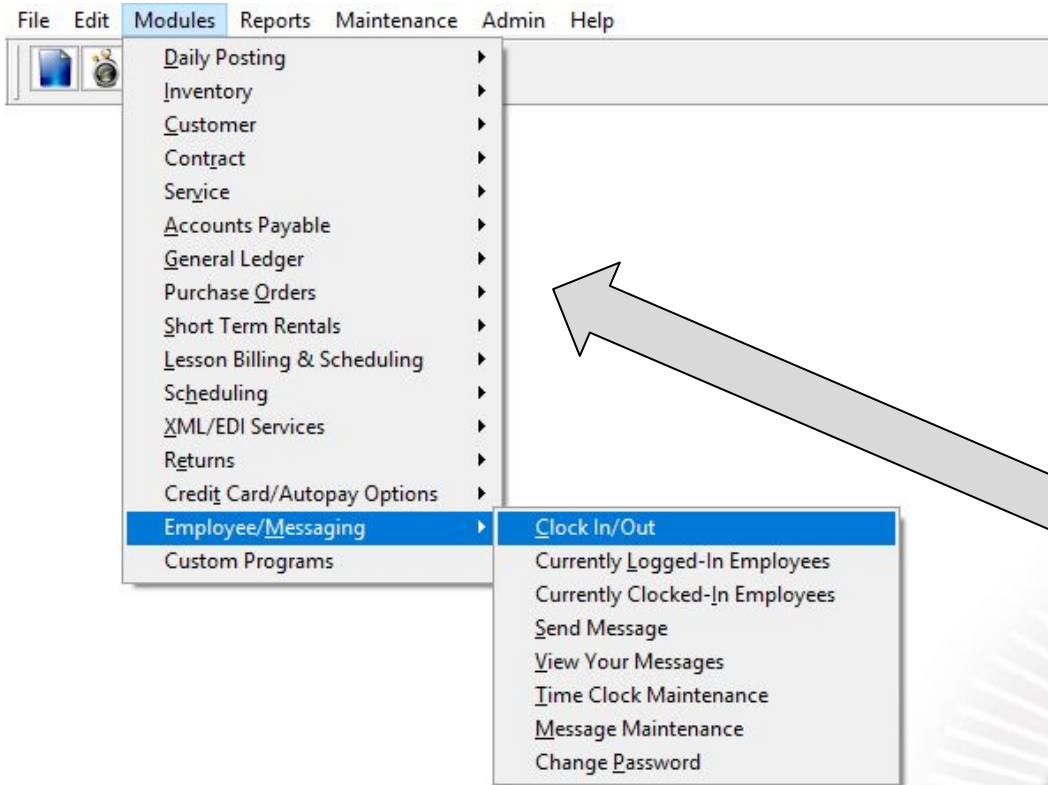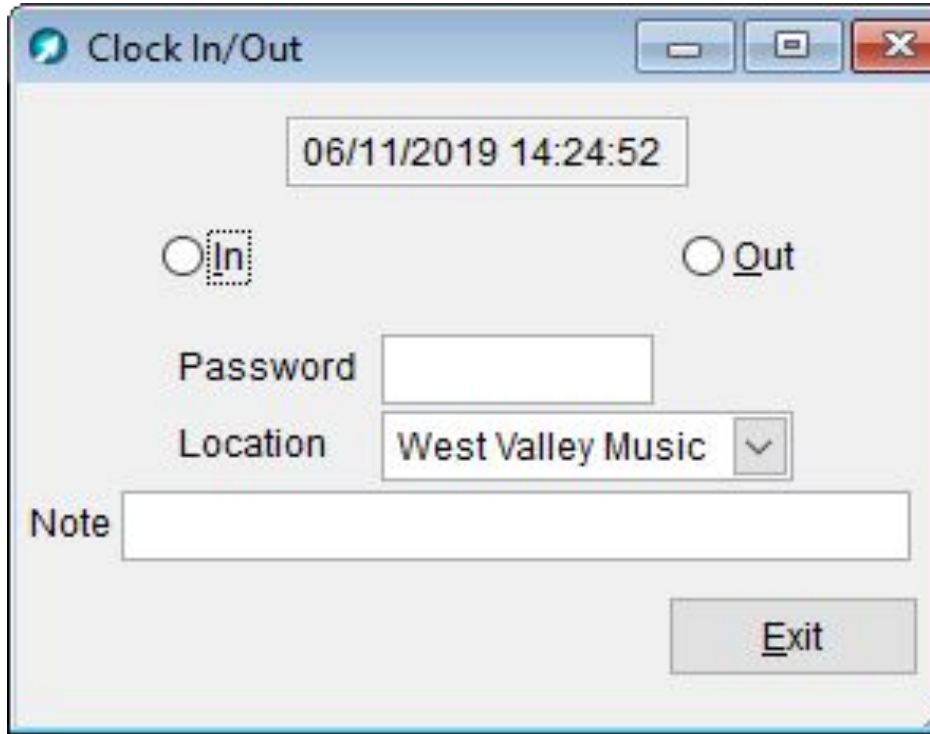# Training Level 1

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:

File   Edit   **Modules**   Reports   Maintenance   Admin   Help

Daily Posting ▸
Inventory ▸
Customer ▸
Contract ▸
Service ▸
Accounts Payable ▸
General Ledger ▸
Purchase Orders ▸
Short Term Rentals ▸
Lesson Billing & Scheduling ▸
Scheduling ▸
XML/EDI Services ▸
Returns ▸
Credit Card/Autopay Options ▸
Employee/Messaging ▸
Custom Programs

Clock In/Out
Currently Logged-In Employees
Currently Clocked-In Employees
Send Message
View Your Messages
Time Clock Maintenance
Message Maintenance
Change Password

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

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: Ringing 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.

