

BOSTON FAM

STORIS POINT OF SALE WORKBOOK

TABLE OF CONTENTS

01 Logging into the STORIS Learn Account

02 Launching a Sales Order

03 Step 1: Customer Step - Entering Guest information

04 Step 2: Merchandise Step - Adding SKU’s

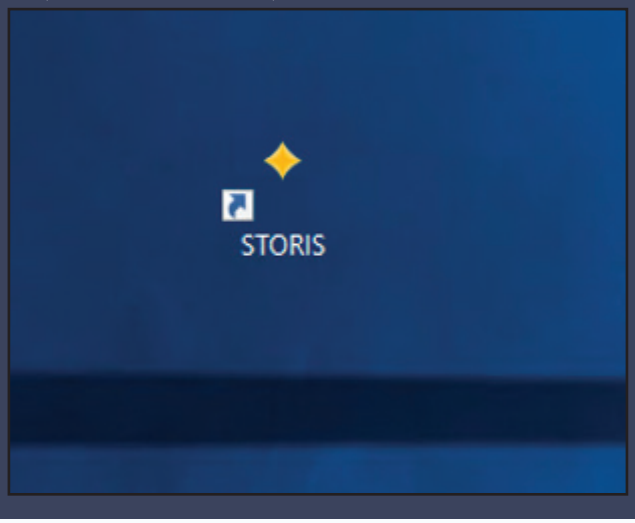
05 Step 2: Merchandise Step - Searching for Products

06 Step 3: Fulfillment Step - Scheduling an Order

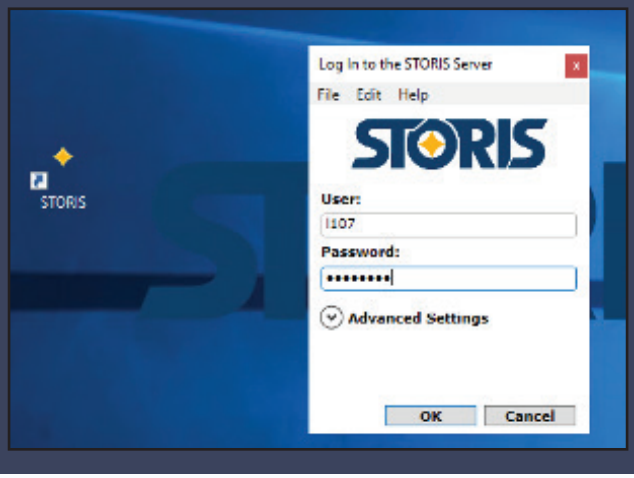
07 Step 4: Payment Step - Deposits

LOGGING INTO THE STORIS LEARN ACCOUNT

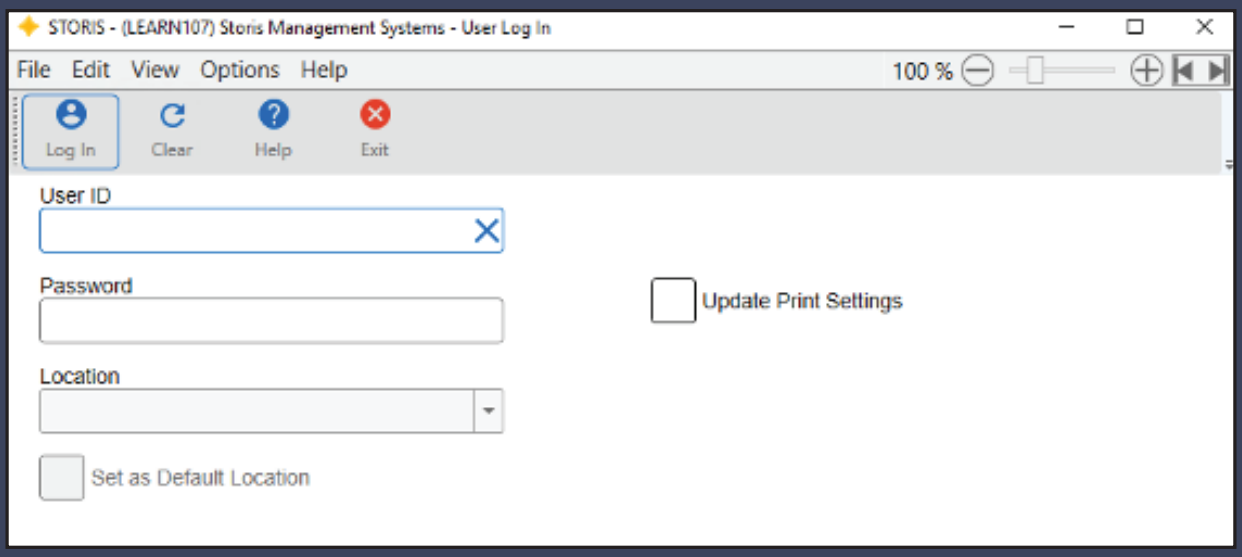
STEP 1:
Double Click on the Storis Desktop Icon (yellow diamond)



STEP 2:
Use Learn Account credentials to access Storis Learning Environment
User: l107 Password: Learn107

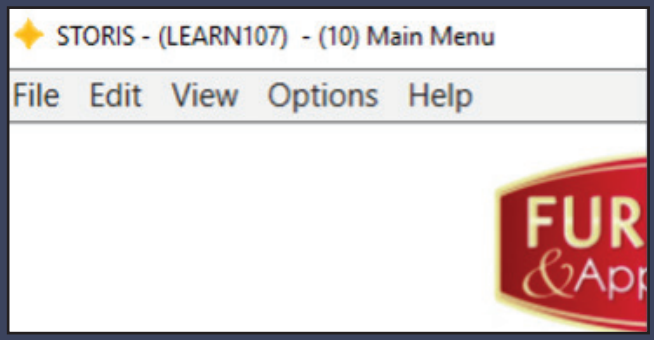


STEP 3: A new credentials pop up window will appear. Enter your personal Storis credentials and click login (4 letter User ID, 5 number password)



STEP 4:
Check to make sure that in the top left corner the screen reads, “STORIS - (LEARN107)

Congratulations you are now logged into the STORIS Learning Environment!



LAUNCHING A SALES ORDER

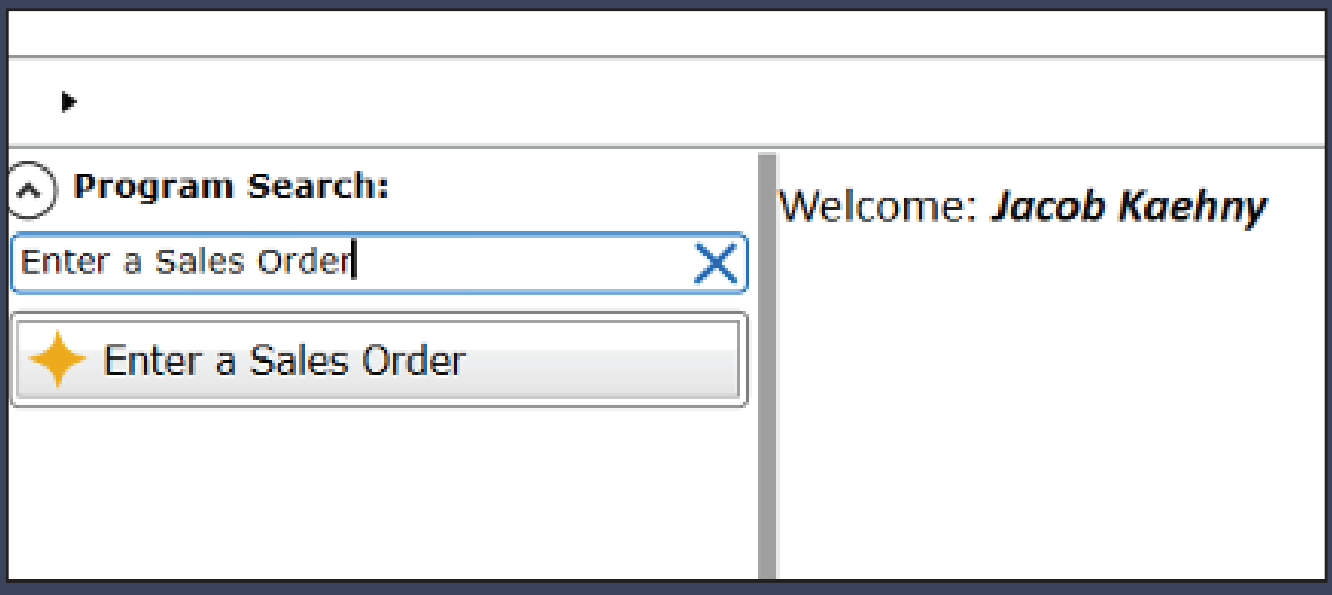
STEP 1:

On the main screen of Storis Desktop click on the Program Search Field and enter, “Enter a Sales Order”



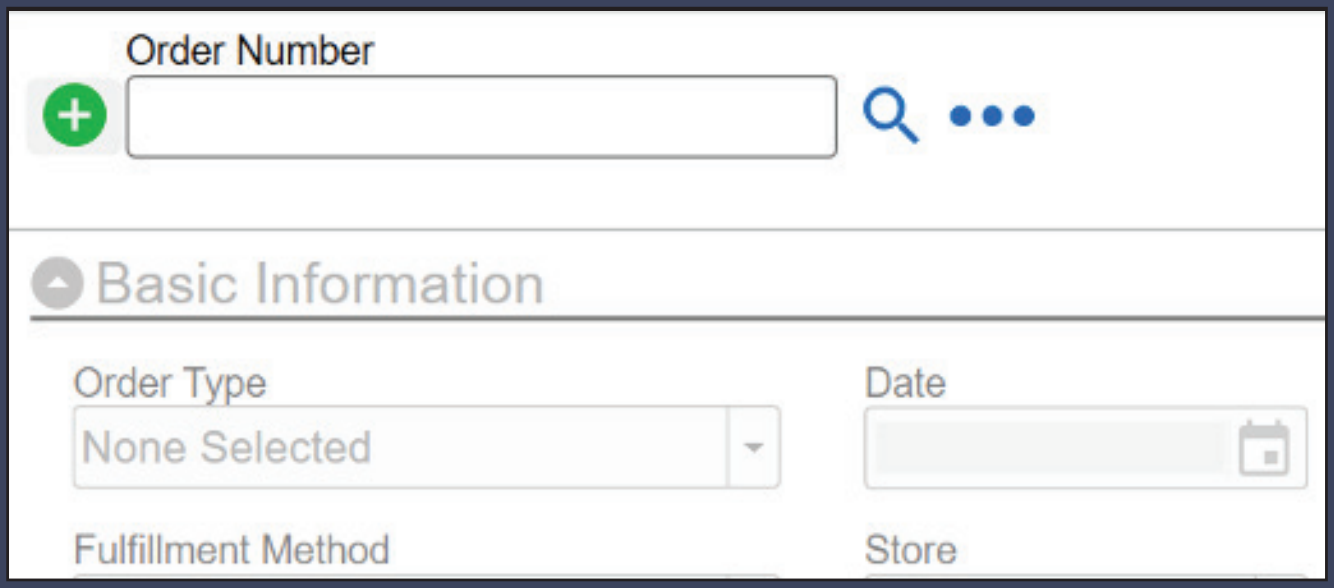
STEP 2:

Double Click on the “Enter a Sales Order” label to launch



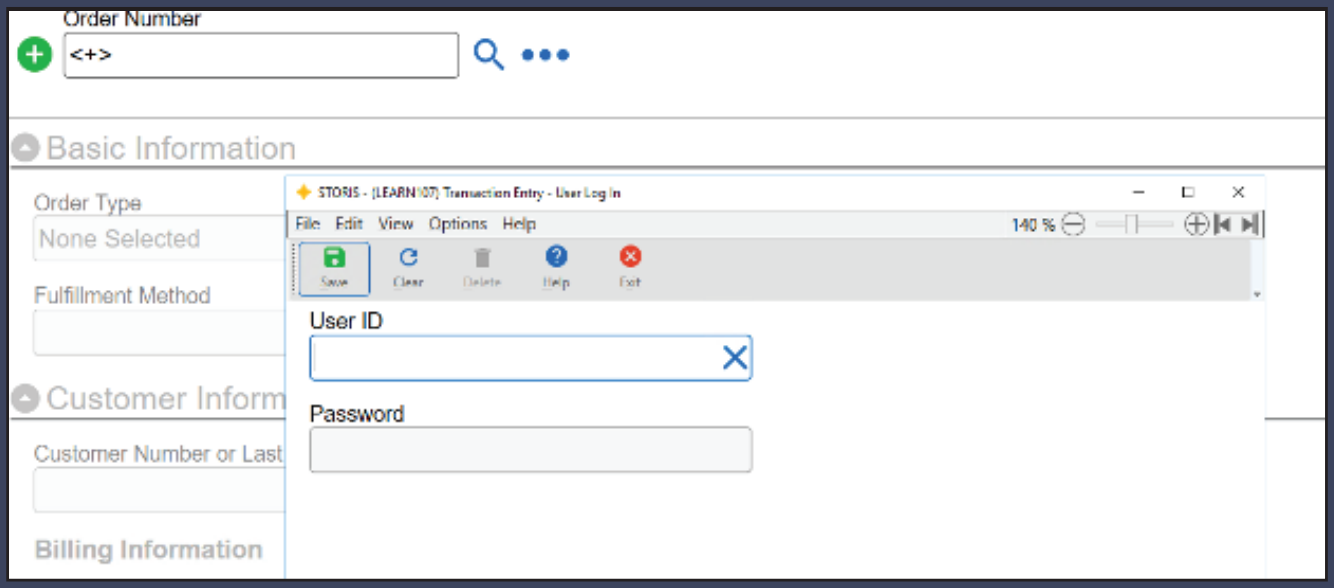
STEP 3:

Click on the green plus symbol next to the entry field under Order Number



STEP 4:

Enter your Storis Credentials



Note: Your Storis credentials can be found by checking your work email for the word "STORIS" or by sending an email to ithelp@bostonfam.com

STORIS ORDER ENTRY – CUSTOMER STEP

Special Notes

- When in Storis ensure that everything is capitalized by making sure the Caps Lock is turned on.
- Use tab to move between field quickly

Part 1: Basic Information Section Overview:

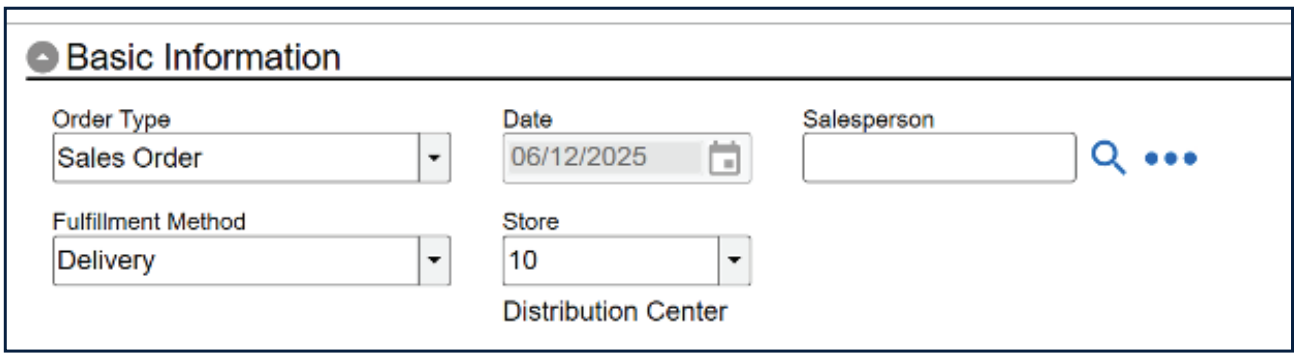
Order Type Allows you to change the order to a quote

Date Current date the order is being written

Salesperson Specifies who is writing the order and using the "..." allows you to split orders between two RC's. Note: Only 50/50 splits are allowed in the system

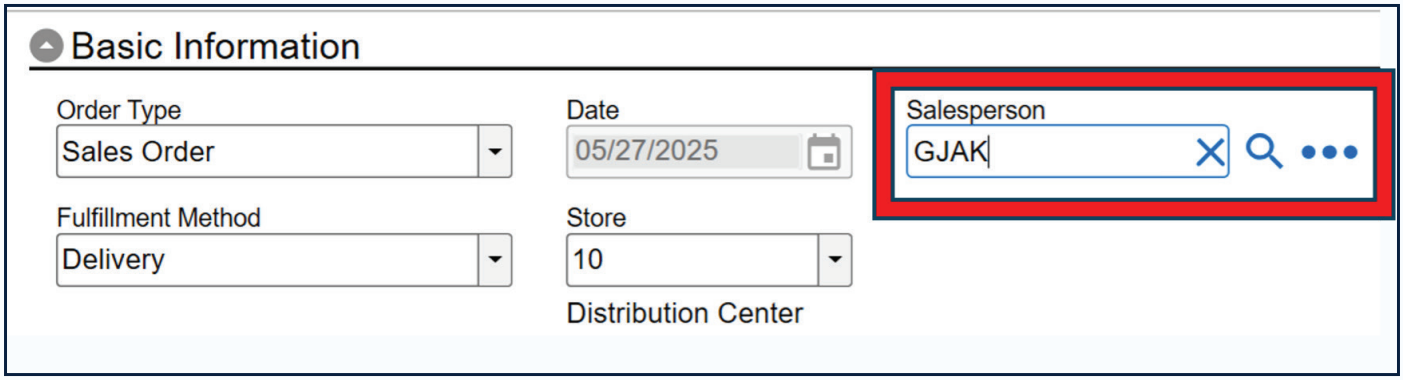
Fulfillment method allows you to specify whether the order is a Delivery or Pickup

Store This drop down will automatically be set to your home location. You can change this if you are working at a different store location.



