

## **53.4 PWS PartsWatch Phone Room Advanced User Guide R1.0**

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## 1. DOCUMENT INFORMATION

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### 1.1. Publication Record

Revision 1.0 is the current version of the *53.4 PWS PartsWatch Phone Room Advanced User Guide*.

Rev.	Publication Date	Author Name	Description of Revisions
1.0	10/25/2016	Cathy Kuhlmann	Initial Publication

The graphics illustrated in this document represent a sample design.

Numbers, currency, dates, and times in this document are written in English (United States) format; however, the application supports other languages and formats for numbers, times, and dates.

## 2. PHONE ROOM FUNCTIONALITY

### 2.1. Employee and Terminal Phone Room Functionality Differences

There are two types of Phone Room functionality.

1. **Terminal Phone Room** – Phone Room functionality that is set up on the terminal level. This functionality allows any employee on a designated phone room terminal to access phone room functionality without being able to invoice regular sales and returns. Accounts are assigned to phone room locations, but can be changed per phone room ticket.
2. **Employee Phone Room** – Phone Room functionality that is set up on the employee level. This functionality enables the counterperson with phone room capabilities to take phone room calls as well as invoice regular sales and returns. The Phone Room functionality is not tied to a terminal and, instead, is tied to the employee. Any account can be a phone room account and the phone room employee determines whether to create a phone room ticket for another store before adding items to it, or to create the ticket in his store as a regular sale or return.

#### Terminal and Employee Phone Room Functionality Comparison

	Terminal Phone Room	Employee Phone Room
1	Enterprise control must be set to enable Terminal Phone Room.	Enterprise control must be set to enable Employee Phone Room.
2	N/A	PHONE ROOM REP flag must be checked per employee using Phone Room functionality.
3	PHONE ROOM TERMINAL flag must be checked in TERMINAL SETUP screen per terminal or PHONE ROOM LOCATION flag must be checked in STORE INFORMATION screen for all terminals. Phone Room functionality is available to all users from enabled terminals.	PHONE ROOM TERMINAL flag must be checked in the TERMINAL SETUP screen per terminal or PHONE ROOM LOCATION flag must be checked in STORE INFORMATION screen for all terminals. Phone Room functionality is not tied to a terminal but rather a user even though the flag must be checked.
4	User accesses the INVOICE screen and enters a customer, which is validated in Store/Store Group for current store.	User accesses the INVOICE screen and enters a customer, which is validated in Store/ Store Group for current store.
5	System changes account to account's PHONE ROOM STORE. If account's PHONE ROOM STORE is ALL, the user is prompted to select a location.	A PHONE ROOM button displays to optionally use Phone Room functionality. Click the PHONE ROOM button to display the SELECT PHONE ROOM LOCATION window to select the location. If the account's PHONE ROOM LOCATION is other than ALL, the location is highlighted in window. Only locations in the user's Store Group/Default Location shows in the window.
6	Account displays in the INVOICE screen in Account's PHONE ROOM STORE or selected store and is validated in Store/Store Group for current store.	Account displays in the INVOICE screen in selected store and is validated in Store/Store Group for current store.

	Terminal Phone Room	Employee Phone Room
7	User sells parts in selected store.	User sells parts in selected store.
8	The CHANGE STORE BUTTON displays rather than the DEFAULT PRINTER button and is available to change locations before adding items to ticket.	The PHONE ROOM button displays to optionally use and is available to change locations before adding items to a ticket.
9	Items are added to the invoice, allocating inventory from the current/active POS (virtual) store.	Items are added to the invoice, allocating inventory from the current/active POS (virtual) store.
10	The standard POS action buttons, such as QUOTE/PICK/PACK/INVOICE, are used to queue the invoice to be printed by the background processor.	<p>The standard POS action buttons, such as QUOTE/PICK/PACK/INVOICE, are used to process/tender/print the ticket if this is not a phone room transaction.</p> <p>If this is a phone room transaction, the user clicks the PHONE ROOM button. A pop-up displays allowing the appropriate POS action button, such as QUOTE/PICK/PACK/INVOICE, to be clicked to queue the invoice to be printed by the background processor.</p> <p><b>Note:</b> The PHONE ROOM button in the INVOICE screen serves two (2) purposes depending on when it is clicked. (1) If clicked before any items are added to the invoice, the store number can be selected for the transaction so inventory is allocated from the appropriate location. (2) If clicked after items are added to the invoice, the ticket can be queued for printing by the background processor at the physical location.</p>
11	Once the ticket prints at the physical location, the reference is opened and processed/ tendered/printed.	Once the ticket prints at the physical location, the reference is opened and processed/ tendered/printed.
12	<p>The system checks the user's Store Group/Default Location if the user attempts to access any screen other than POS. If the current store is validated, User Security determines the screens that can be accessed.</p> <p>The system prompts, 'You are only allowed to access the POS screen on this phone room terminal' when the current store is not validated as part of the user's Store Group/Default Location.</p>	<p>The system checks the user's Store Group/Default Location if the user attempts to access any screen other than POS. If the current store is validated, User Security determines the screens that can be accessed.</p> <p>The system prompts, 'You are only allowed to access the POS screen on this phone room terminal' when the current store is not validated as part of the user's Store Group/Default Location.</p>

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## 3. EMPLOYEE PHONE ROOM

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### 3.1. Overview

Employee Phone Room is an application-supported process that allows an employee to receive incoming calls and create sales for a set of stores related to a specific store group.

