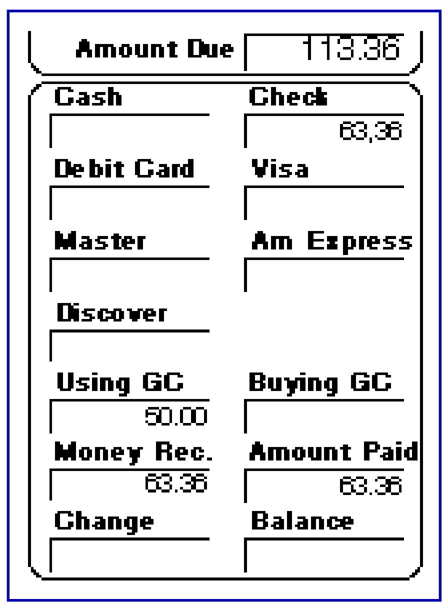
Check the box “Taxable”. The customer’s gift certificate has a value of 50$. Enter “50” in the “Using GC” field. When you quit the field, the amount of 50$ will reduce the amount in the “Amount Due” field. You ask the customer to pay the amount found in the “Balance” field. Enter this amount in the “Money Received” and “Amount Paid” fields.

> In this kind of purchase, the client may use a lay-away plan. If so, check off the "Down payment" box under the "Transaction" heading.

In this example, the customer bought goods for a value of 113.36$. By using his 50$ gift certificate, there is a balance of 63.36$. The user enters this amount in “Amount Paid” to clear off the “Balance” and the “Change” fields.

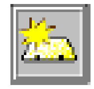
Example **Before** **After**





Tenth exercise

You will produce an invoice for a refund.

Click on “Invoicing” in Sales Organizer’s main menu. Click on  to create a new file (invoice).

Go through the usual steps to enter the customer’s information. In “Product Code”, find and select the returned item. In “Qty”, enter a negative number (-1). Check the box “Taxable”. You should obtain a negative amount in “Amount due”. Enter this negative amount in “Amount paid”. Use the same payment mode that the customer used when he bought the product.

> When you enter a negative number in “Qty”, you are adding a product in the inventory. It also reduces the amount of money in the cash report.

Well done!

Sales Organizer is an easy to use product. It can also be modifed to suit your needs. It’s up to you to make it reality.

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