

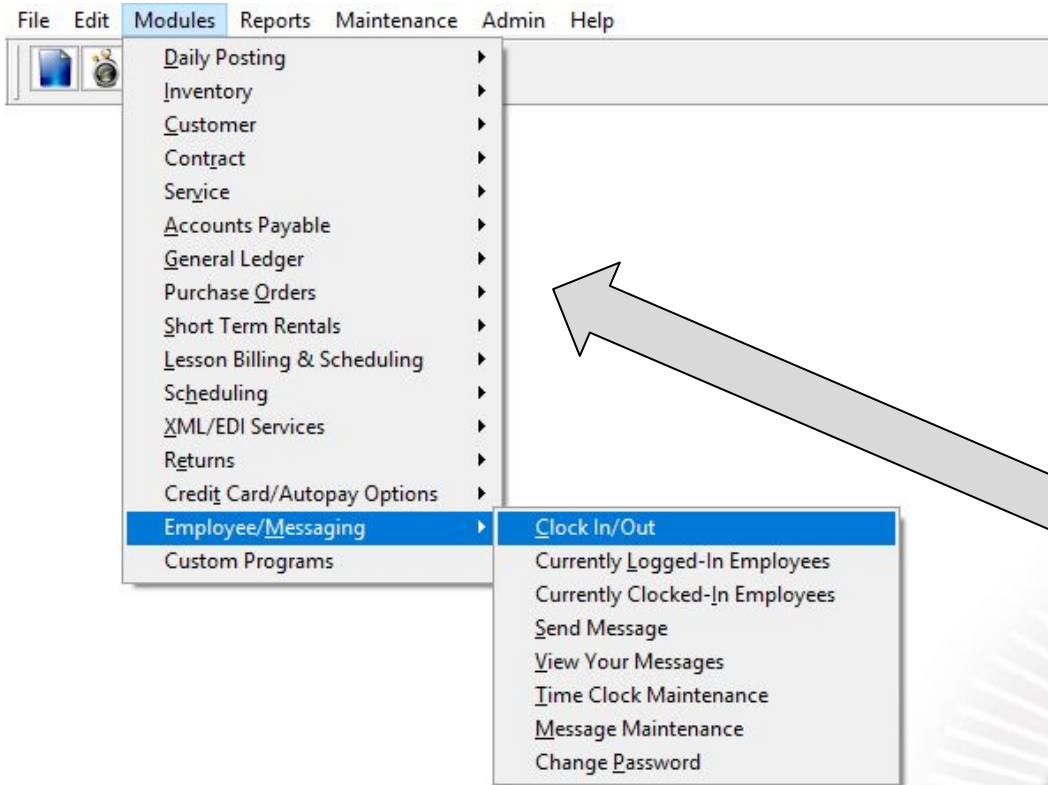
# Training Level 1

**By Ernie Aguirre & Ariel Hartzman**

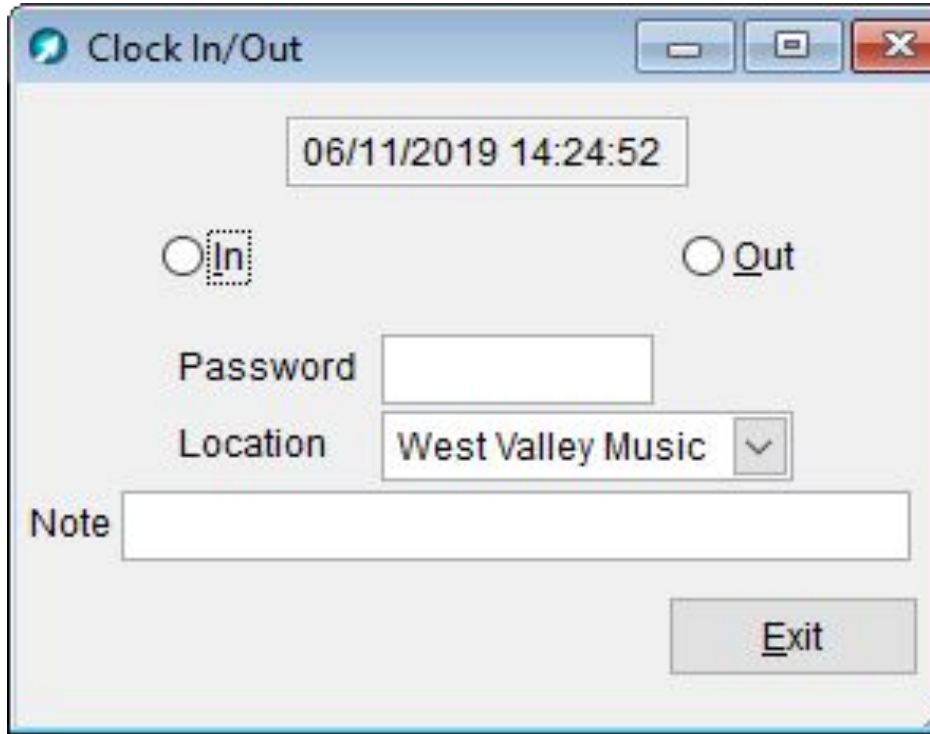
## Clocking In

Now that you officially work at West Valley Music, it's time to learn your first skill—clocking in!

At any computer in the storefront, follow these steps:



First, go to  
**Modules>Employee/Messaging  
>Clock In/Out**



The image shows a screenshot of a software window titled "Clock In/Out". The window has a standard Windows-style title bar with minimize, maximize, and close buttons. Inside the window, at the top, is a text box displaying the date and time "06/11/2019 14:24:52". Below this, there are two radio buttons: the first is labeled "In" and is selected (indicated by a small square next to it), and the second is labeled "Out". Underneath the radio buttons, there is a "Password" label followed by an empty text input field. Below the password field is a "Location" label followed by a dropdown menu currently showing "West Valley Music" with a downward arrow. At the bottom left, there is a "Note" label followed by a large, empty text area. At the bottom right, there is an "Exit" button.

You'll see this box on the screen. Select **In** or **Out**, then enter your password. (Your trainer will provide you with your password.)

If you need to correct any past time punches or add off-site work, leave a note in the **Note** box.

# Store Tour!

Now your trainer will give you a general tour of the store. Don't worry about memorizing too much for now—we will go into more detail later in the training program.