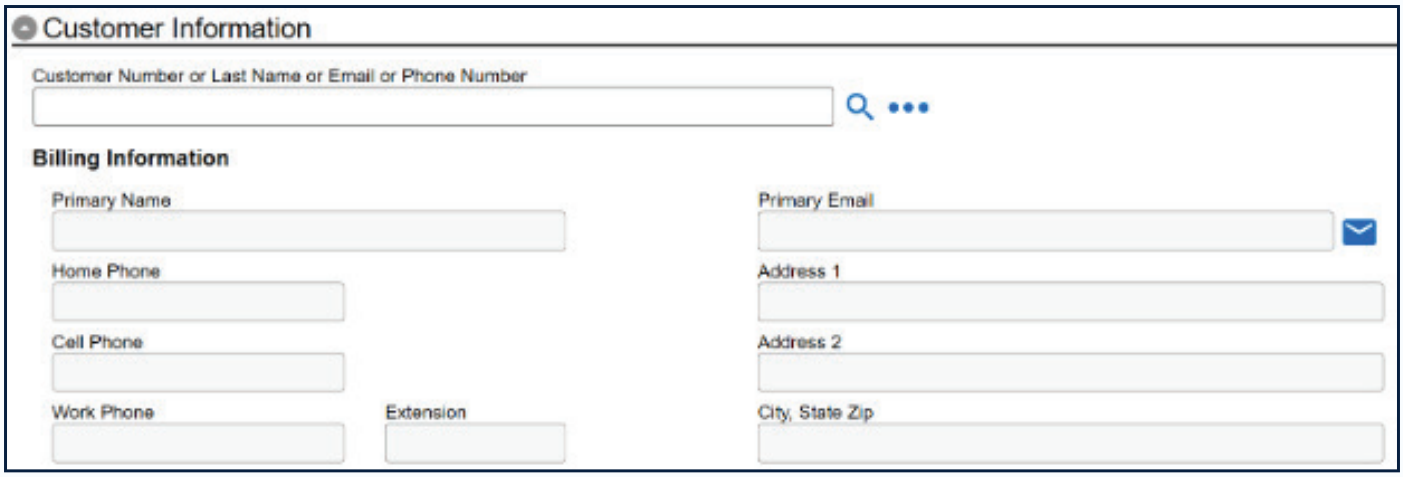
Basic Information Section - Practice

- **Step 1** – Click on the drop down for “Order Type” and view the option to change the order to a quote
- **Step 2** - Enter your 4 letter Storis User Id into the “Salesperson” field and tap the Tab key
- **Step 3** - Confirm the ”Fulfillment Method” is selected to Delivery



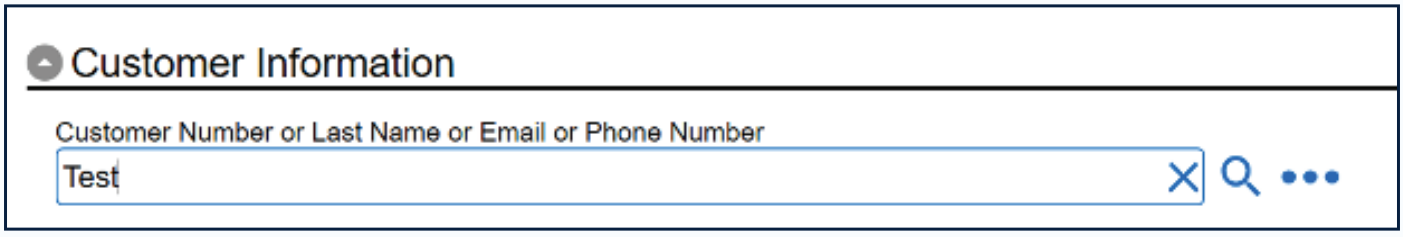
Part 2: Customer Information Section Overview

The next part of the Customer Step in Storis is to first look up existing customers to use a customer’s existing profile or to create a new customer.



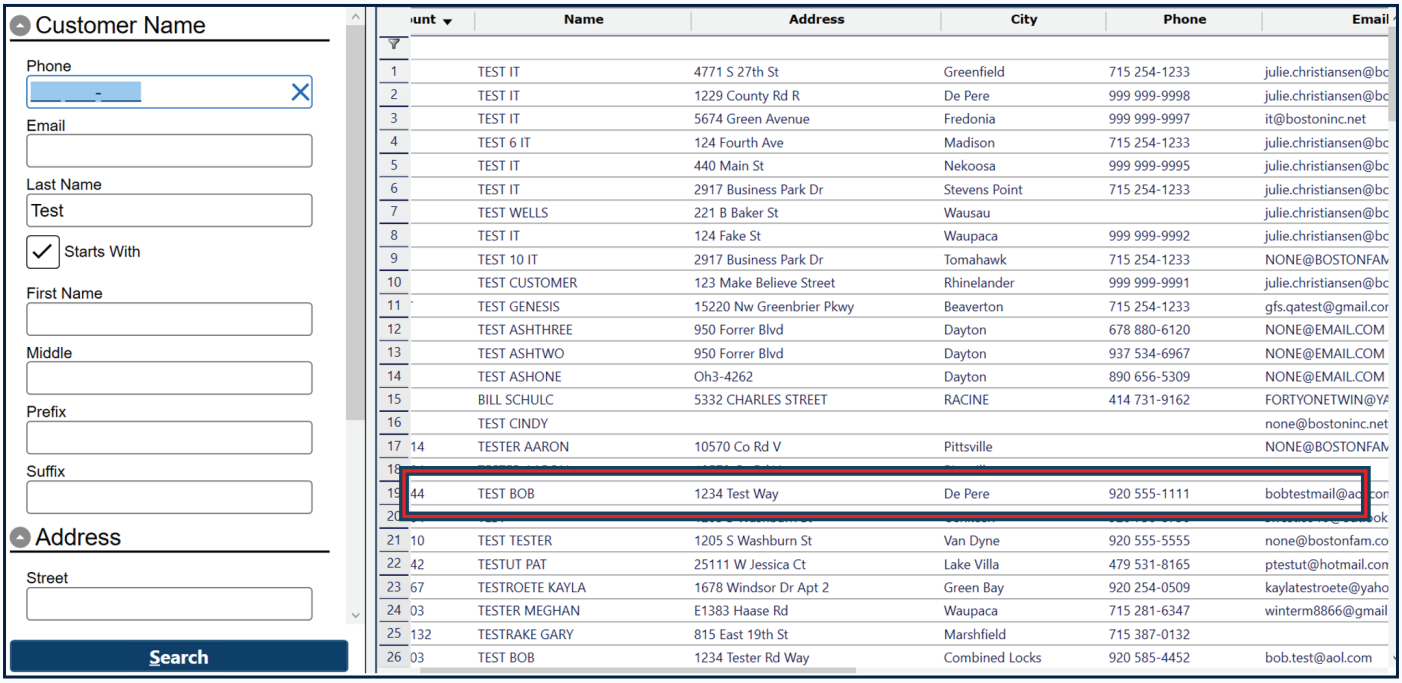
To begin we will first look at searching for an existing customer and selecting their profile:

- **Step 1** – We will enter in the name “Test” and press the Tab key

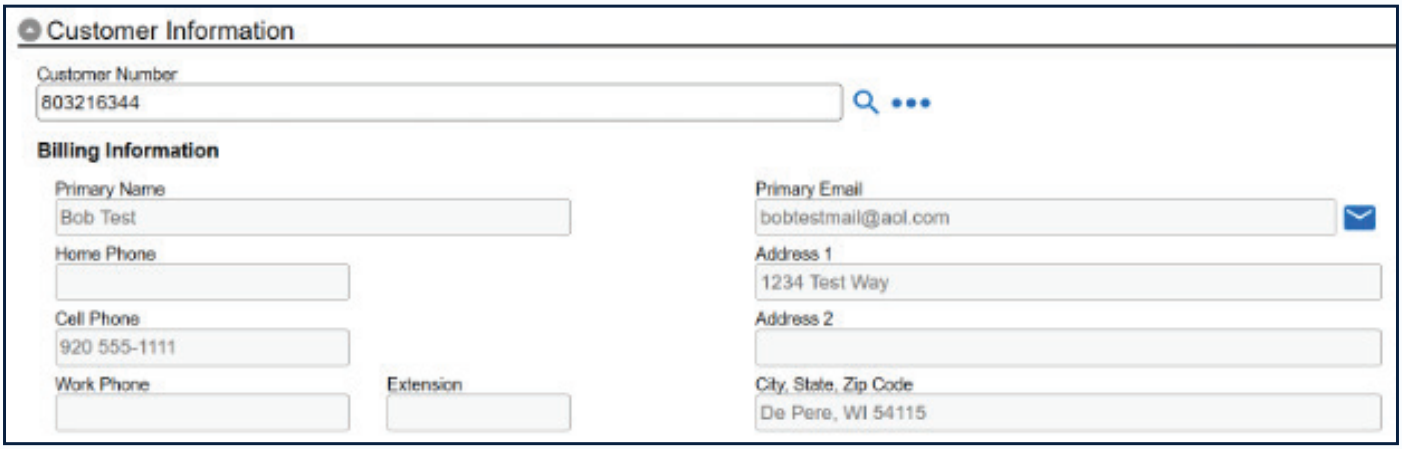


STORIS ORDER ENTRY – CUSTOMER STEP (cont.)

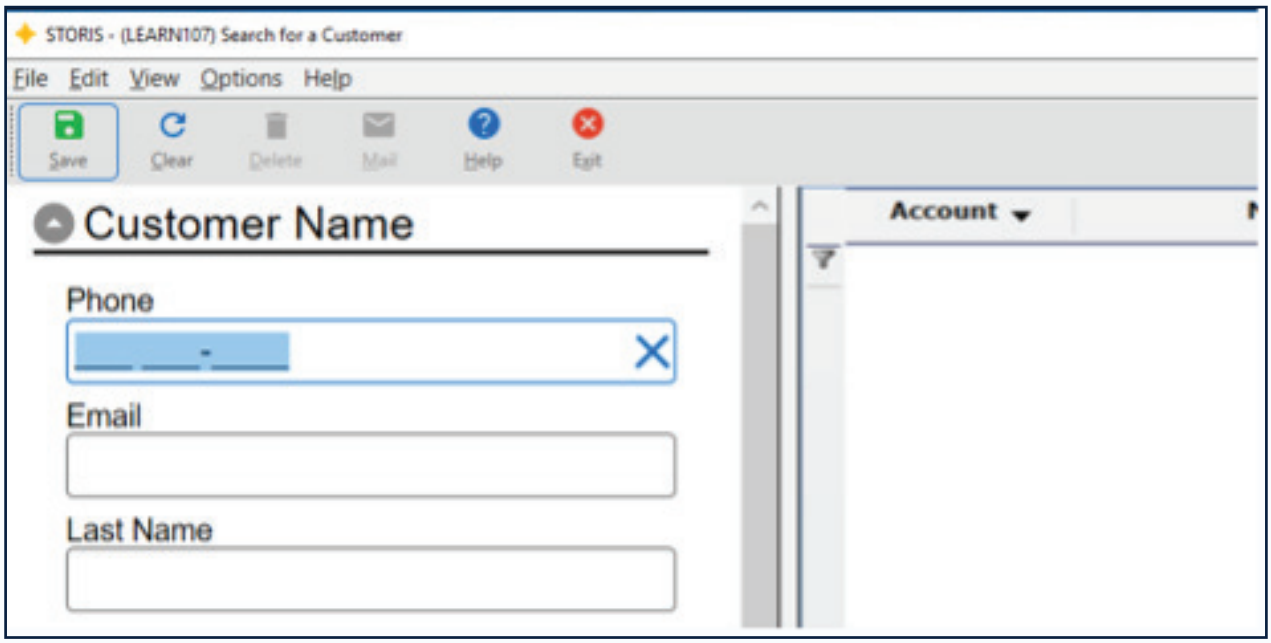
- **Step 2** -The system will now display all existing customers with “Test” in their name. We will select “Test Bob at 1234 Test Way De Pere 920-555-1111” by double click their entry.



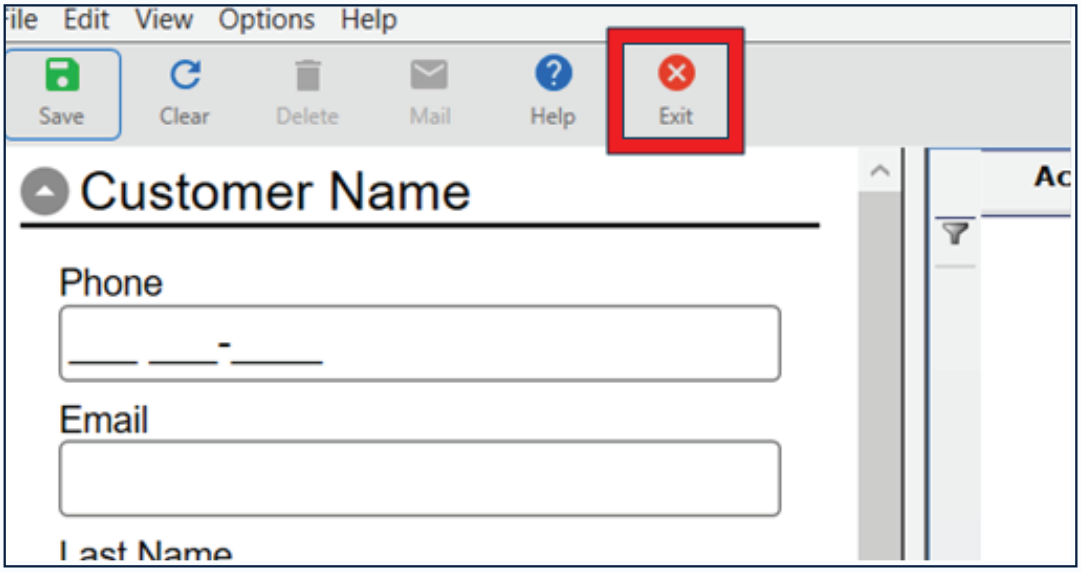
- **Step 3** -Once we double click “Test Bob” the customer’s information will be entered automatically into the Customer Information section and we are ready to move to the next step in Storis, the Merchandise Step.



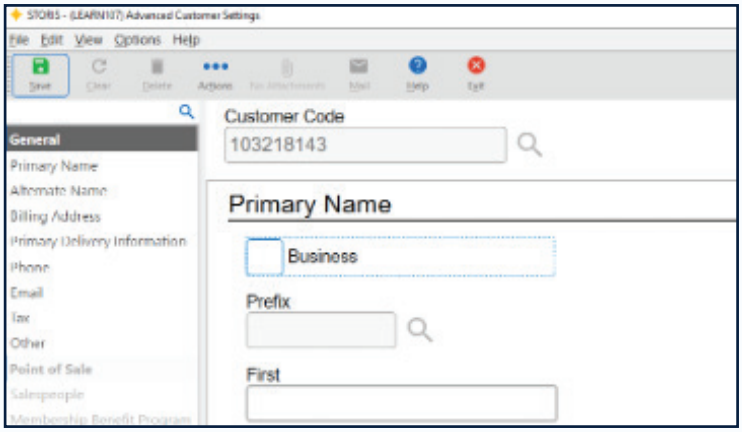
- **Step 4** - We will now delete the Customer number from the “Customer Number” field, an hit tab. This will open up another “Search for a Customer Screen” that will be blank



- **Step 5** - If the system cannot find the existing customer or the customer has never bought from us before, we have to click on the red “Exit” button on the “Search for a Customer” screen to have the system allow us to make a new customer.



- **Step 6** - You will now be on a screen titled Advanced Customer Settings. This screen allows you to begin to enter the customer’s information.



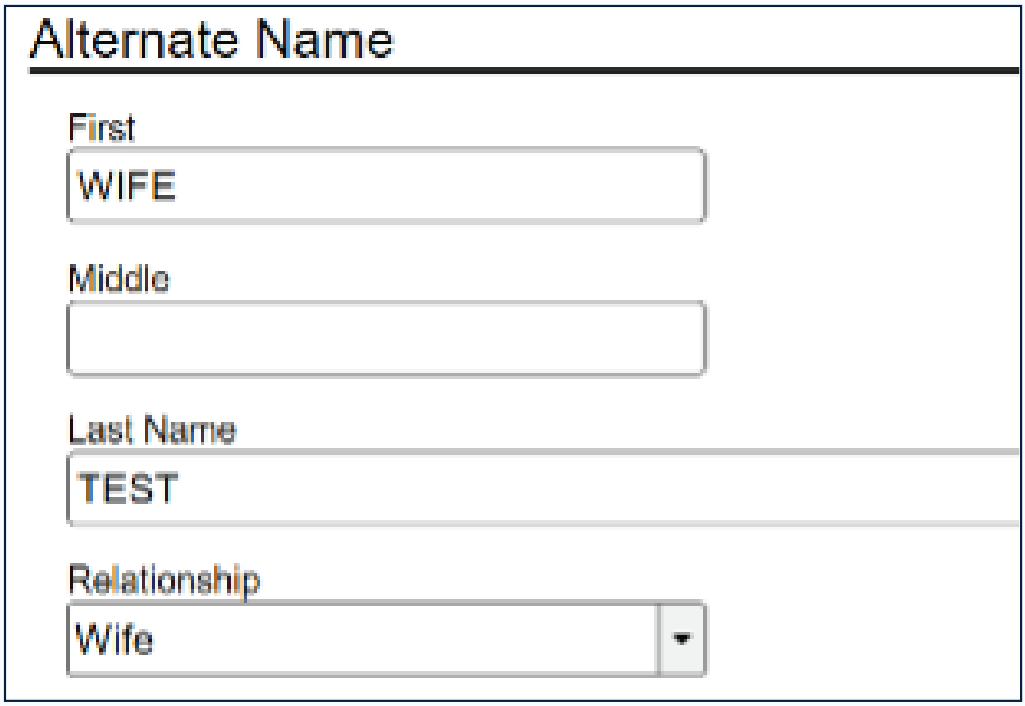
STORIS ORDER ENTRY – CUSTOMER STEP (cont.)