Employee Phone Room, or Call Center, functionality enables an employee to take customer part orders for supported stores within a given database or store group. Phone Room Reps handle the incoming calls and create the invoices in the stores that will be selling the product.

All accounts have an optional Phone Room store field set up in the INTERNET SETUP window, accessed from the INTERNET SETUP button in the MAIN ACCOUNT ENTRY screen, accessed from Customer, Accounts, Account Main, that indicates the:

- Default store
- Location where inventory is deducted from
- Store where Phone Room documents print

The field value is used as the default location only. The SELECT PHONE ROOM LOCATION window opens each time the PHONE ROOM button is clicked at POS. The location can be changed on demand at POS until an item is added to the body of the invoice.

Even though the account has a default phone room store, the Phone Room Rep is still prompted each time to select a store to determine store inventory and document print for that sales event. However, the account's phone room store is highlighted when selecting locations at POS so pressing the Enter key selects that store.

The associated document from the item sales prints in the selected store. The pay/tender function also occurs in the actual associated store.

The TERMINAL SETUP, STORE INFORMATION, NEW ACCOUNT DEFAULTS, ACCOUNT MASS UPDATE UTILITY, MAIN ACCOUNT ENTRY screens and INTERNET SETUP window support the Phone Room functionality.

### 3.2. Employee Phone Room Configuration and Setup

An enterprise application switch must be set up to use Employee Phone Room functionality. Contact Customer Support for assistance.

Configuration and setup of the following screens/window support the Phone Room functionality:

- TERMINAL SETUP
- STORE INFORMATION
- MAIN ACCOUNT ENTRY
- EMPLOYEE SETUP

Enterprise Control: Phone Room Setting	Controls, Store, Store Information: PHONE ROOM LOCATION Flag	PC Setup, Terminal Setup: PHONE ROOM TERMINAL Flag	Controls, System, Employee Setup: PHONE ROOM REP Flag	Outcome
Disabled	N/A	N/A	N/A	No Phone Room functionality.
Employee Phone Room (PW1)	Unchecked	Unchecked	N/A	No Phone Room functionality.
	Unchecked	Checked	Unchecked	No Phone Room functionality.
	Unchecked	Checked	Checked	Phone Room functionality is available for the employee when using the terminal.
	Checked	N/A	Unchecked	No Phone Room functionality.
	Checked	N/A	Checked	Phone Room functionality is available for the employee on all terminals in the store.

### 3.3. Phone Room Rep

Any employee can be set up for Phone Room functionality by checking the PHONE ROOM REP field in the EMPLOYEE SETUP screen.

When the PHONE ROOM REP field is checked, the PHONE ROOM button and all POS Phone Room functionality as well as regular Invoicing functionality, depending on security permissions, is available to the user at Point of Sale. When the field is unchecked, the PHONE ROOM button is hidden for the user at POS.

**Note:** When the Phone Room enterprise control is set to not use Phone Room functionality or set to use Terminal Phone Room functionality, the PHONE ROOM REP field is disabled and hidden.

Managers and Asst Managers are not automatically able to access the PHONE ROOM button at POS and must also have the PHONE ROOM REP field checked in order to access the button.

When the enterprise control is set to use Employee Phone Room and the employee is a Phone Room Rep:

- Regardless whether the PHONE ROOM TERMINAL field is checked or unchecked, the system looks first at the PHONE ROOM LOCATION field in the STORE INFORMATION screen and, if the field is checked, then Phone Room functionality is available for the employee on all terminals in the store.
- When the PHONE ROOM LOCATION field in the STORE INFORMATION screen is unchecked, the employee is able to use Phone Room functionality only from terminals where the PHONE ROOM TERMINAL field is checked.

The employee's assigned security designates any, and all, function control unless overridden by the Phone Room's operations controls.

Based on the individual's security plan, an employee can be a Phone Room Rep as well as a Counterperson. The Phone Room Rep has all the invoice functional capabilities as a Counterperson in the account's Phone Room store.