**Now that we're back...**

...it's time to learn an important, everyday task:

**Ringling up a sale!**



When a customer comes to the counter wanting to check out, it's time to open a new sale.



To open a sale on AMSI, first press the **Alt** and **Q** keys simultaneously.

**Sales Invoice**

Customer: Cash Sale Loc: West Valley Music Empl: DEFAULT Date: 06/11/2019  
 Ship To: Tax: Santa Clara County Term: 0 Ref#: 974803  
 Bill To: Cash Sale Expt: PO:

Qty: 1.00 Sku#/Serial#: Cat: Desc:

Price Ea: 0.00 Extended: 0.00 Discount: 0.00 Total: 0.00

Qty	Sku#	Description	Price Ea	Discount	Total	T

Total: 0.00  
 Collect: 0.00

☐ Loyalty Exempt  
☐ Gift Receipt ☐ Suspend Sale ☐ Stay in Quick Sale

A sales window will open. Make sure that the **Sku#/Serial#** box is selected, then use the scanner gun to scan the item into the sale. After you scan an item, hit the **ENTER** key until the product appears listed in the large box below.





After you've rung up all the customer's items, press the **F12** key to proceed to the payment collecting window.

Now that you have the final sale window open, finish the transaction with these steps:

1) In the **Pymt Method** box, select the way the customer is paying. If they are paying by credit/debit card, select **Offline CC**. (We accept everything except American Express).

Transaction	Orig Amt	Balance
Sales Invoice	16.67	0.00

**Total Due: \$16.67**  
**Balance: \$0.00**

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Pymt Amount:   
Pymt Method:   
Pymt Reference:

☐ Apply a Credit  
Invoice #:   
Orig Amount:   
Amt to Apply:

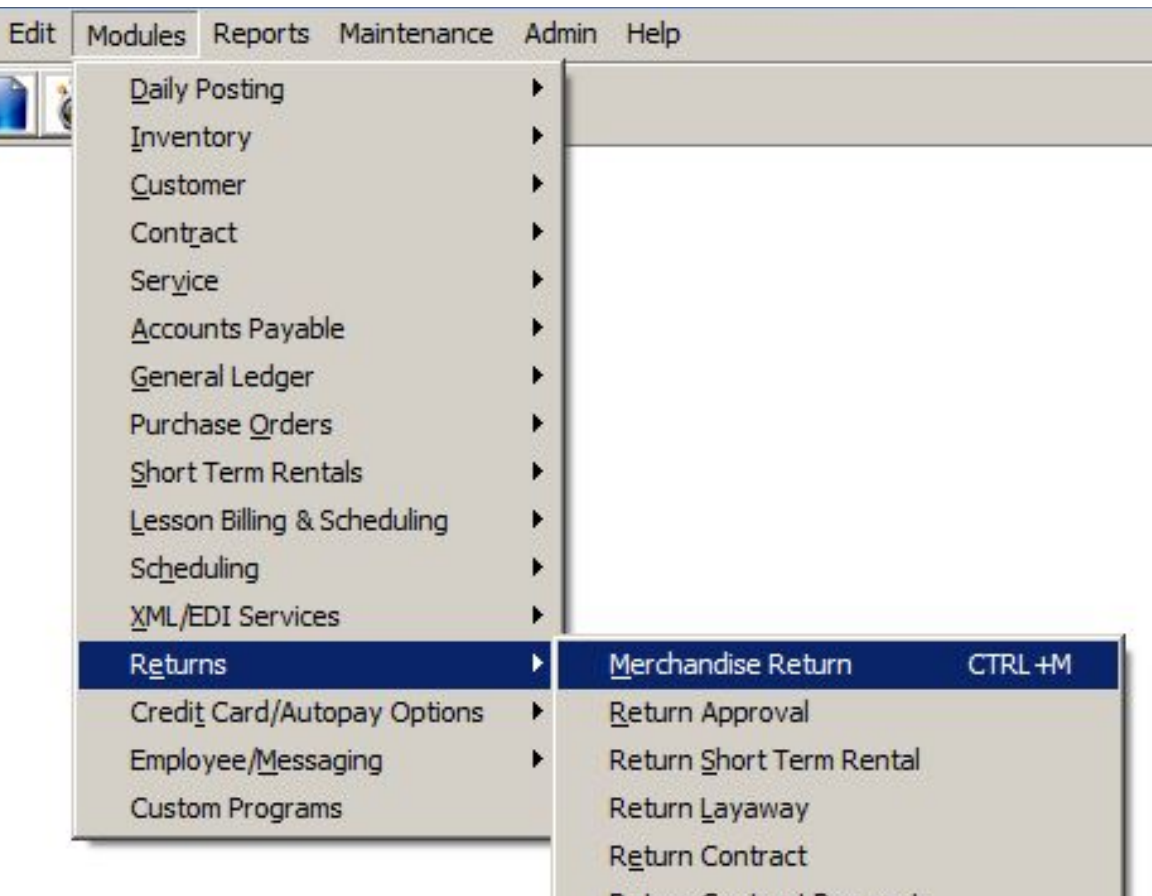
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Pay Type	Amount	Reference #
Offline CC	16.67	

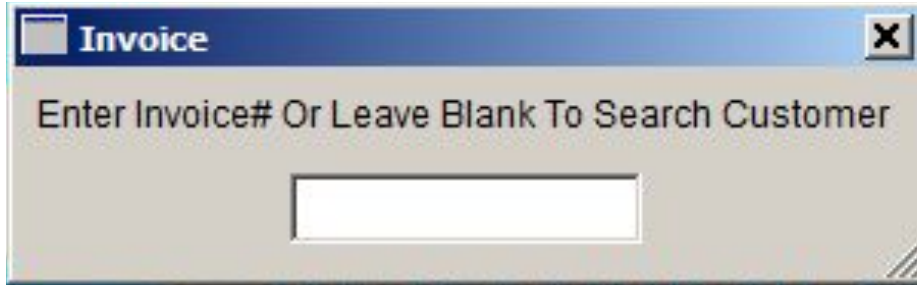
2) If the customer is paying in cash, enter the exact amount they give you in the **Pymt Amount** box. Then, select **Cash** in the Pymt Method drop-down menu, and hit **ENTER** until you reach the **Post** button.