Part 3: Entering New Guest Information

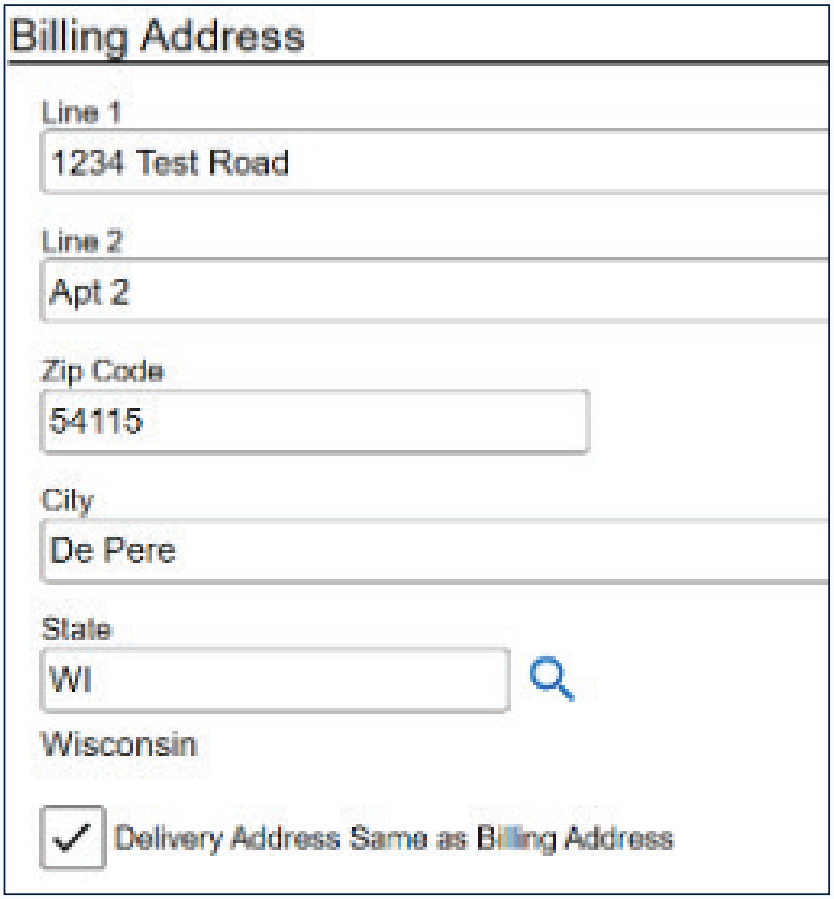
- **Step 1** - Begin by entering guest's first name and last name into their respective fields under the "Primary Name" section



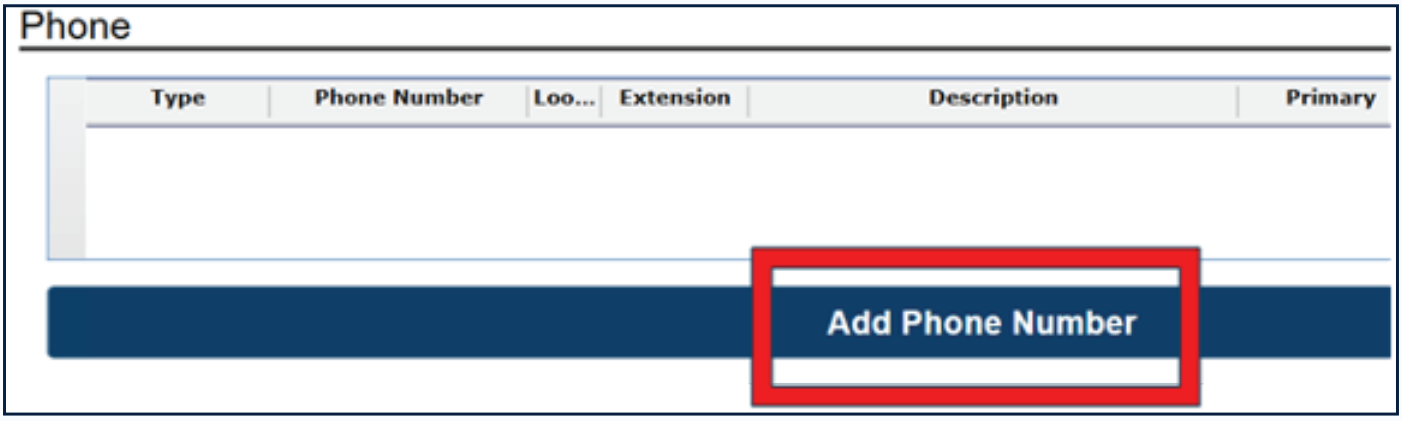
- **Step 2** - Enter Alternative Name if the guest is buying for a different individual or they want to list a significant other. Then click the "Relationship" drop down and select appropriate option



- **Step 3** - Enter Billing Address information. Be sure to spell out all words and not use abbreviations. Also line 1 of the billing address should be street address while line 2 is used for Apt/Unit/Building numbers. Note that you can unclick “Delivery Address Same as Billing Address” if the guest has a separate delivery address.

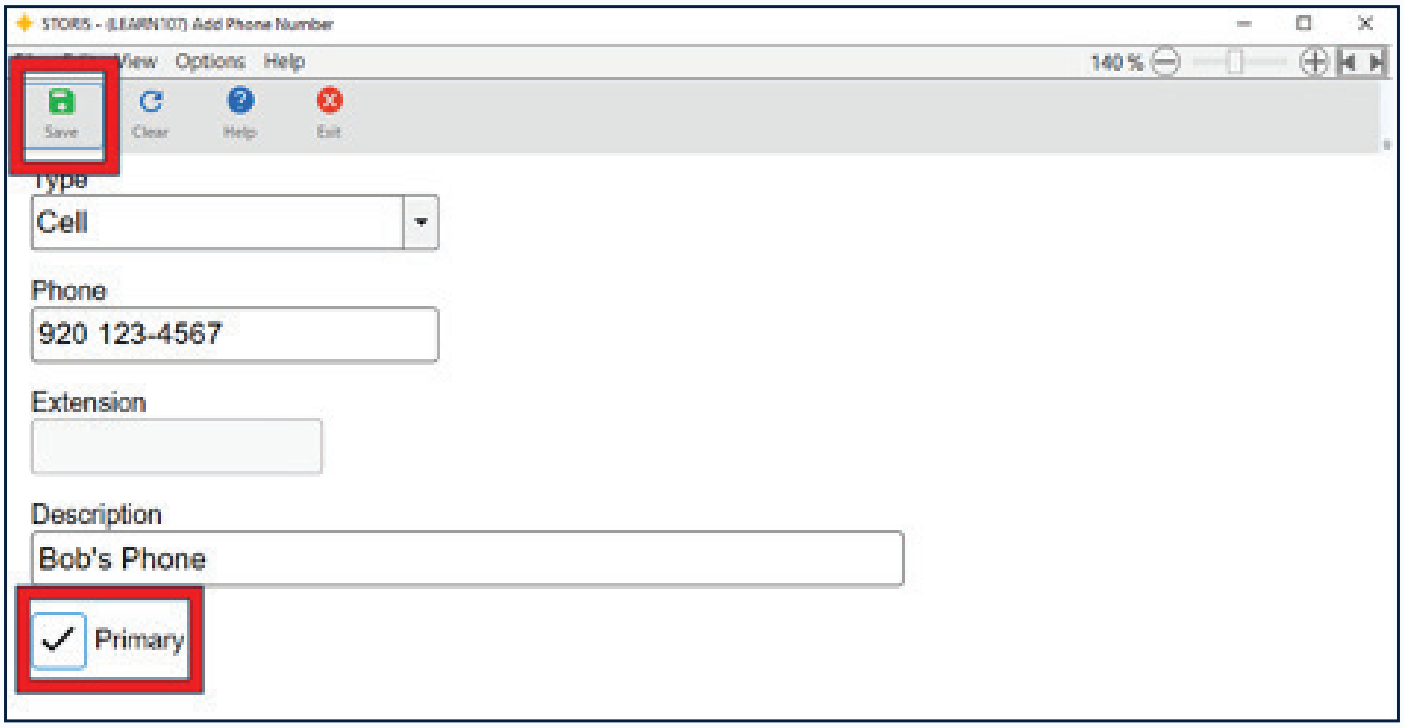


- **Step 4** - Click the blue “Add Phone Number Button”



STORIS ORDER ENTRY – CUSTOMER STEP (cont.)

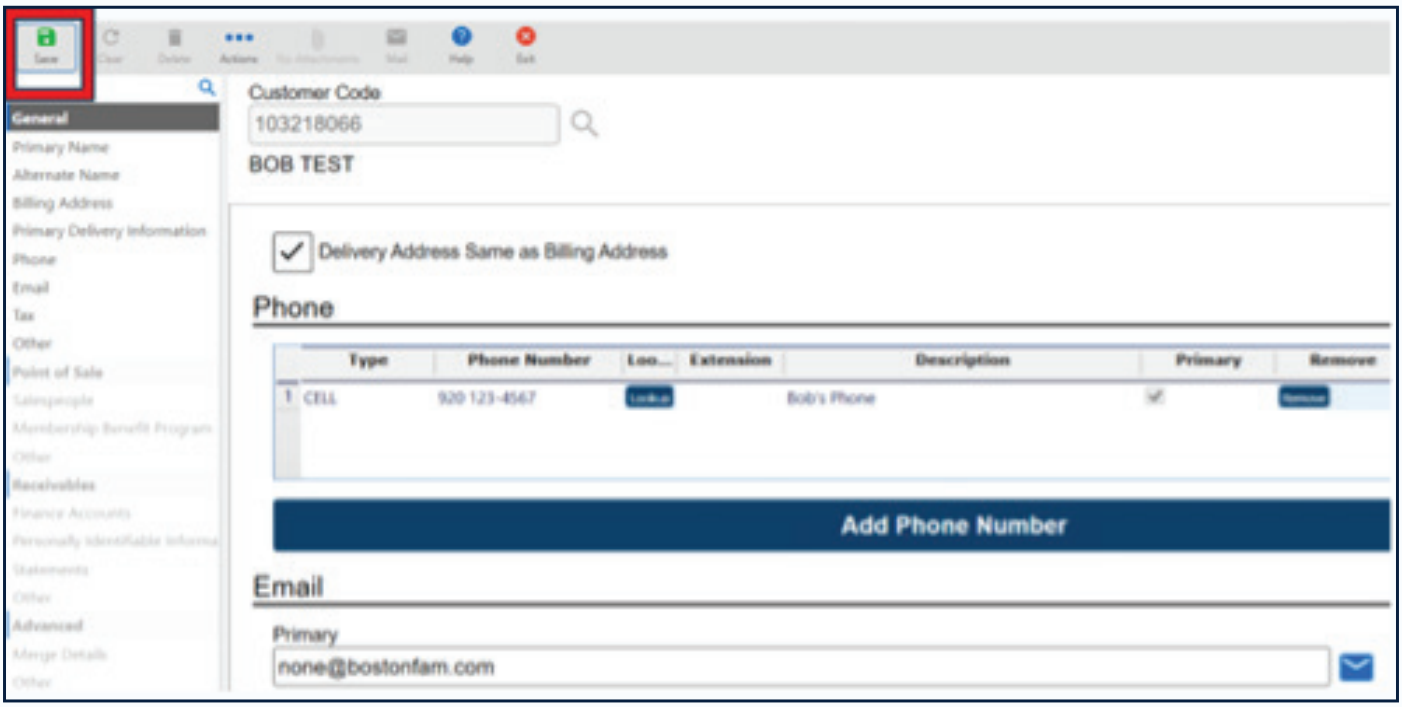
- **Step 5** - Click the drop to select Home, Cell, or Work, then enter phone number and list a description if necessary. Click the green Save icon. Note that at least one phone number must have the Primary selected. The phone number selected as primary will receive all notifications.

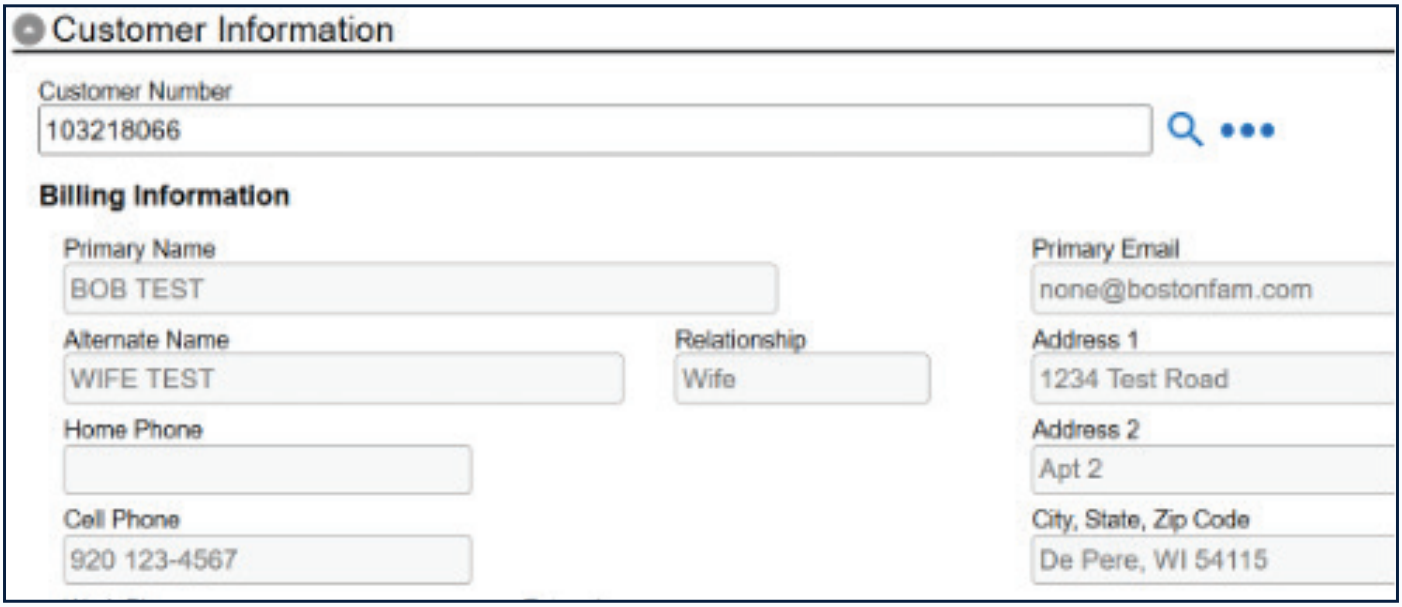


- **Step 6** - Enter an email address into the Primary field under the Email Section. Note all automated notifications for delivery/pickups will be sent to the specified email address.

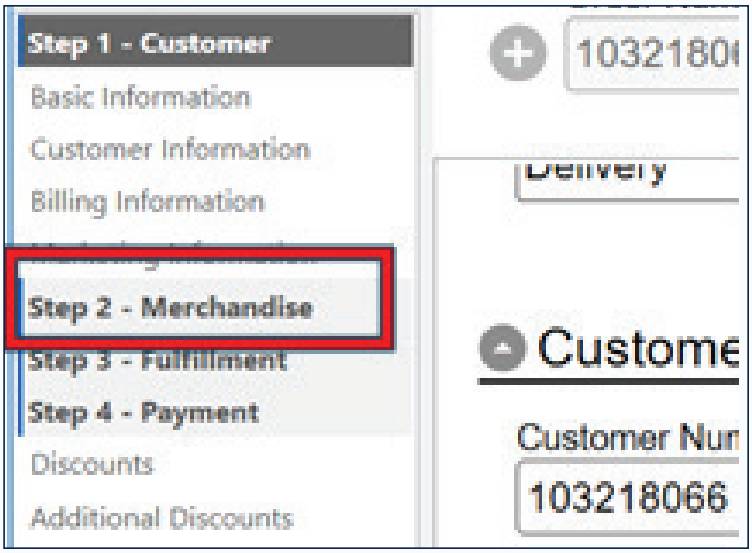


- **Step 7** - Click the green save icon in the upper left corner to save all guest information to the Customer information section





- **Step 8** - Once the information is saved you are ready to click on "Step 2 – Merchandise" on the left side of the screen to begin adding items to guest's order.



STORIS ORDER ENTRY – CUSTOMER STEP (cont.)

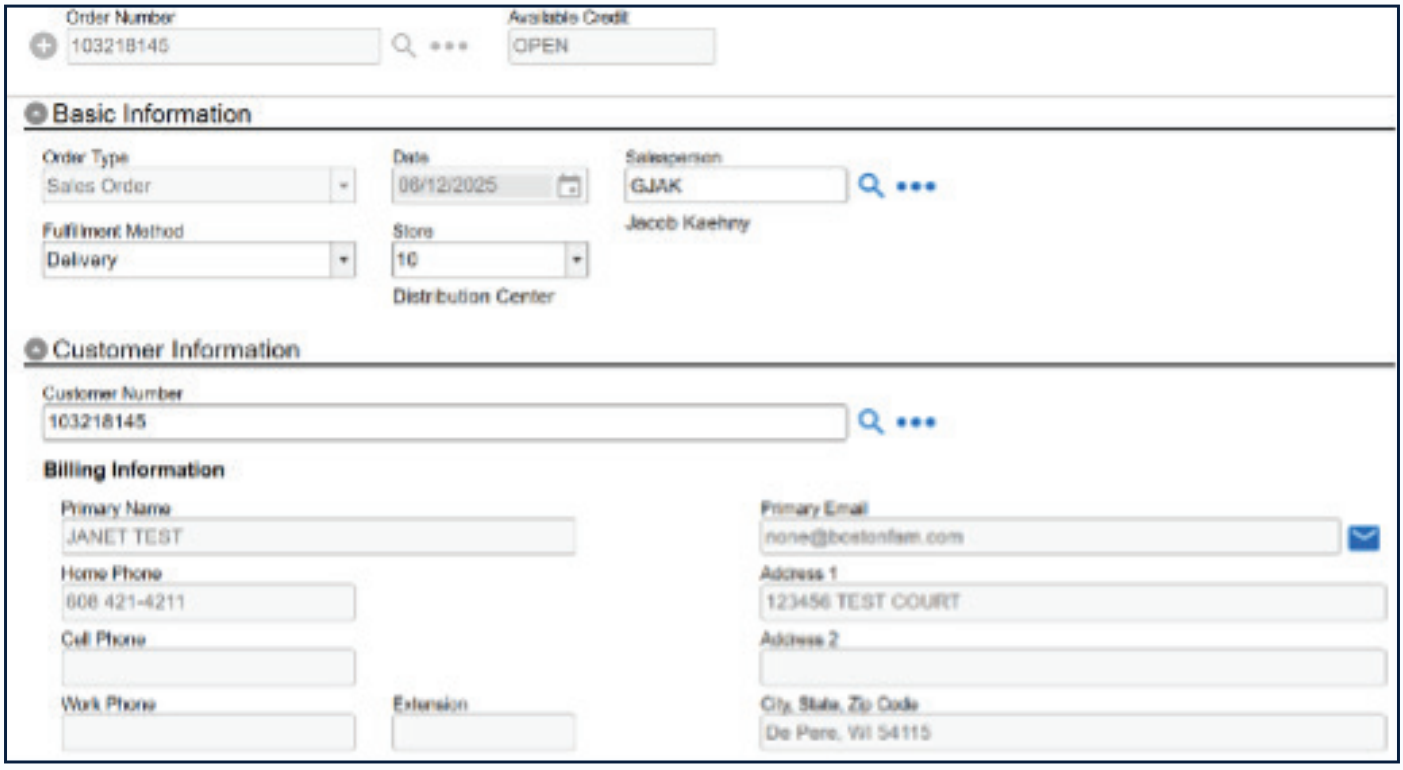
Part 4: Entering Customer Information Practice

Ensure that you do not have any information in the “Customer Information” field in Storis. If you do, simply click the red “Delete” button that looks like a trash can and then click the green “Plus” symbol to start a new order.