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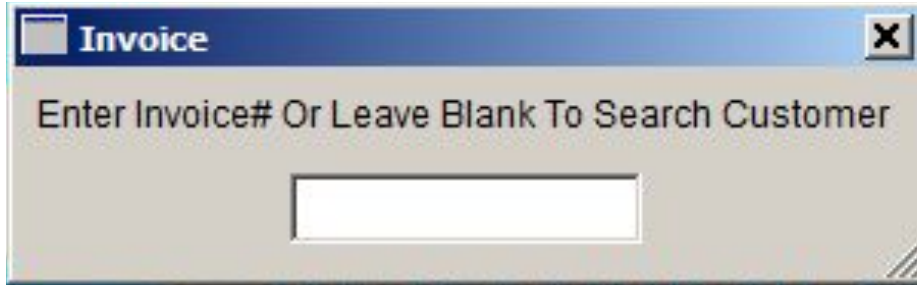
2) If the customer is paying in cash, enter the exact amount they give you in the Pymt Amount box. Then, select Cash in the Pymt Method drop-down menu, and his ENTER until you reach the Post button.

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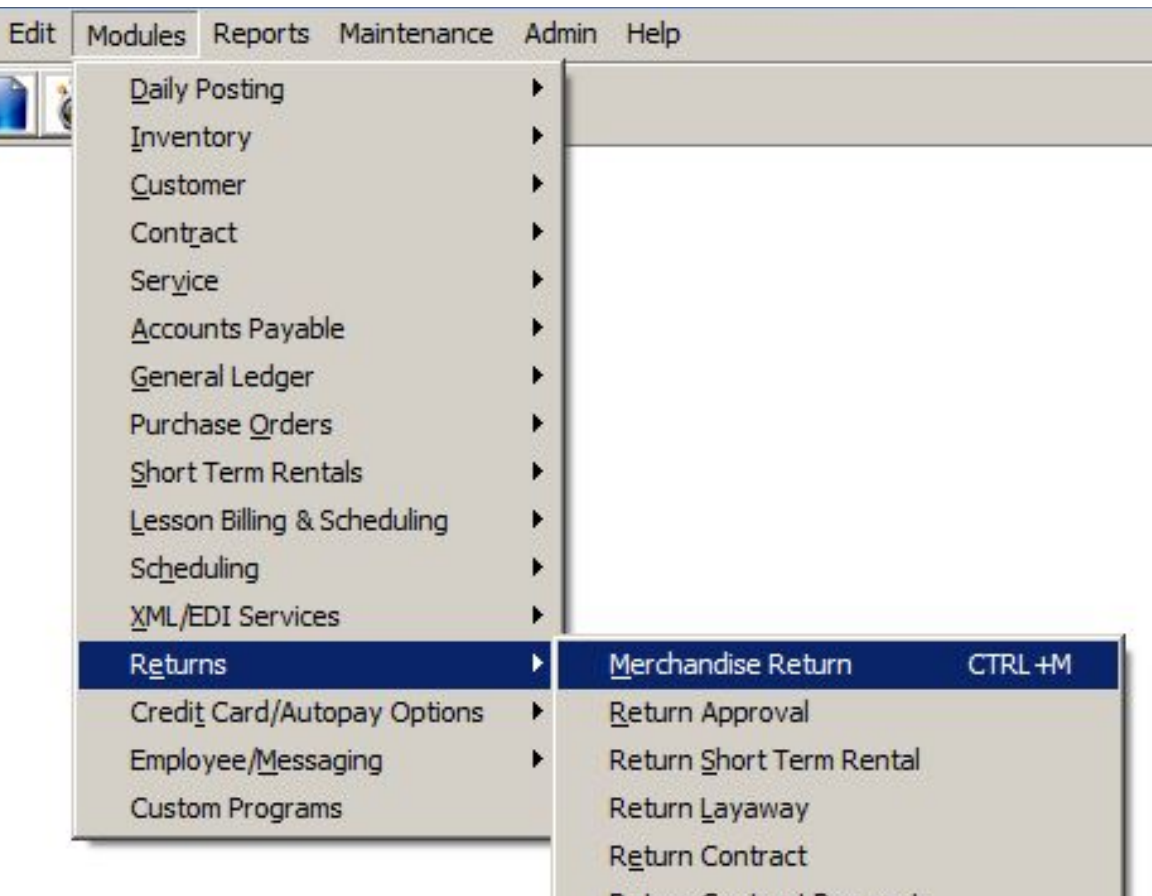
To start a return, go to Modules>Returns> Merchandise Return then hit ENTER.

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.

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.)
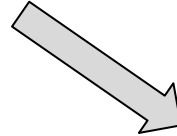
Answering the Phone

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.
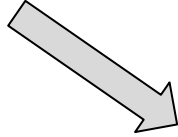
This is (insert name).

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.