# Returns

Sometimes customers have to return an item that they've purchased from us. Learning how to do a basic [Merchandise Return](#) is very easy. First, make sure the items are in new condition, and that the original packaging is intact. Then, follow these steps:



To start a return, go to  
**Modules>Returns>**  
**Merchandise Return**  
then hit **ENTER**.

A screenshot of a software dialog box titled "Invoice". The title bar is blue with a white "x" button on the right. The main area has a light gray background. It contains the text "Enter Invoice# Or Leave Blank To Search Customer" in a black sans-serif font. Below this text is a white rectangular text input field with a thin black border. The bottom right corner of the dialog box has a small gray triangle icon.

Invoice

Enter Invoice# Or Leave Blank To Search Customer

When this box appears, type the invoice number—found on the customer's receipt—to bring up the full invoice.

**Merchandise Return**

☐ Search By Sku    Search Sku/Serial    Location: West Valley Music    Ref#: 962150  
☐ Search By Invoice    Tax: Santa Clara County    Date: 02/07/2019  
☒ Show All Items    Insert Item    12233    Bal.: 58.59

Date	Ref#	Qty	SKU/Serial	Description	Price Ea	Disc Ea	Qty Ret.	Return Amt
02/07/2019	962131	1.00	VDJARSR2735	Vandoren Java Red #3.5 TS Re	25.00	0.00	0.000	0.00
02/07/2019	962131	1.00	RCB1025	Rico Royal Cl #2.5 (10)	17.30	0.00	0.000	0.00
02/07/2019	962117	1.00	I0718	Madrega Ocarina	14.95	0.00	0.000	0.00
02/06/2019	962071	1.00	HL50260370	Selected Sonatinas Bk.1	7.95	0.00	0.000	0.00
02/06/2019	962063	1.00	32107	Star Wars 1-V1/Alto	14.99	0.00	0.000	0.00
02/06/2019	962031	1.00	TCT02	Celebrate Theory Lv.2	17.95	0.00	0.000	0.00
02/06/2019	962031	1.00	TCT01	RCM: Celebrate Theory/Lv.1	15.95	0.00	0.000	0.00
02/06/2019	961996	1.00	EZ-4A	Everest 3/4-4/4 Shoulder Rest	17.95	0.00	0.000	0.00
02/05/2019	961973	1.00	RCL5	Rico Cl Reeds (5-pack)	6.95	0.00	0.000	0.00
02/05/2019	961950	2.00	HL00210096	West Valley Manuscript Paper - :	3.75	0.00	0.000	0.00
02/05/2019	961950	1.00	HL00210096	West Valley Manuscript Paper - :	3.75	0.00	0.000	0.00
02/05/2019	961927	1.00	A10780	Music Theory Practice Papers 2l	5.75	0.00	0.000	0.00

☒ All    ☐ Accessories/Serialized    ☐ Titles    ☐ Non Inventory

Type	Date	Amount
Offline CC	02/07/2019	46.11

Subtotal: 0.00    Restock Fee: 0.00  
 Tax: 0.00    Restock Tax: 0.00  
 Total: 0.00    Total Return: 0.00

Save    Cancel    ☐ Auto Reduce Balance    Scan Item:

Select the items that the customer is trying to return. After selecting all the items the customer is returning, press **F12**, then finish the transaction just like you would a normal sale.

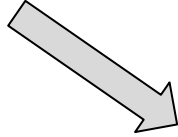
(If they had purchased multiples of the same item but aren't returning all of them, you can adjust the number they are returning under the **Qty Ret.** column.)

## Answering the Phone

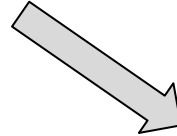
Oftentimes customers will call the store to ask questions before coming in person. This is a great opportunity to build their confidence in us and earn their business.

We answer the phone the same way every time to ensure that every customer gets the best interaction possible. Open with this simple dialogue when you answer a call!

Hello, West Valley Music.



This is (insert name).



How can I help you?

Be sure to introduce yourself to establish a basis of connection with the customer. Then, ask “How can I help you?” to show they have your full attention and you are interested in answering their questions.

The customer should *never* feel like they are burdening us—even if you feel the answer to their question should be common sense, remember that many of our customers are new to navigating a school band program, private lessons, or buying an instrument.