- **Step 1** - Enter your storis user credential into the Salesperson field
- **Step 2** - Create a new customer with the following information:
    - Janet Test
    - 123456 Test Court
    - 54115 De Pere WI
    - 608-421-4211
    - none@bostonfam.com

Note: If you are stuck ask yourself if you clicked the red “Exit” button to get out of “Search for Existing Customer”

- **Step 3** - Check that your screen looks like this:



STORIS ORDER ENTRY – MERCHANDISE STEP

Part 1: Merchandise Step Overview

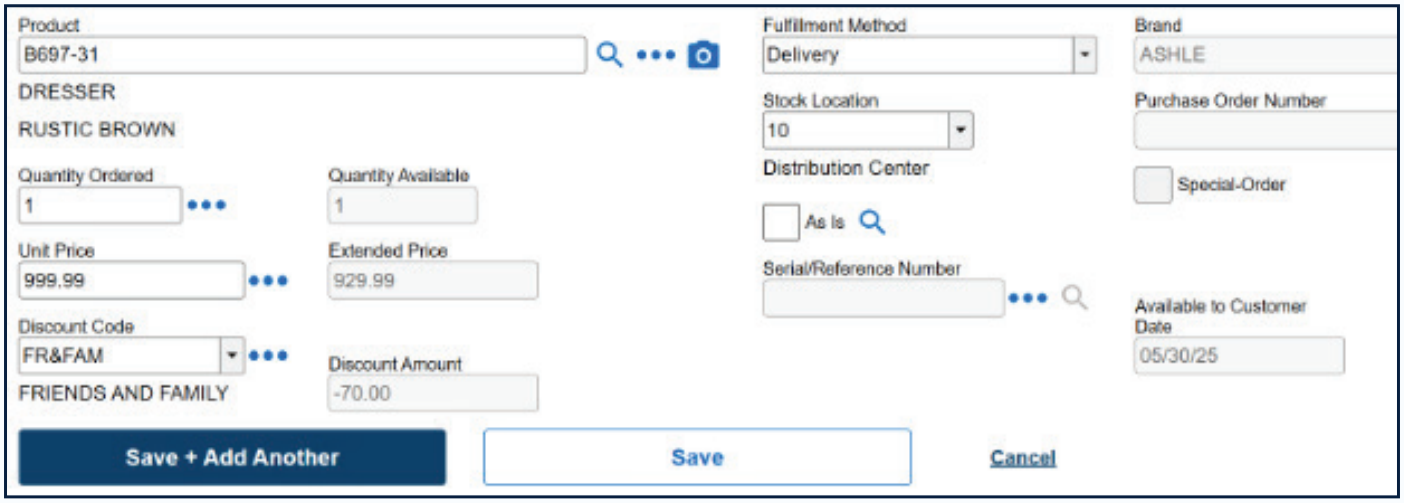
The Merchandise step allows you to perform many different functions:

- Add products to the order by entering the sku
- Search for products using many different search filters
- Control quantity of a product
- Control discounts
- Whether the product will be Delivered or Picked Up
- Control the stock location of an item
- Reserve Clearance Merchandise

Below we will be going over each of these functions and how they work.

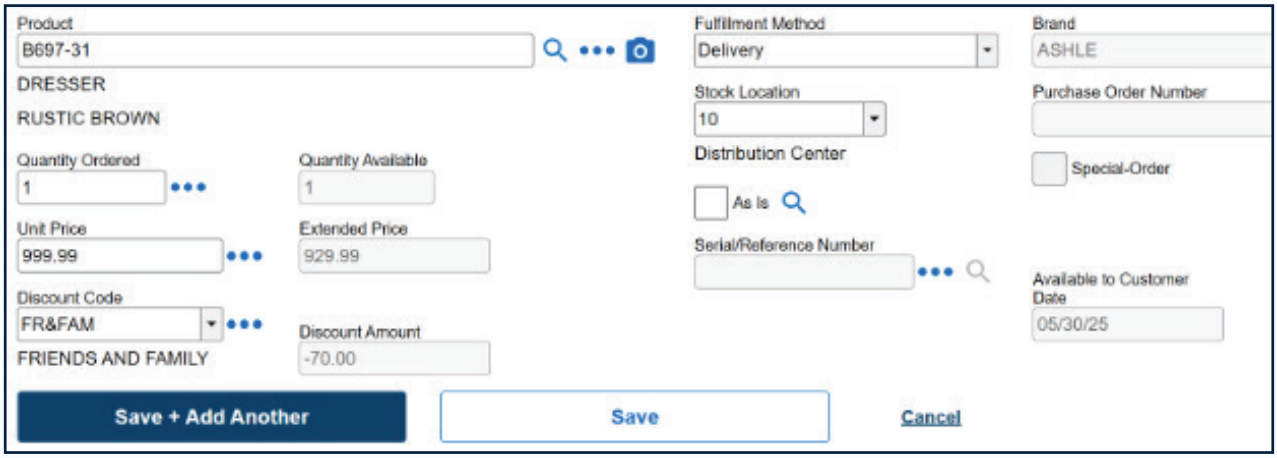
Part 2: Merchandise Step - Adding Skus

- **Step 1** - Enter the Sku of the product you wish to add to the guest's order and tap the tab key. In this example I typed in B697-31 and hit the tab key.



STORIS ORDER ENTRY – MERCHANDISE STEP (cont.)

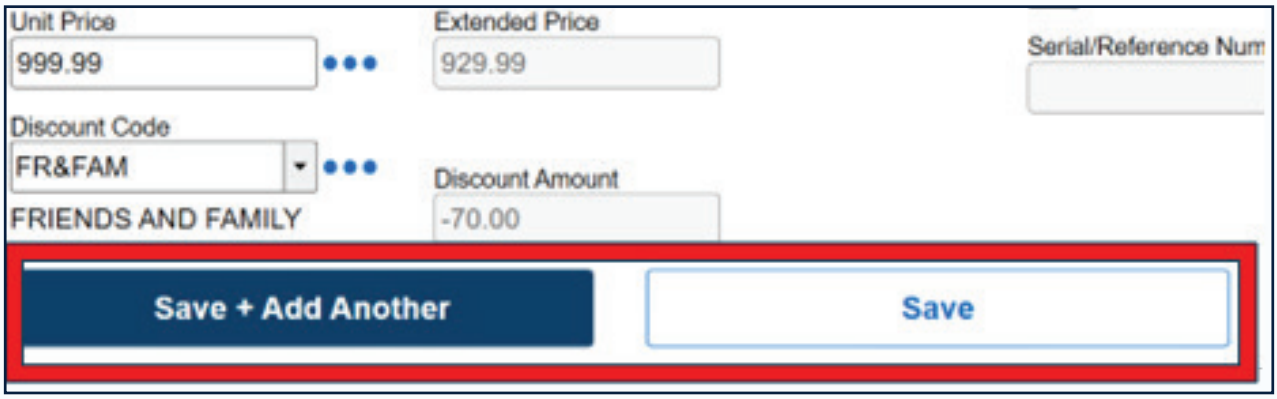
- **Step 2** - You can now adjust the quantity of the product, select the discount amount using the discount drop down, change the fulfillment method, alter the stock location, and view the Available to customer date with this section.



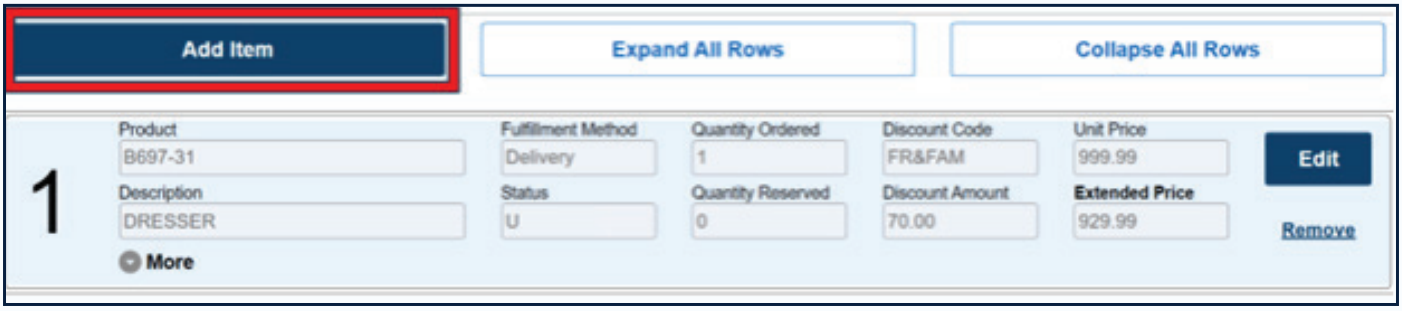
Note: Stock location is where the product is currently located. There are typically only two stock locations you will use and these are based on two situations:

- The product is brand new - Stock Location = 10 Distribution center
- The product is clearance – Stock Location = Your Store

- **Step 3** - Click the ”Save + Add Another” button if you have more products to add or click the white ”Save” button if you are done adding products.

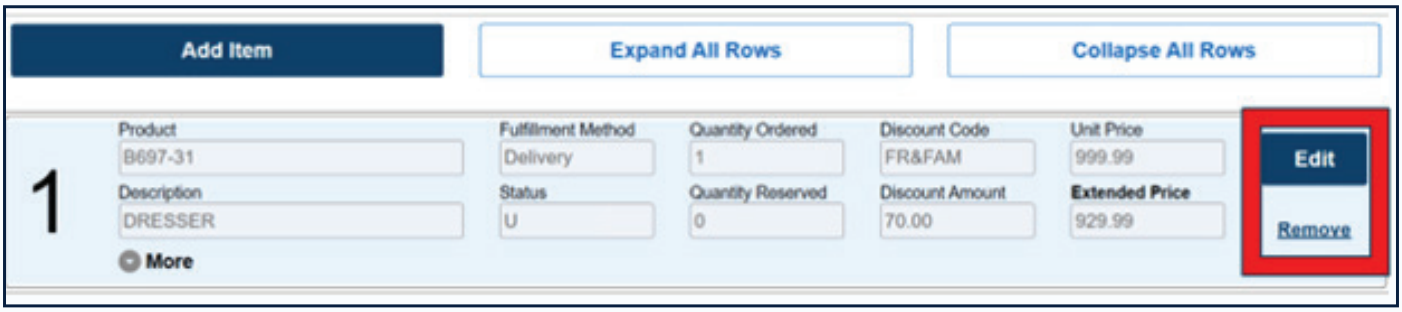


- **Step 4** - If you need to add further products after clicking on the white “Save” button, you can use the blue “Add Item” button to bring up the product sku field to add more products



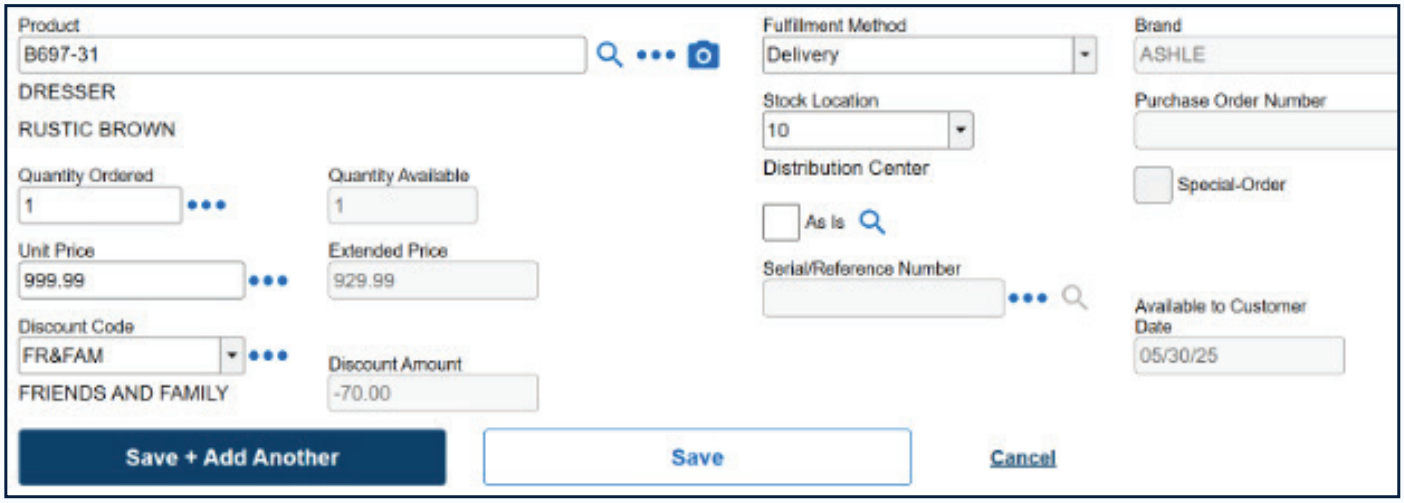
- **Step 5** - If you need to edit a product to adjust quantity, discount, fulfillment method, and/or stock location, just click the Edit button. If you added to many products or need to remove a product click





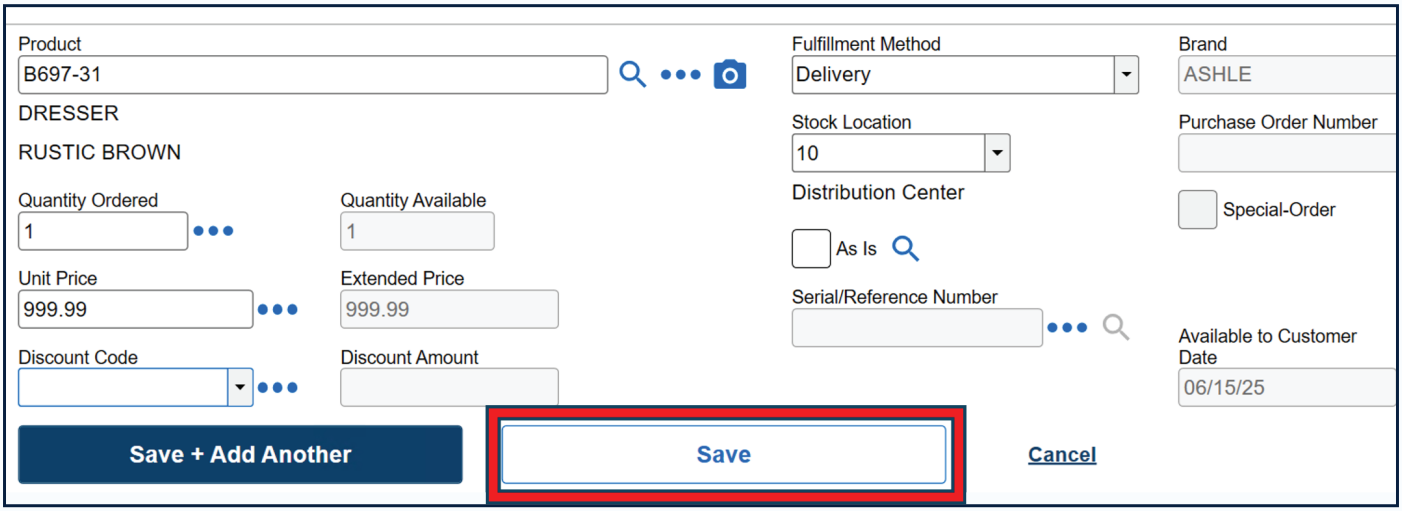
Part 3: Merchandise Step – Adding Skus Practice

- **Step 1** - Enter the following sku into the “Product” field and hit the Tab key (B697-31)

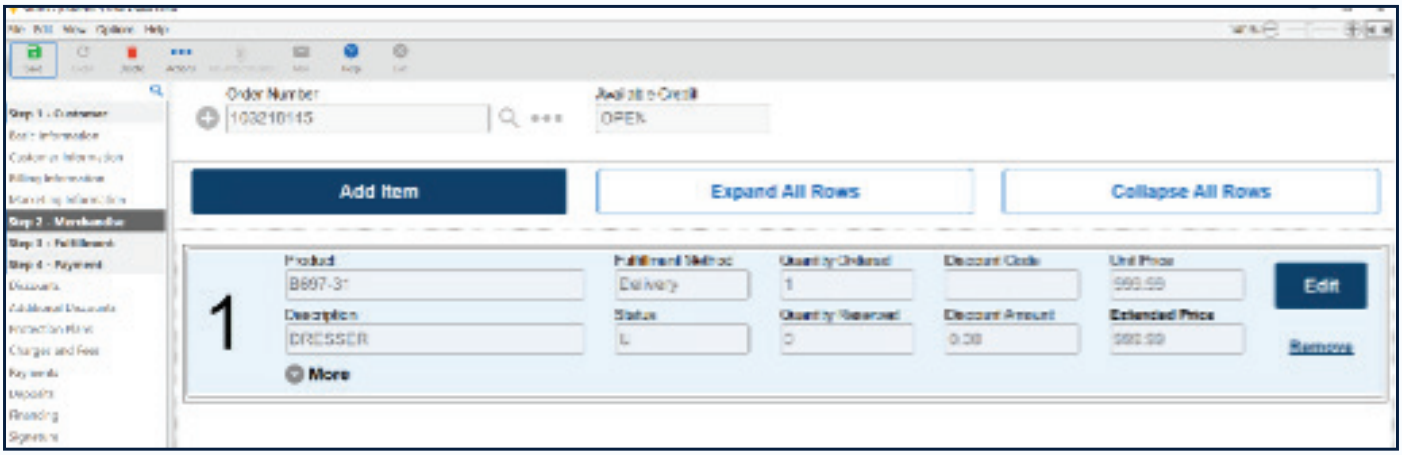


STORIS ORDER ENTRY – MERCHANDISE STEP (cont.)

