

# Training Level 1

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## Clocking In

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

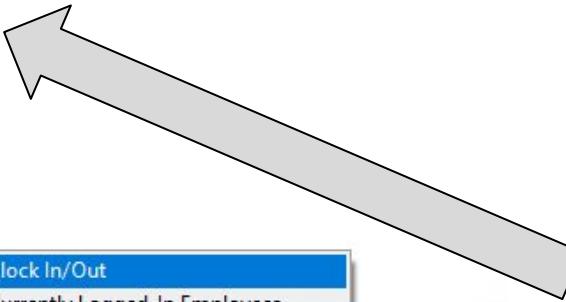
At any computer in the storefront, follow these steps:



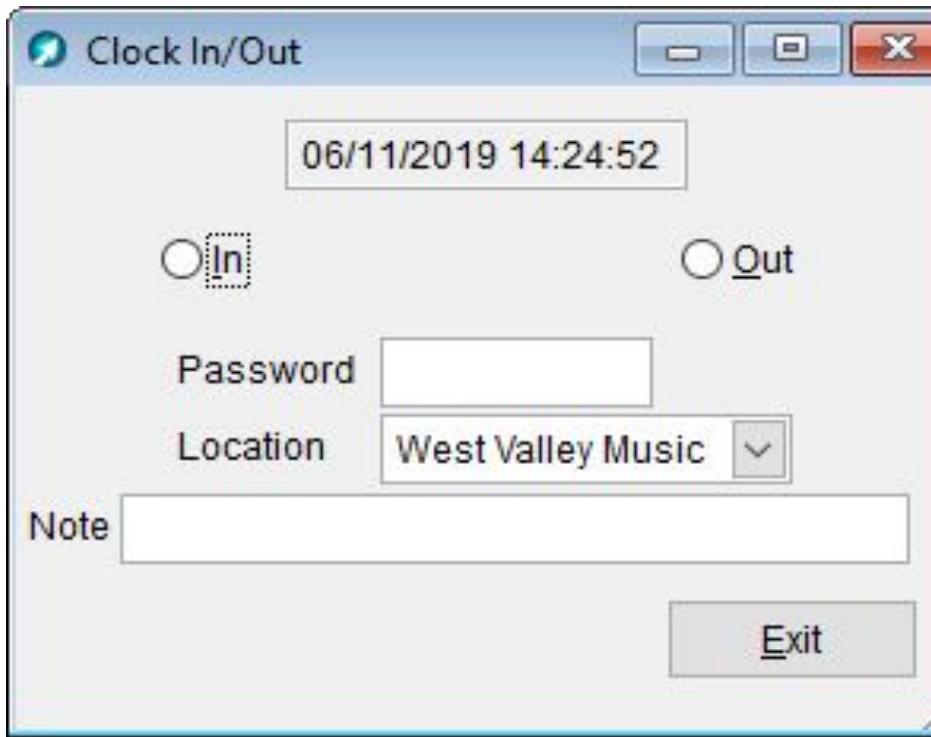
- [Daily Posting](#)
- [Inventory](#)
- [Customer](#)
- [Contract](#)
- [Service](#)
- [Accounts Payable](#)
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[Clock In/Out](#)

- [Currently Logged-In Employees](#)
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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...**