- **Step 2** - Click on the white “Save” button to add the sku to the order

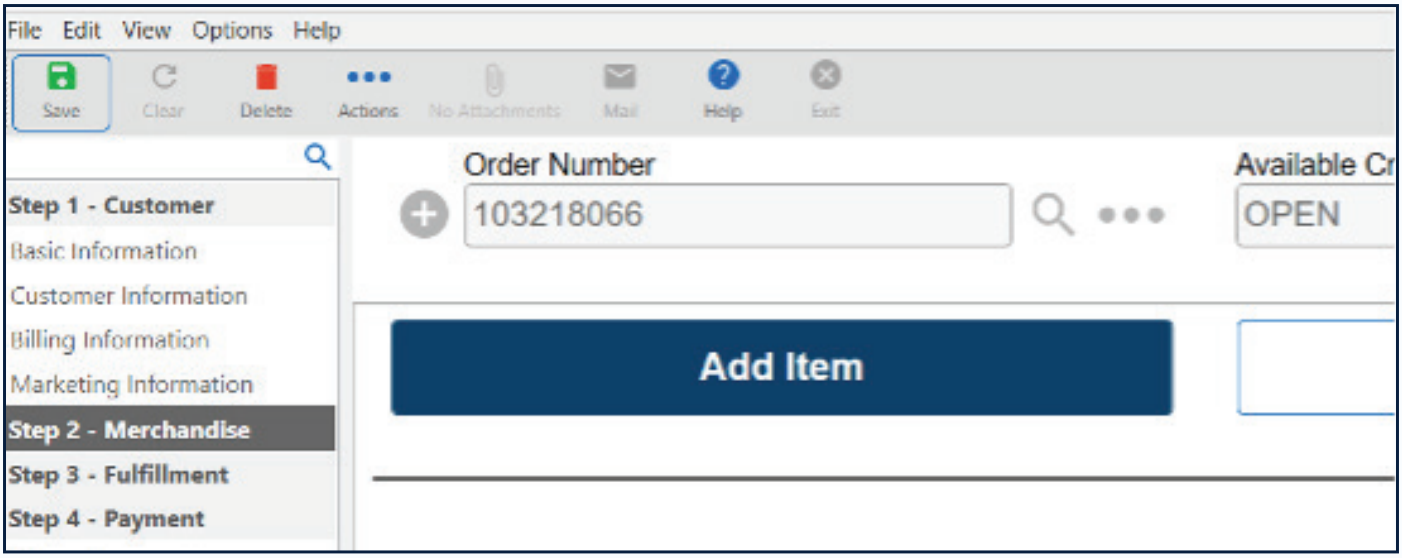


- **Step 3** - Verify your screen looks like this:

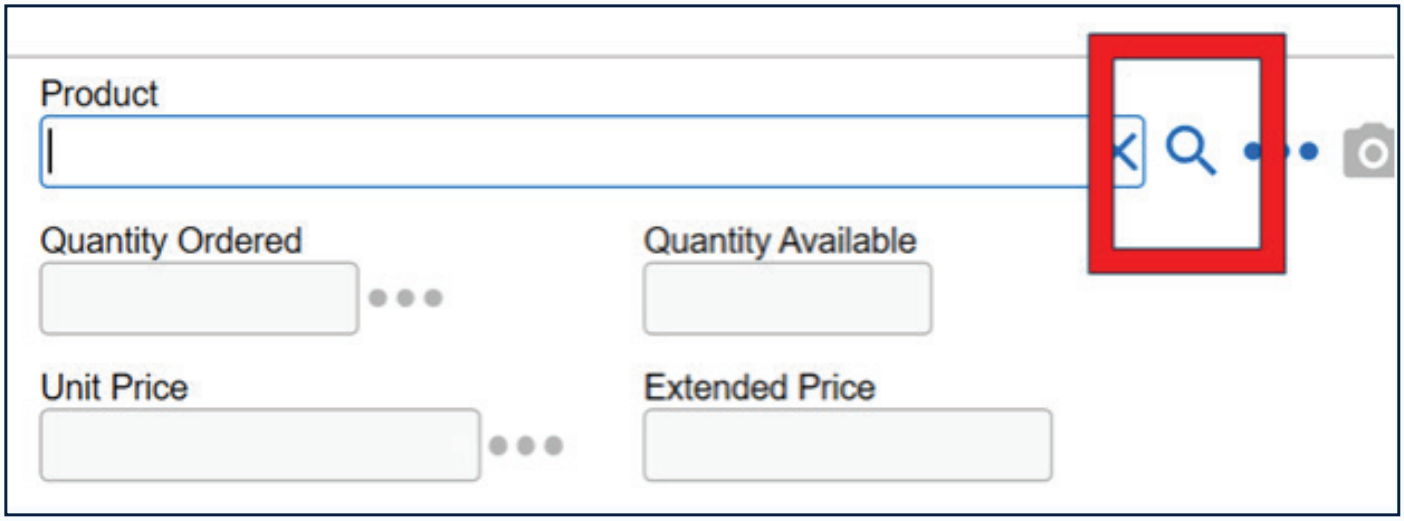


Part 4: Merchandise Step – Searching for Products

- **Step 1** - While on the Merchandise Screen of an order click on the blue “Add Item” button



- **Step 2** - Click the magnifying glass next to the search field under Product



- **Step 3** - – Use the "General Information" fields to narrow down your search for the product you would like. Below is a brief explanation of each search field:

Product – Use a part of a sku to find all skus that contain that sku part

Description – Use words to search for skus

Brand – Use the brand name to find products from that brand

Vendor Model – Used to find vendor specific skus

Vendor – Use Vendor name to find products from that Vendor

Collection – Use product name from the vendor to find all skus in that product family

Product Category – Searching a category of products e.g living room, dining room, bedroom, etc...

Product Group – Specially created product groups made by our purchasing department

Purchase Status - Use single letter:

A – Active: can still order

D – Dropped: could still be ordered but we no longer floor the product

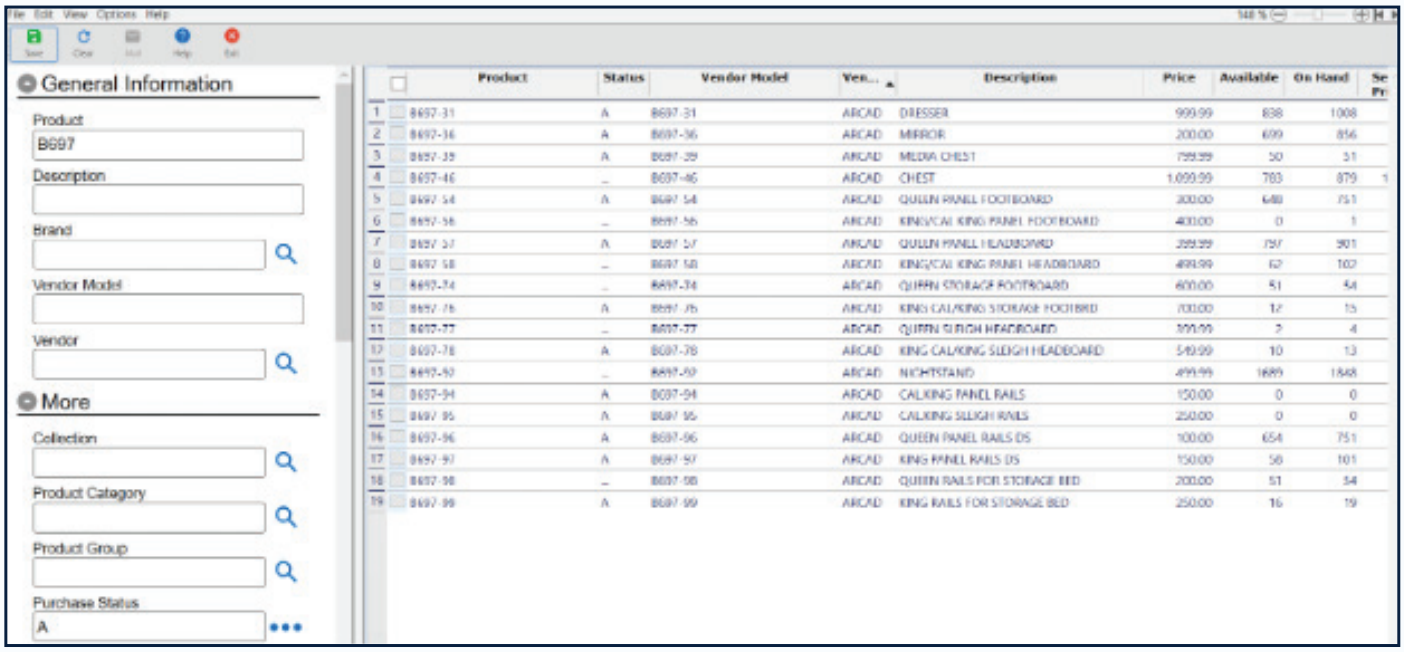
T – Discontinued: can no longer order, the manufacturer no longer makes

Availability Location – Use this to search for a sku at a certain company store location

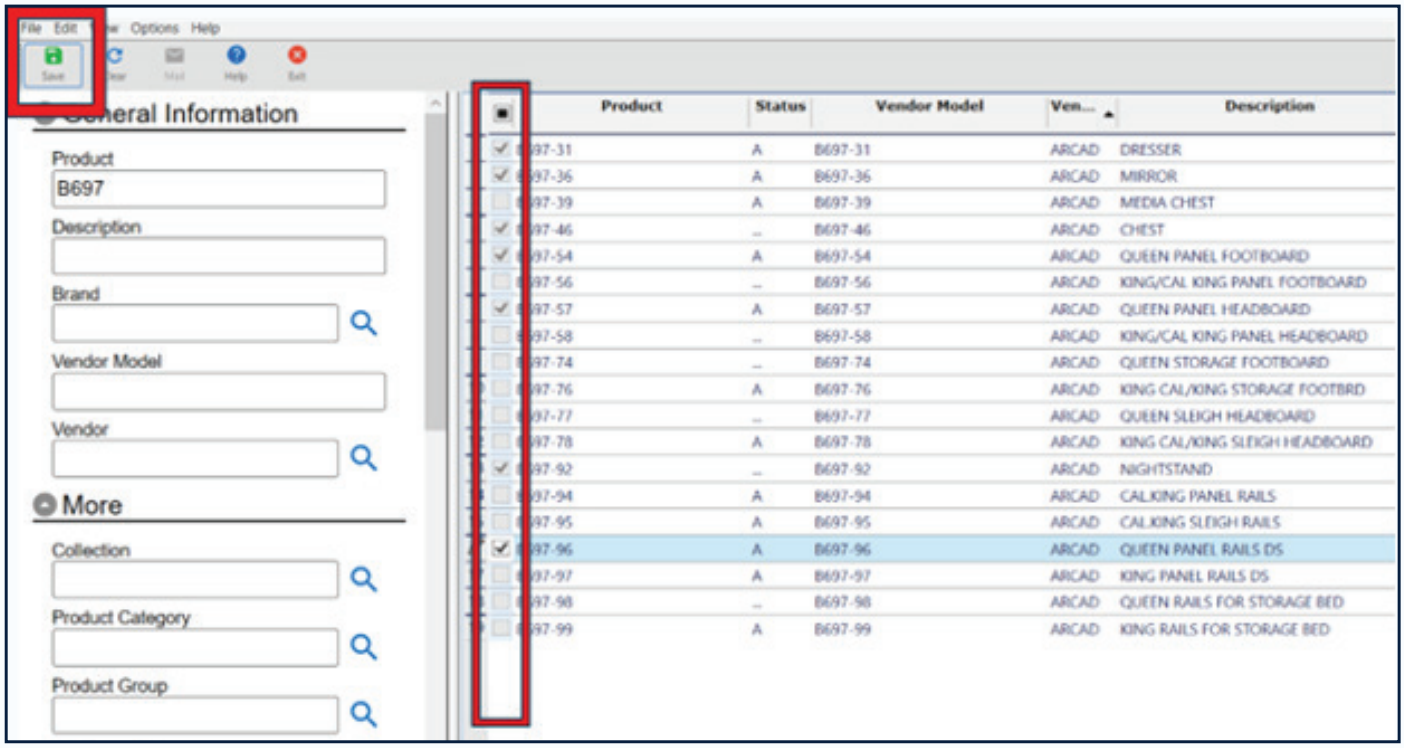
Price Range – Search from lowest to highest price point

STORIS ORDER ENTRY – MERCHANDISE STEP (cont.)

Special Note: For the majority of the time searching by part of a sku using the product search field will be most common. Typically you can type the first few characters of a sku and this will bring up all related skus from that collection/family. See below example:



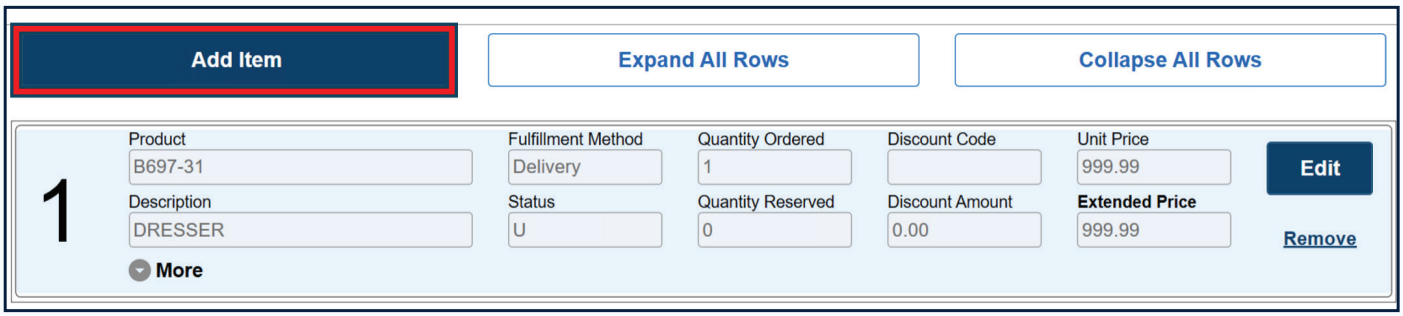
- **Step 4** - To add multiple products to a guest's order simply check the boxes in front of the skus you want to add and click the green Save icon in the upper left corner



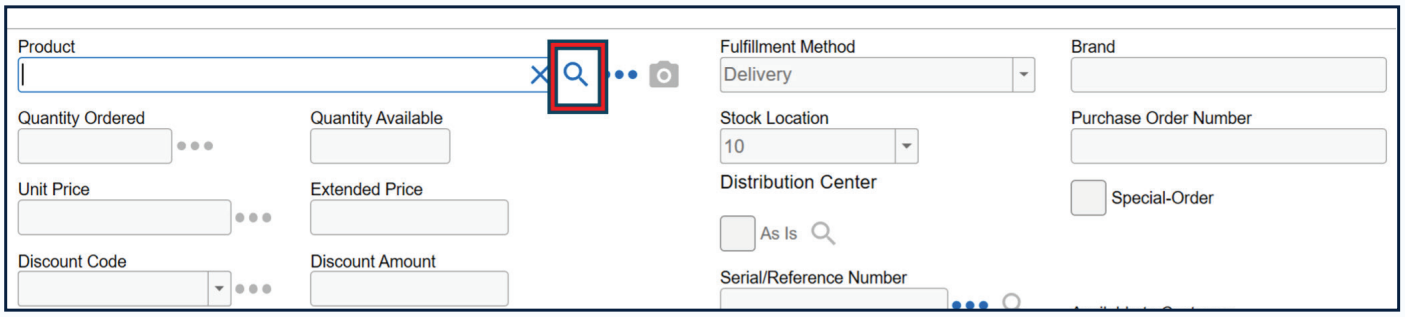
- **Step 5** - After clicking the Save icon each item will appear individually allowing you to change quantity, discount, fulfillment method, and stock location. Click the Blue or White Save icon to add each item.

Part 5: Merchandise Step – Searching for Adding Skus Practice

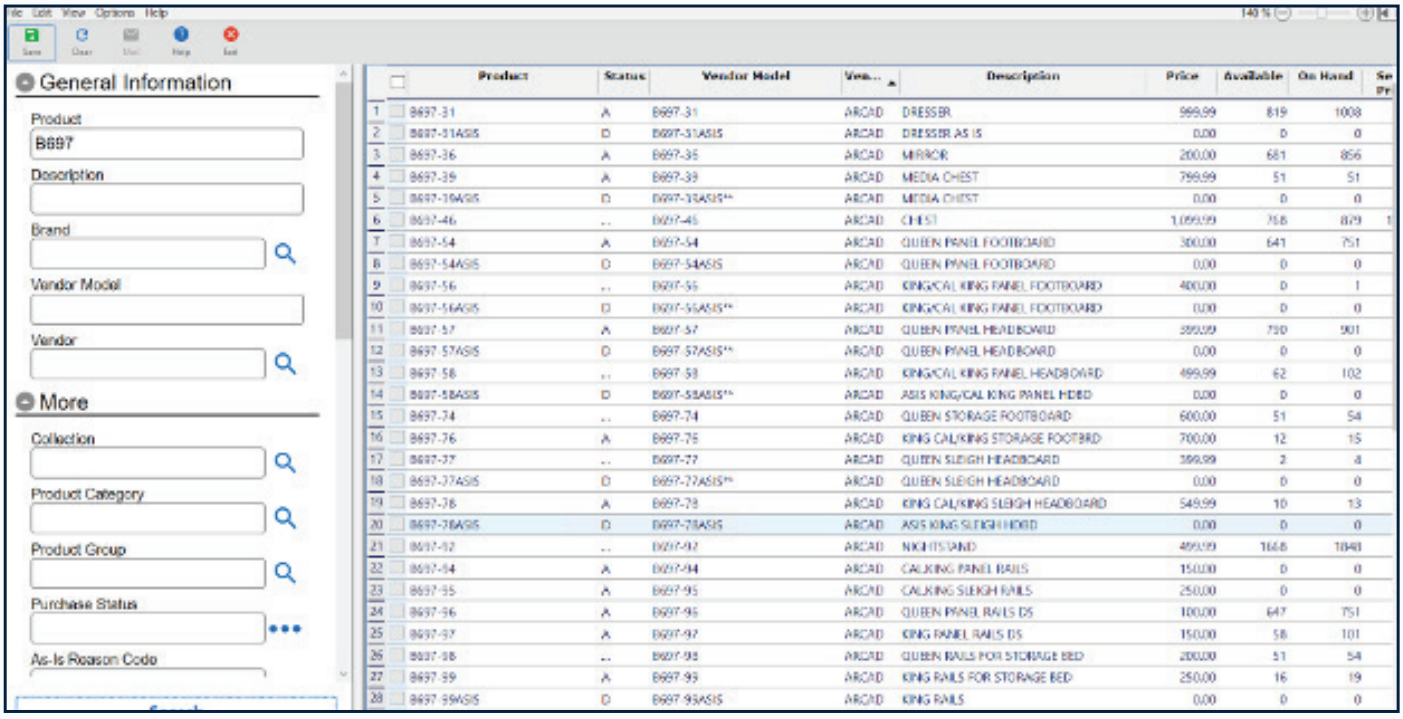
- **Step 1** -Click on the blue “Add Item” button



- **Step 2** - Click on the blue magnifying glass icon

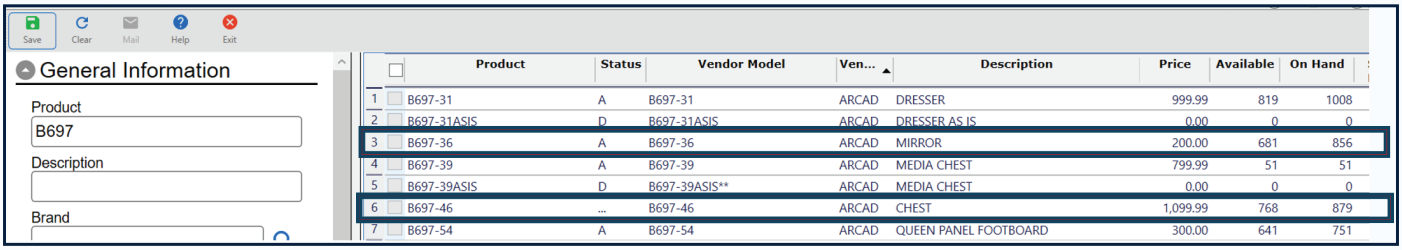


- **Step 3** - Enter “B697” into the Product field and click search or hit the Enter key

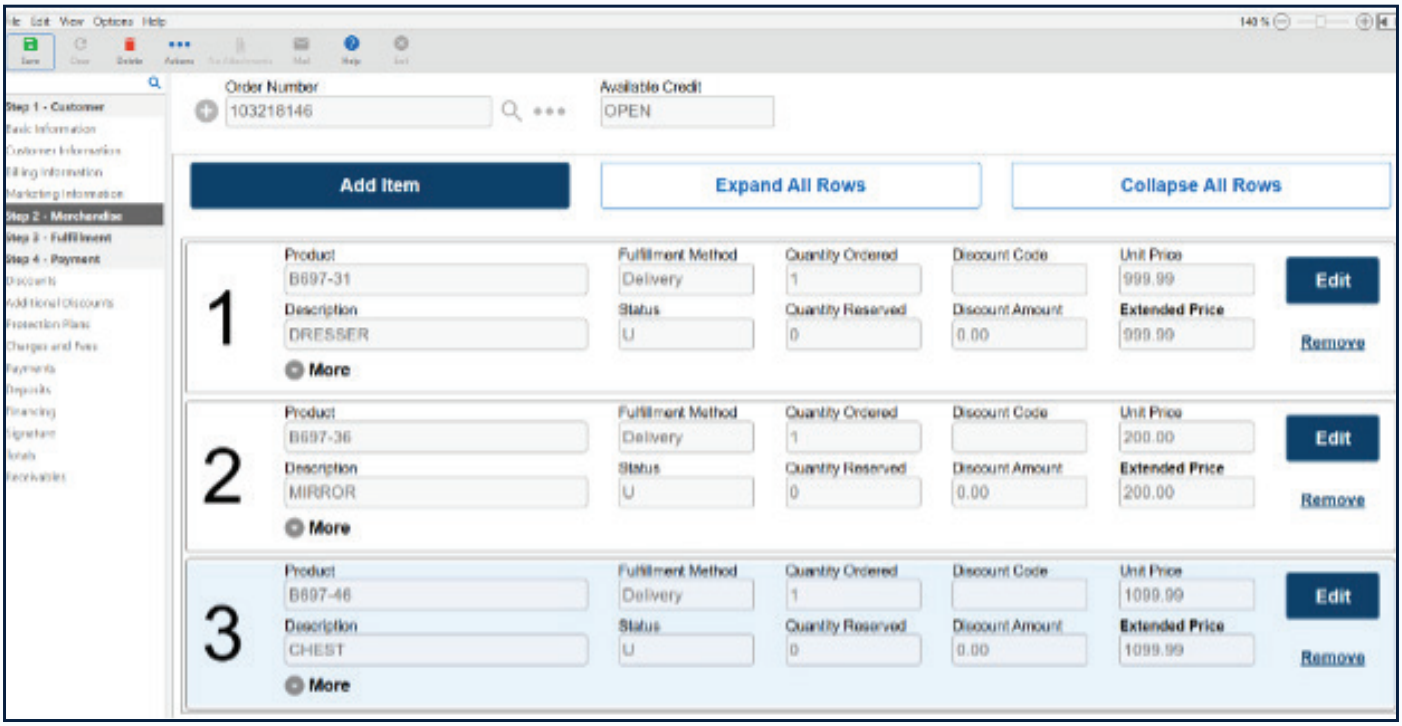


STORIS ORDER ENTRY – MERCHANDISE STEP (cont.)

- **Step 4** - Check the box next to the following items and then click the green floppy disk to add those items to the order:
  - B697-36
  - B697-46



- **Step 5** - Click the white “Save” button to add each item to the order and verify your screen looks like this:



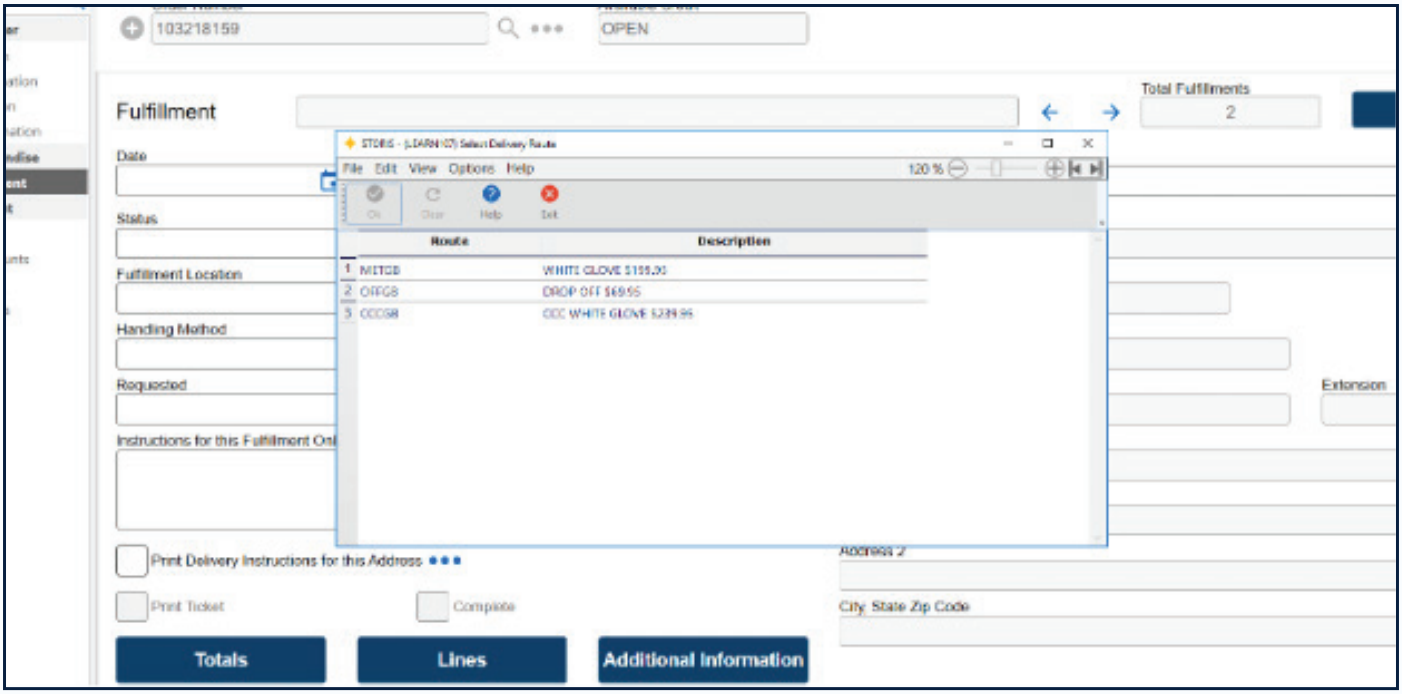
STORIS ORDER ENTRY – FULFILLMENT STEP OVERVIEW

The Fulfillment Step controls the processes of how our customer's are going to receive their products. Below is a brief list of the main functions of the fulfillment step:

- Schedule deliveries/pick ups
- Control where product is being sent
- Alter or add delivery addresses
- Leave notes for our delivery crews

Part 1: Fulfillment Step – Choosing Delivery Option

- **Step 1** - Click on "Step 3 – Fulfillment Step
- **Step 2** - Double click on the type of delivery your guest wants

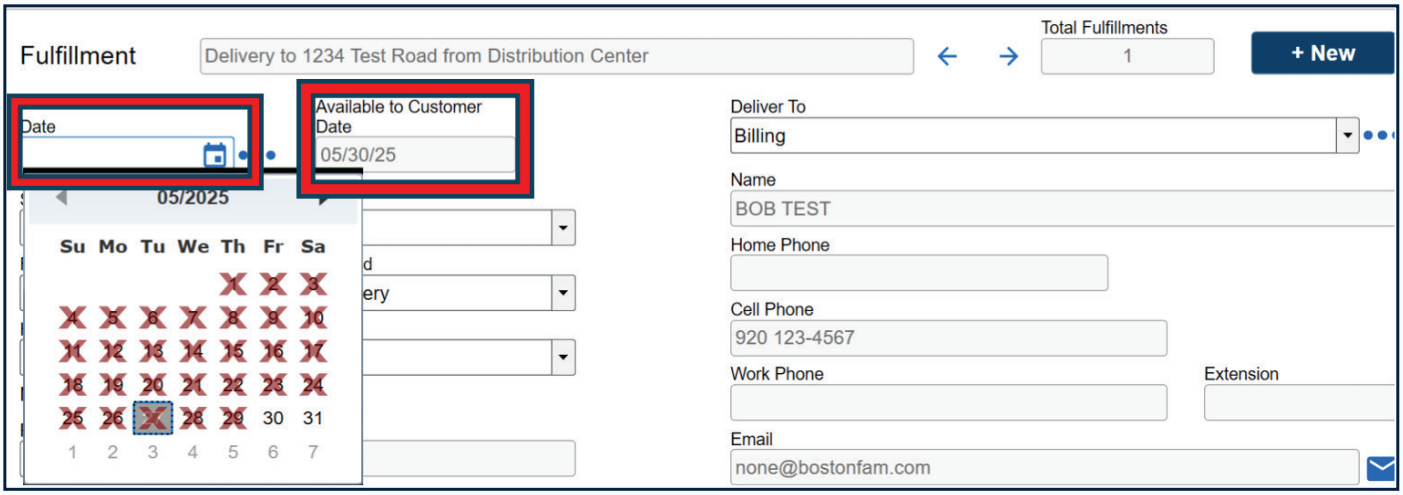


- **METGB: $199 local full service delivery**
- **OFFGB: $69 local in box drop off**
- **CCCGB: $229 clearance full service delivery**

STORIS ORDER ENTRY – FULFILLMENT STEP OVERVIEW

Part 2: Fulfillment Step – Choosing Delivery/Pick Up Option and Scheduling

- **Step 1** - Click on the blue calendar icon under the word Fulfillment and select a date after the “Available to Customer Date” to the right.

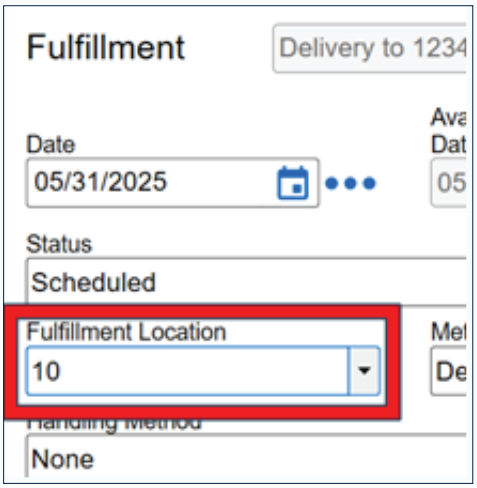


- **Step 2** - Note that after selecting the correct date Storis will update the plain English explanation of the fulfillment next to the word “Fulfillment”



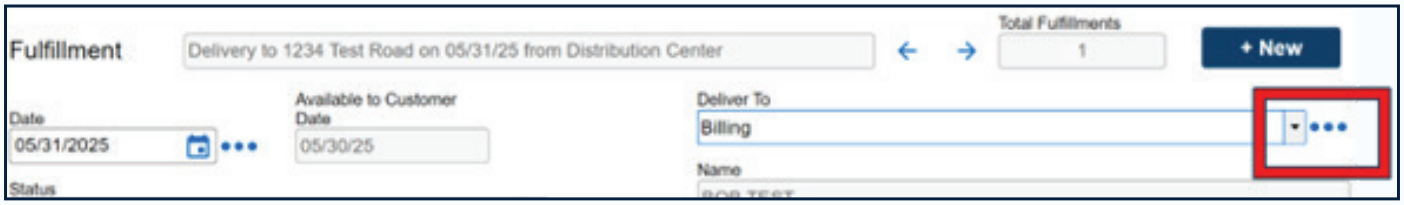
Part 3: Fulfillment Step – Fulfillment Locations and Delivery Address

- **Step 1** - Ensure your fulfillment location is correct:
  - Delivery/Drop-Off = 10
  - Pickup = Your store or store warehouse



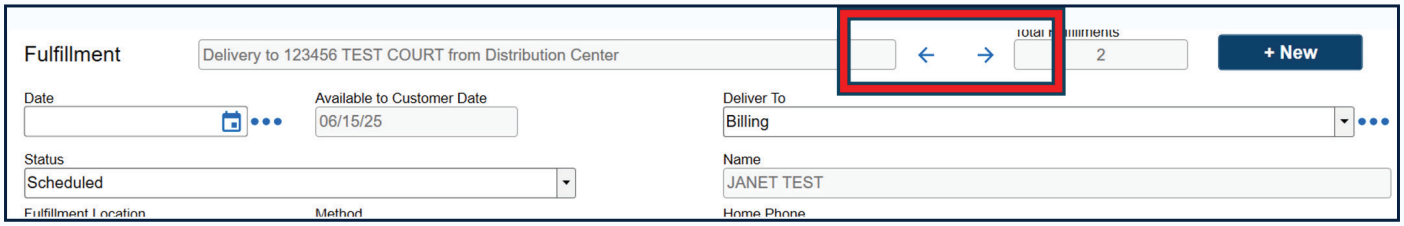
Note: The fulfillment location is where you want the product to be sent for pick up. As above all deliveries should be set to location 10, while pick ups should come for your store/warehouse.

- **Step 2** - If you need to add or alter the delivery address you can click the three blue dots to the right side of the screen. Simply click the green save icon after the needed changes.



Part 4: Fulfillment Step – Moving between Fulfillments and Leaving Delivery notes

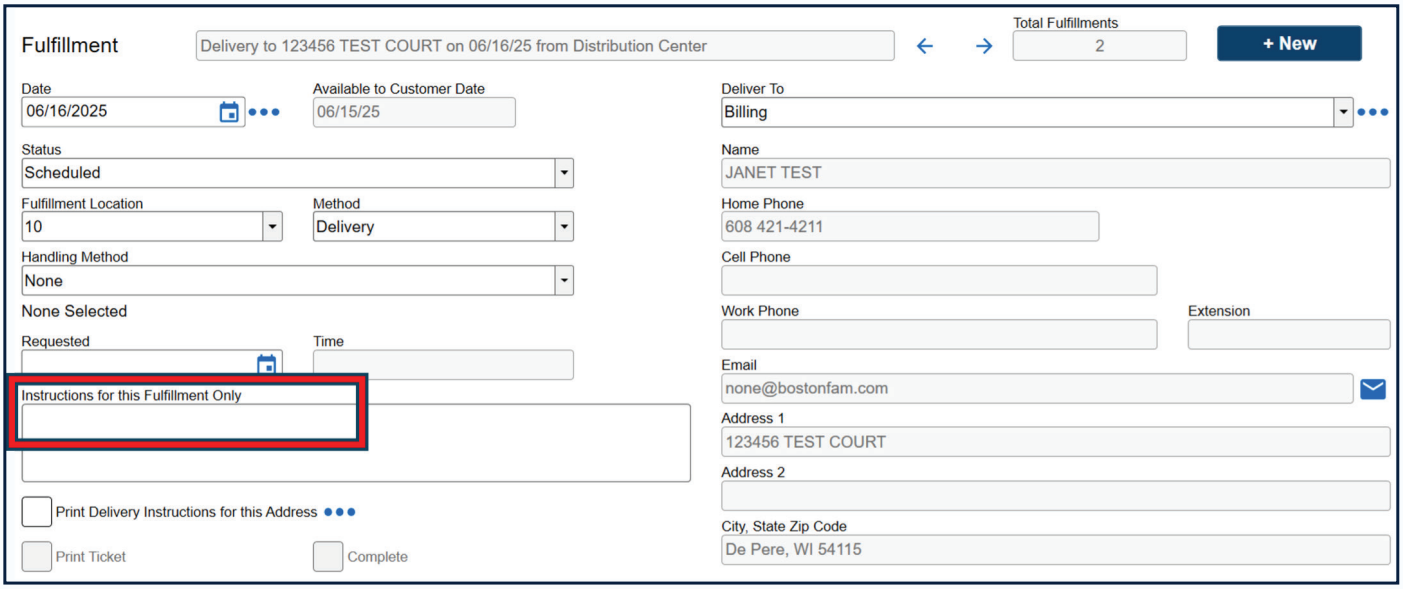
- **Step 1** - If there is more than one delivery or a delivery & pick up use the blue arrows to the left of "Total Fulfillment" to move back and forth. Ensure all deliveries and pickups are scheduled using the blue calendar and they have the correct fulfillment locations.



Note: Customer's cannot request specific time frames for delivery. Our CX team will reach out to the guest three days prior to delivery with a text, call, and email for the guest to confirm their delivery. Once the guest confirms their delivery a tracking link will be sent indicating a rough time of day. The day of delivery the customer may track their delivery crew as they go about their day with an exact time of arrival on the link.

STORIS ORDER ENTRY – FULFILLMENT STEP OVERVIEW (cont.)

- **Step 2** - Near the bottom of the Fulfillment step screen is an area labelled “Instructions for this Fulfillment Only”.