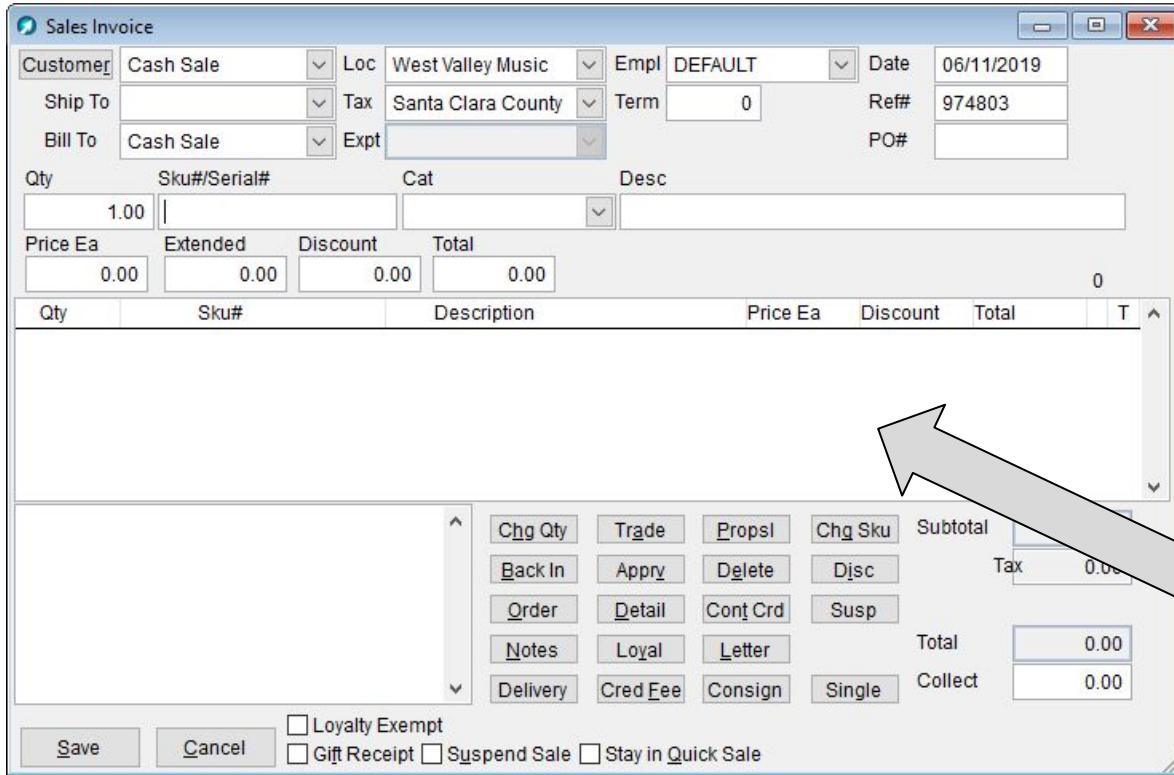
...it's time to learn an important, everyday task:  
**Ringing up a sale!**



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:

Enter Payments

Transaction	Orig Amt	Balance
Sales Invoice	16.67	0.00

Total Due: **\$16.67**

Balance: **\$0.00**

Pyamt Amount: **0.00**

Pyamt Method: **Offline CC**

Pyamt Reference:

Apply a Credit

Invoice #

Orig Amount **0.00**

Amt to Apply **0.00**

Pay Type	Amount	Reference #
Offline CC	16.67	

Add

Delete

Cancel

Post

- 1) In the **Pyamt 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 **Pyamt Amount** box. Then, select **Cash** in the **Pyamt 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:

-  [Daily Posting](#)
-  [Inventory](#)
-  [Customer](#)
-  [Contract](#)
-  [Service](#)
-  [Accounts Payable](#)
-  [General Ledger](#)
-  [Purchase Orders](#)
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-  [Lesson Billing & Scheduling](#)
-  [Scheduling](#)
-  [XML/EDI Services](#)
-  [Returns](#)
  -  [Merchandise Return](#) CTRL +M
  -  [Return Approval](#)
  -  [Return Short Term Rental](#)
  -  [Return Layaway](#)
  -  [Return Contract](#)
-  [Credit Card/Autopay Options](#)
-  [Employee/Messaging](#)
-  [Custom Programs](#)

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



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  
 Search By Invoice        
 Show All Items     

Location:  Ref#   
 Tax:  Date   
 Bal.

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 - I	3.75	0.00	0.000	0.00
02/05/2019	961950	1.00	HL00210096	West Valley Manuscript Paper - I	3.75	0.00	0.000	0.00
02/05/2019	961927	1.00	A10780	Music Theory Practice Papers 2I	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  Restock Fee   
 Tax  Restock Tax   
 Total  Total Return

Auto Reduce Balance     

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.

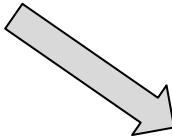
(If they had purchased multiples of the same item but aren't returning all of them, you can adjust the number they are returning under the **Qty Ret.** column.)

## Answering the Phone

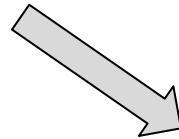
Oftentimes customers will call the store to ask questions before coming in person. This is a great opportunity to build their confidence in us and earn their business.

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.