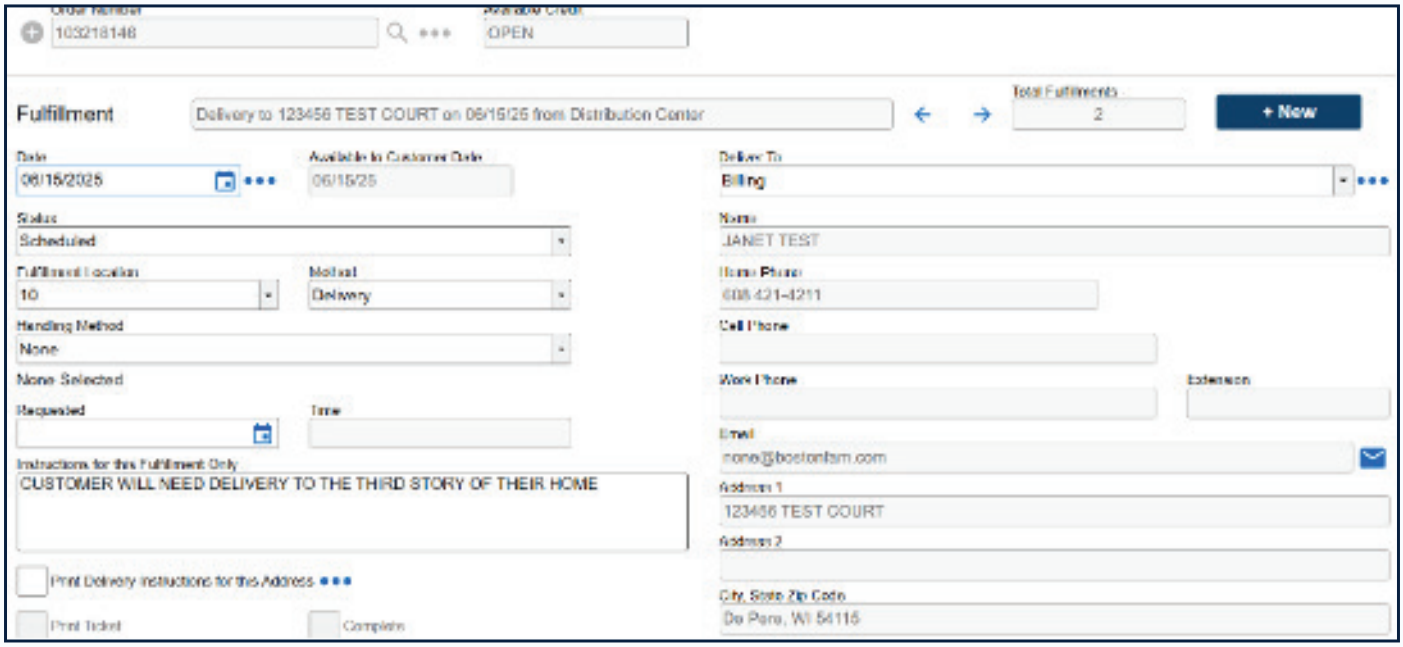
This area is used to record any notes that the delivery crew would want to know about. A few examples are:

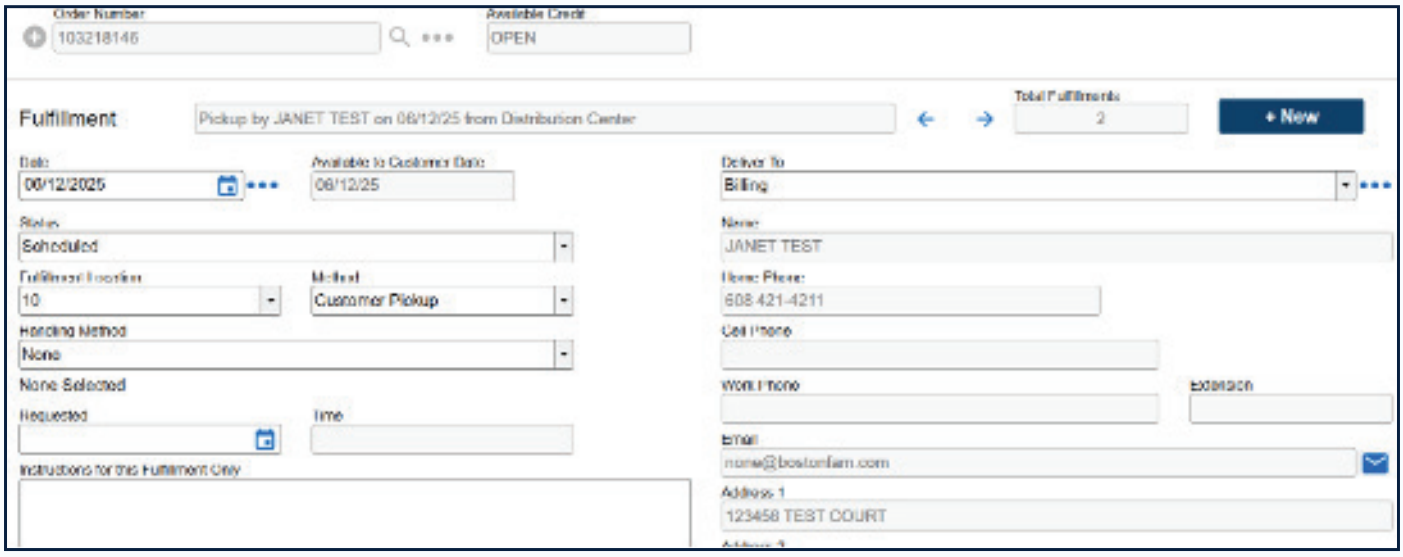
- **A special area to park**
- **A certain floor the products need to be delivered to**
- **A specific person needed to talk to for coordinating delivery**
- **Use of an elevator for delivery**

Note: It is very important to leave detailed notes in this field as our routing department reads these notes and then allocates the appropriate amount of time for the delivery. A lack of notes may lead to poor customer experiences and delays for other customers receiving delivery that day.

Part 5: Fulfillment Step Practice

- **Step 1** - Schedule the delivery for the next available date
- **Step 2** - Use the blue arrows next to “Total Fulfillments” to move to the pickup, and schedule it for the next available date
- **Step 3** - Leave a note in your delivery that the guest will need delivery to the third story of their home
- **Step 4** - Verify your screen looks like below and click on Step 4 – Payment Step when complete





STORIS ORDER ENTRY – PAYMENT STEP OVERVIEW

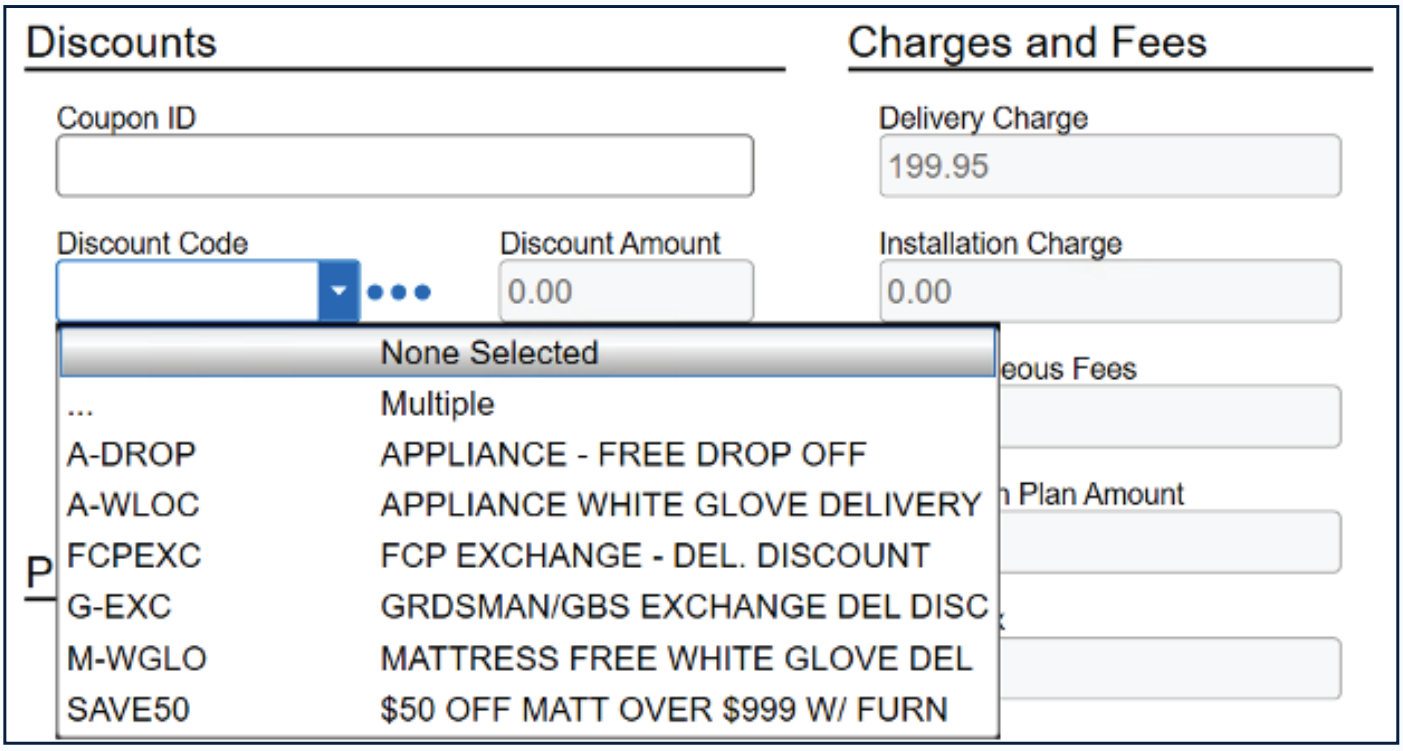
The Payment Step has only four main functions:

- **Applying special discount codes for delivery**
- **Taking Direct payments like cash, check, and card**
- **Entering financing codes for our different financing terms**
- **Printing and Emailing the completed order**

We will now break down each of these main functions and practice entering a direct deposit

Part 1: Payment Step - Discount Codes

- **Step 1** - Click on the Discount Code drop down and view the options.



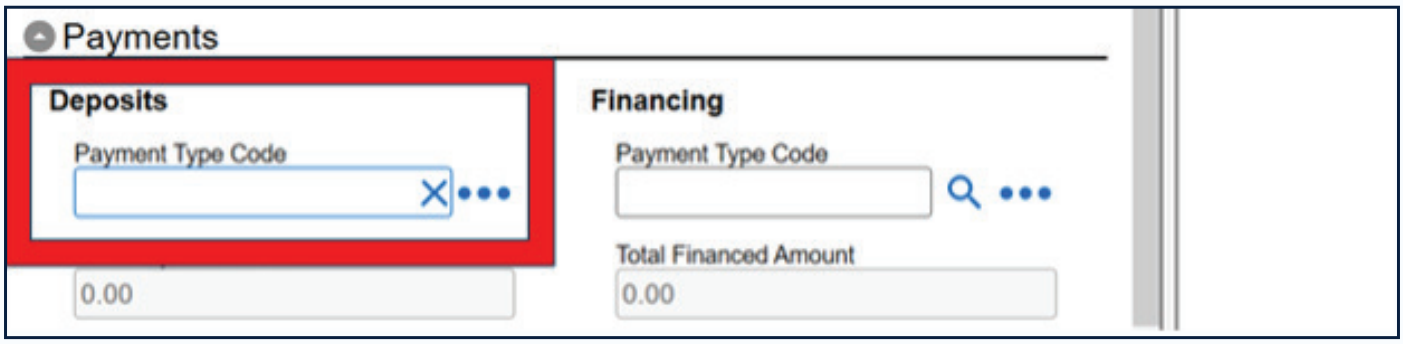
See below for an explanation on each:

- **A-Drop – Free appliance drop off**
- **A-WLOC -**
- **FCPEXC – Applies a discount of $199.95 for exchanges through our FCP program**
- **G-EXC – No longer in use, ignore**
- **M-WGLO – When a guest purchases a mattress over $999 they get free white glove delivery. This applies a discount of $199.95.**
- **SAVE50 – If a guest purchases a mattress over $999 and other furniture they receive a $50 discount**

Part 1: Payment Step - Direct Deposits

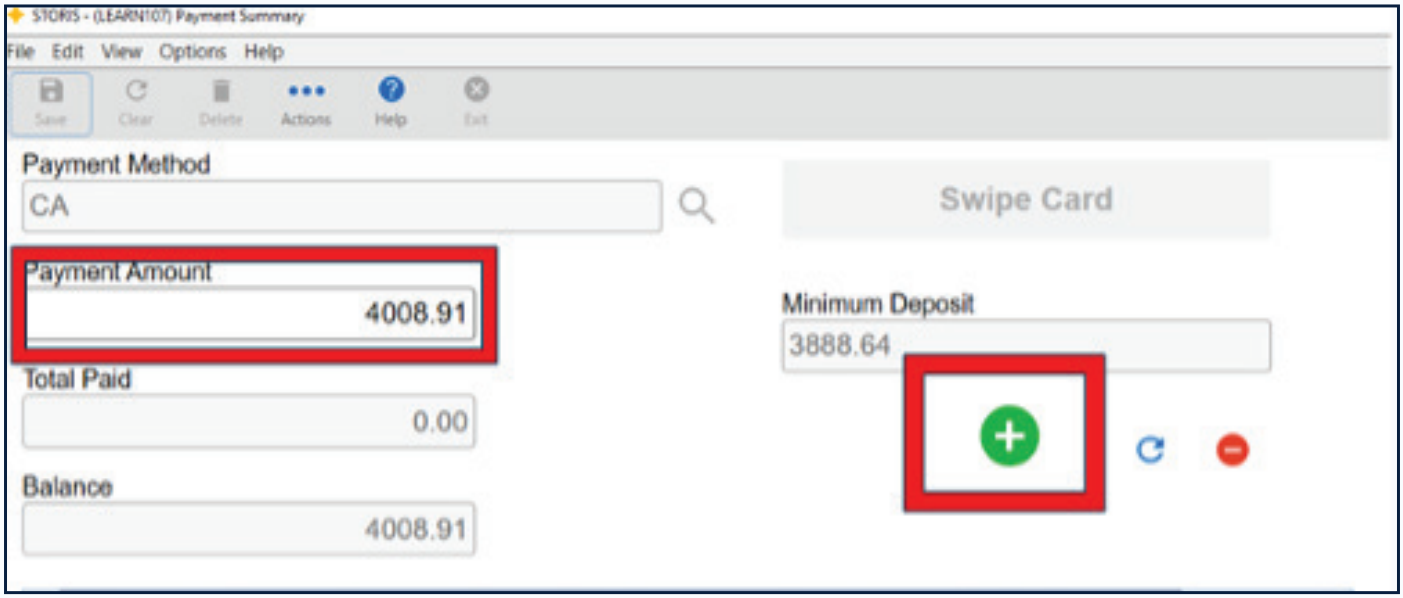
- **Step 1** - Close the drop down without selecting an option and look down to the “Direct Deposits” area of the screen. If the guest is using cash, check, or card type in the two letter payment code in the ”Payment Type Code” under Deposits:

- **Cash = CA**
- **Check = CK**
- **Visa = VI**
- **Mastercard = MC**
- **Discover = DI**
- **American Express = AE**



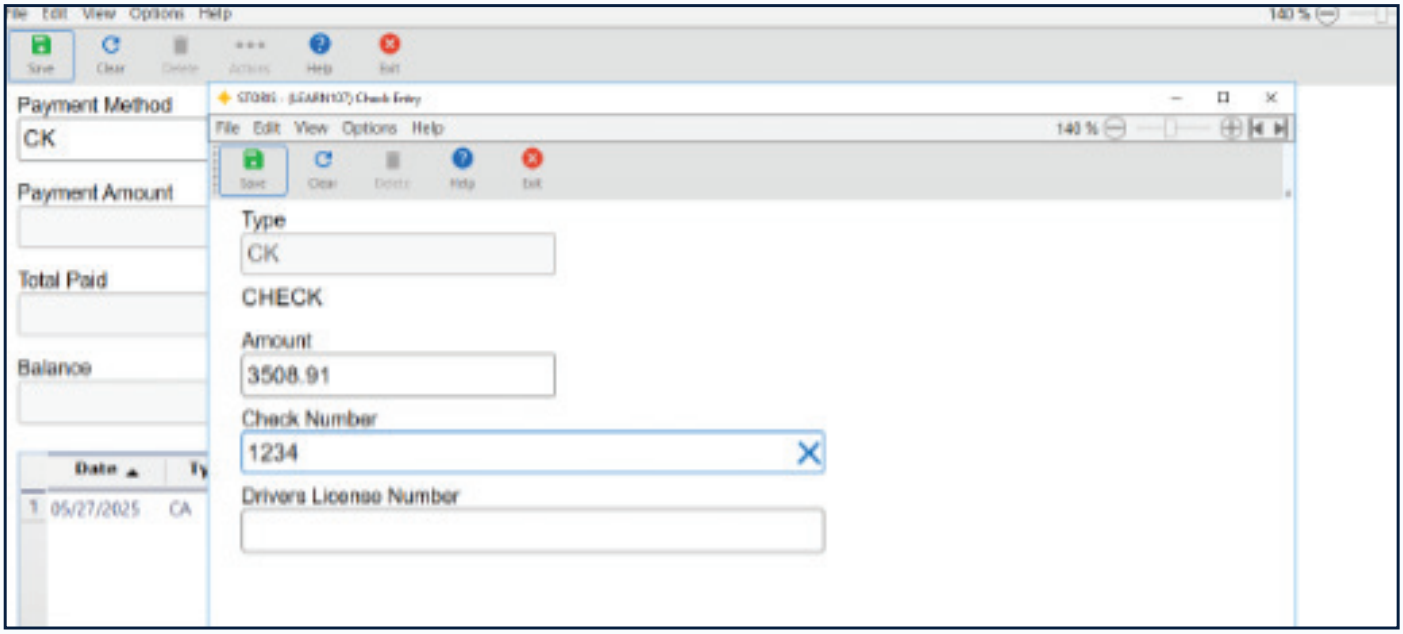
- **Step 2** - Below we will review what is needed for each from of Deposit above:

Cash – A double count of all cash must be made by an office professional. Type in the two letter code CA in the “Payment Method” field and hit the tab key. Enter the desired payment amount in the “Payment Amount” field and then click the green plus Icon to add the payment.

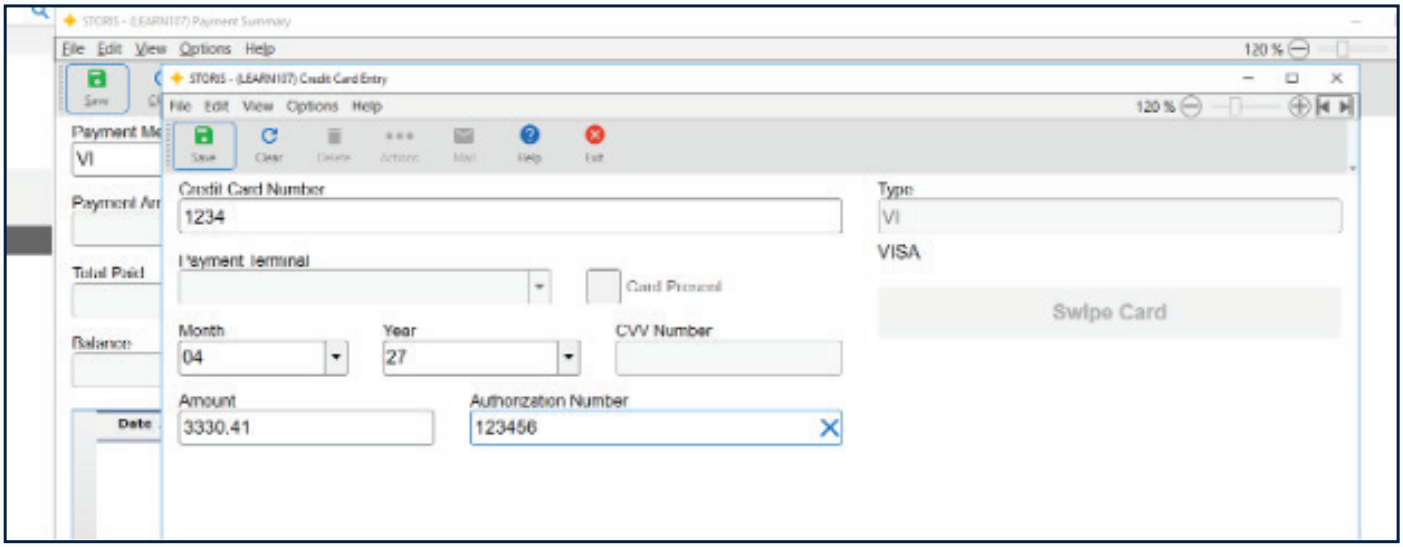


STORIS ORDER ENTRY – PAYMENT STEP OVERVIEW (cont.)

Check – Checks must be brought to an office professional to be check for authenticity. Type in the two letter code CK in the "Payment Method" field and hit the tab key. Enter the check number in the "Check Number" field and then enter the guest's drivers license number in the corresponding field.

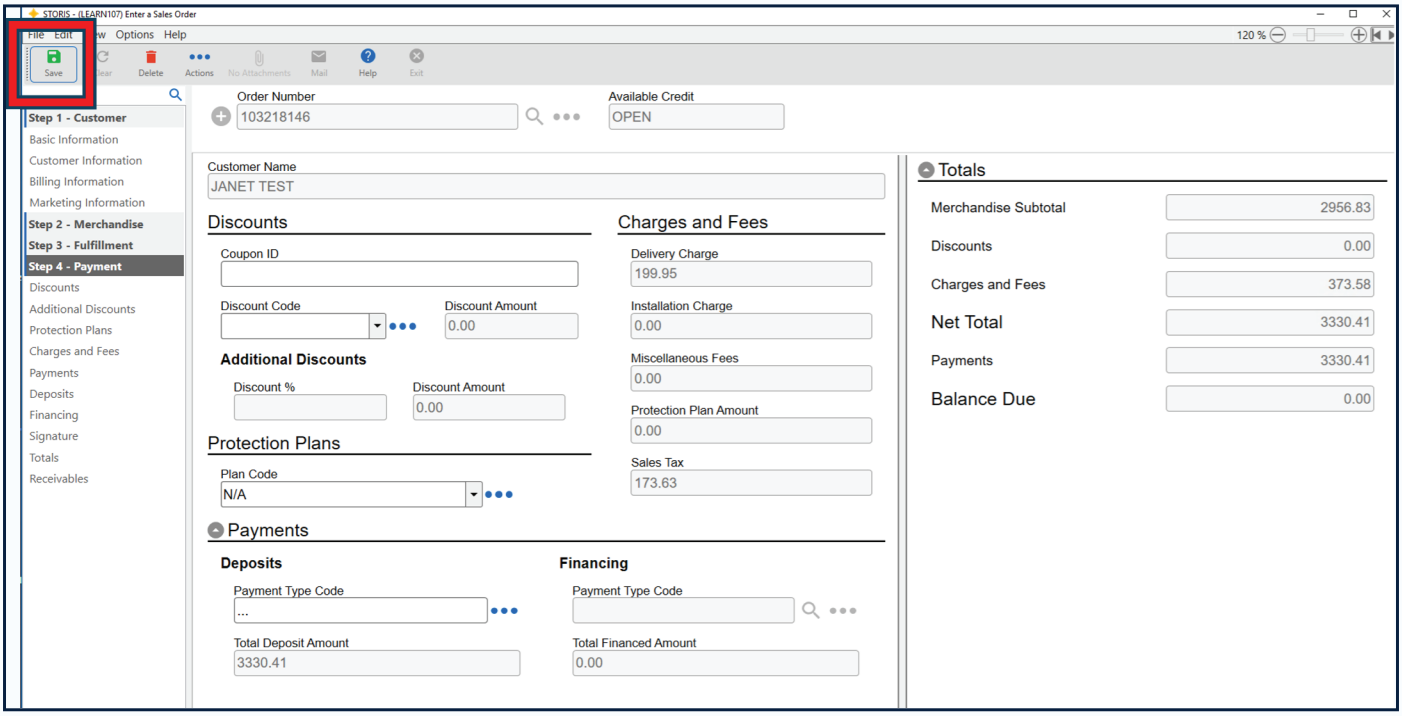


Card – Cards can be processed by room consultants using the credit card terminals. Type in the "Payment Method" field VI, MC, DI, or AE and hit tab. Enter only the last 4 digits of the credit card into the "Card Number" field, leave the CC field blank, record the expiration date information, and finally enter in the Authorization number in its respective field. You can find the Auth # at the top of the small paper receipt that comes out of the credit card terminal.

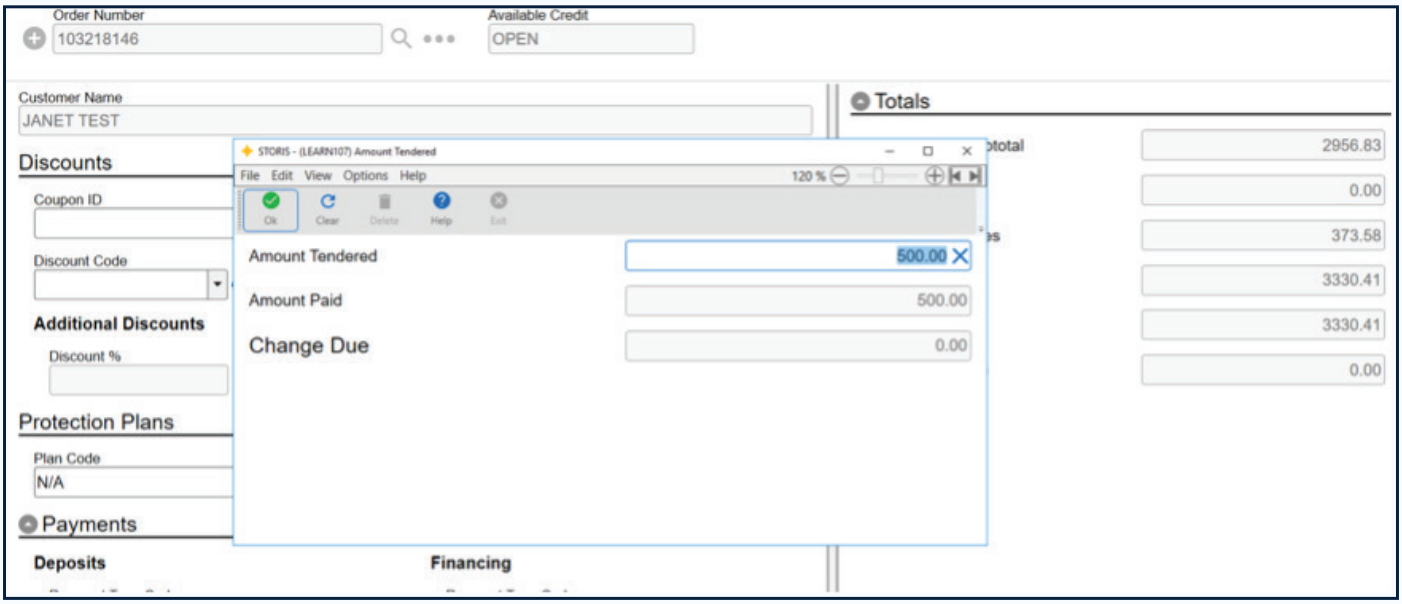


Part 4: Saving, Printing, and Emailing the Order

- **Step 1** - After entering payment until the balance is zero, click on the green floppy disk in the upper left hand corner.

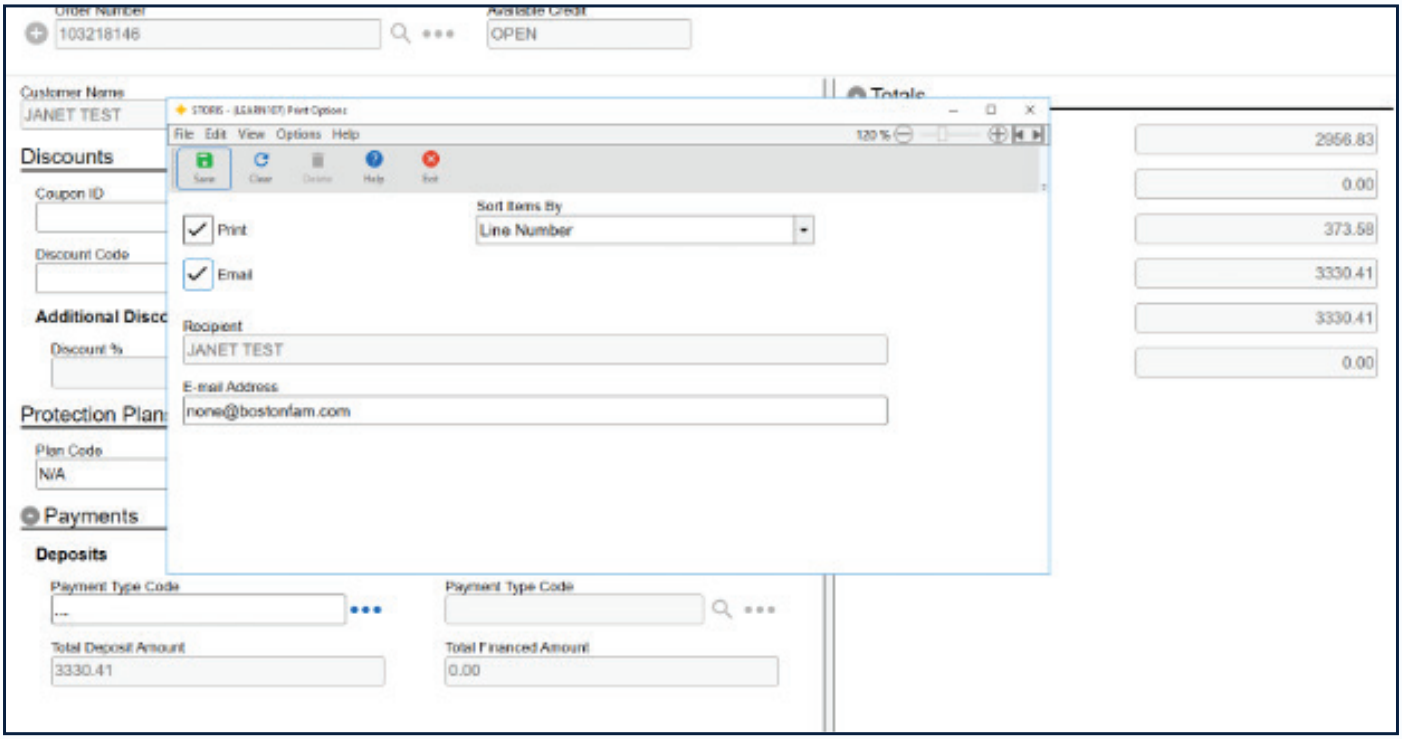


- **Step 2** - If you entered any cash payments pop-ups will appear verifying you received the cash and showing you any change due. Click on the green “Ok” button and then “OK”.

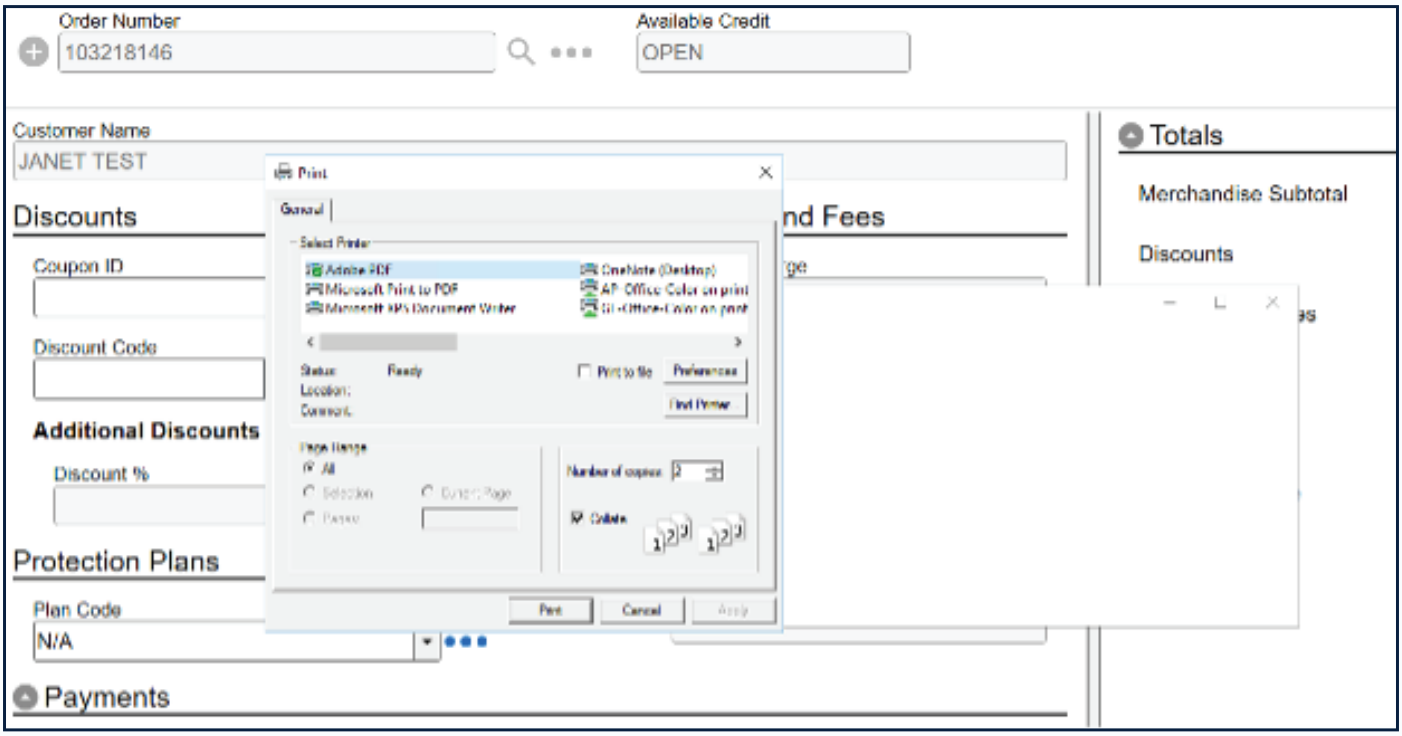


STORIS ORDER ENTRY – PAYMENT STEP OVERVIEW (cont.)

- **Step 3** - A pop-up labelled “Print Options” will appear with two checkboxes:
- Print
- Email

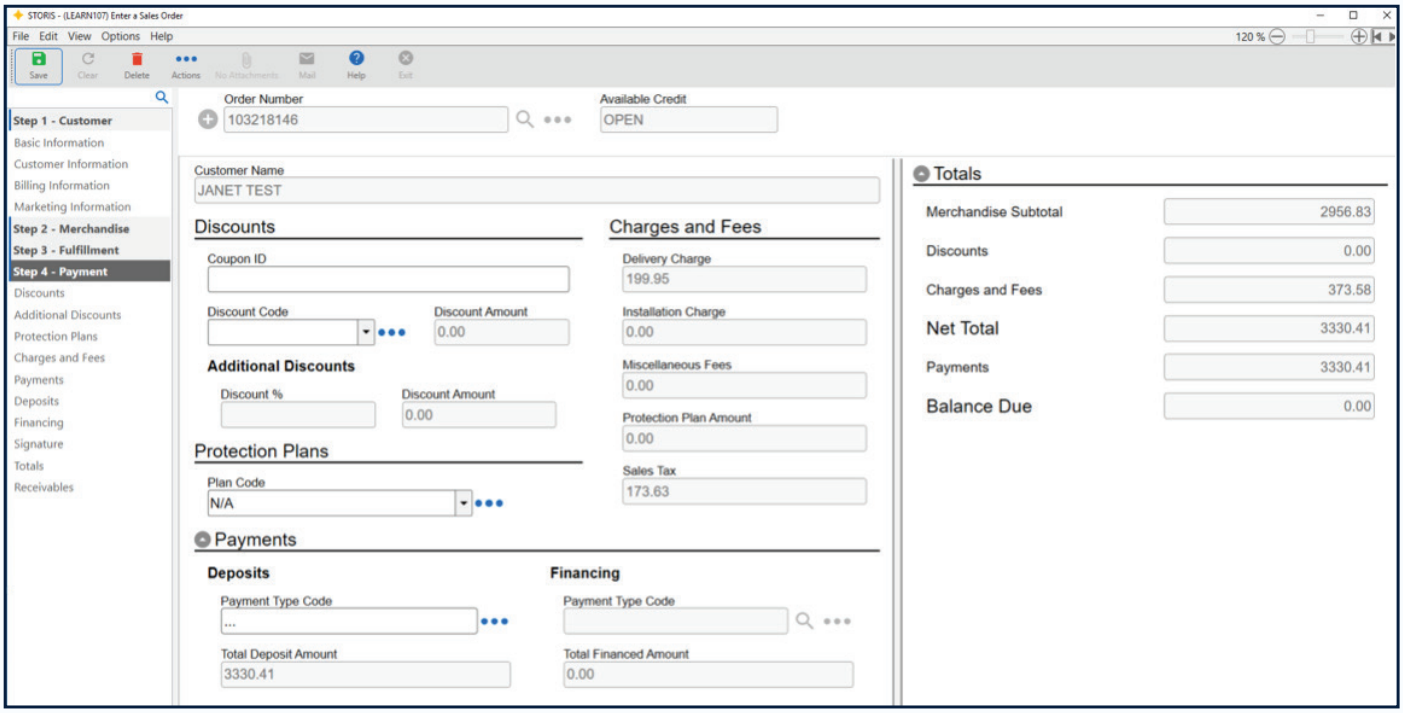


- **Step 4** - Once the appropriate checkboxes are checked click the green floppy disk save button to select the printer you want to print to and save the order.



Part 5: Fulfillment Step Practice

- **Step 1** - Click the discount code drop down and choose the SAVE50 code
- **Step 2** - Click on the “Payment Type Code” field under the word Deposits and enter the following payments:
- $500 cash payment
- $500 check payment with a check number of 4321
- Remaining balance on a visa
    - 1234
    - 04/27
    - Auth # 654321
- **Step 3** - Verify your screen looks like my screen:



- **Step 4** - Save through the order and return to the main “Enter a Sales Order” screen