The Phone Room Rep can:

- Sell items directly
- Source or special order items
- Record lost sales

The Phone Room Rep can process item sales using:

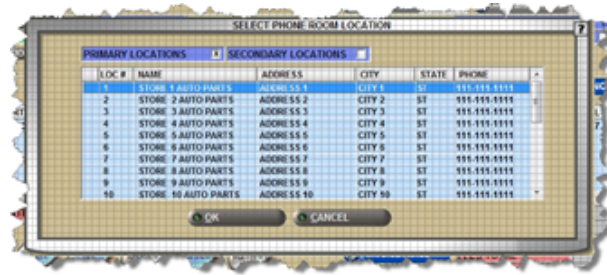
- Pick Ticket
- Pack Slip
- WIP
- On Account (Commercial Charge)

### **3.4. Point of Sale (POS) Functionality**

The Phone Room Rep follows normal POS functions when selling and editing line items. During a standard sale, the Phone Room Rep sells/scans items onto a ticket. Debits and credits can both be added to the same invoice. The POS return process remains unchanged. Upon completion of the order for both selling/editing line items and doing a return, the Phone Room Rep may make the ticket a WIP, Pick Ticket, Pack Slip or commercial invoice. However, tender options, including Dating, are not available in Phone Room functionality.

The sales order is owned by the Phone Room Rep that processed the ticket. Items added to the document are set to the Phone Room Rep or store Counterperson who added the item. The employee who prints the document is set as the 'cashier' of the document. Line items are processed within the program as an Internet Order.

The PHONE ROOM button enables an employee who has the PHONE ROOM REP flag checked in the EMPLOYEE SETUP screen, accessed from Controls, System, Employee Setup, to access phone room functionality. Click the PHONE ROOM button to display the SELECT PHONE ROOM LOCATION window. Only locations within the user's DEFAULT LOCATION / STORE GROUP display in the grid. The account's default store, which is set in the PHONE ROOM STORE field in the INTERNET SETUP window, accessed from the MAIN ACCOUNT ENTRY screen, displays highlighted in the grid. When the PHONE ROOM STORE field is set to ALL, the grid displays with no store highlighted.



Once a store has been selected and a part is added to the invoice body, the button name changes from PHONE ROOM to PRINT PHONE ROOM. Click the PRINT PHONE ROOM button to display the PHONE ROOM window.



The Phone Room Rep can select to print a PICK, PACK, WIP, INVOICE or SLIP. When the Phone Room Rep is finished adding the items to the ticket and clicks the PRINT PHONE ROOM button, the document is queued to print in that store using the background processor. When the ticket is printed, the parts are **manually** gathered and the invoice is **manually** tendered. Since the Phone Room ticket is created in the selected store, the invoice is tracked to the Phone Room Rep who starts the ticket in that store the same way a regular non-Phone Room invoice is tracked to the user who starts the ticket in the store it is created in.

The Phone Room Rep can optionally print on account or tender cash tickets and can also:

- Create a regular ticket without selecting a location to send the ticket to.
- Create a Phone Room ticket and select a location to send the ticket to.
- Tender regular tickets as long as User Security permission allow.

Tender Phone Room tickets as long as User Security permission allow. The user must be in the selected location, either physically or virtually, in order to tender a Phone Room ticket.

The following steps provide a high-level overview of the **Employee Phone Room** functionality as it applies to POS:

1. Log in.  
*The program validates the user as either in a Phone Room Rep.*
  2. Access Point of Sale (Invoice) via the Menu or the F7 key.  
*The user is prompted for his POS ID, if the Phone Room feature is enabled. Standard POS functionality continues, except as noted.*
  3. Enter the customer's account number or account code in the ACCT NUMBER or ACCT CODE field.  
*The program reads the account's Phone Store value. When set, the account is loaded and the user is in the store set in the parameter. When not set, the SELECT STORE window displays.*
  4. Continue POS processing, based on the user's security.  
*If the user is a Manager, then Manager override prompts and capabilities are available, as usual. If the user is a Phone Room Attendant, Counterperson capabilities apply and the user is assigned ownership of the ticket.*
  5. Click PHONE ROOM when items are added to the invoice to queue the ticket for printing by the background process at the physical location.  
*The SELECT PHONE ROOM LOCATION window displays with the default store highlighted.*
- Note:** If PHONE ROOM is clicked **before** any items are added to the invoice, the store number can be selected for the transaction so inventory is allocated from the appropriate location.
6. Click OK to select location.  
*Once selected, the ticket is redirected/rerouted to the store where the ticket is created and the parts deducted from its inventory. The system changes to the selected store, reloads the INVOICE screen with the customer. Items can now be entered on the ticket. Once the part is added to the invoice body, the button name changes from PHONE ROOM to PRINT PHONE ROOM.*
  7. Add all applicable items to the ticket.
  8. Click PRINT PHONE ROOM.  
*The PHONE ROOM window displays to select the type of document to print.*
  9. Click the appropriate document type.  
*The document is queued to print in that store using the background processor. When the ticket is printed, the parts are **manually** gathered and the invoice is **manually** tendered.*

## **3.5. Sourcing**

### **3.5.1. Source Orders**

The Phone Room Rep can perform all Source It and special order functions.

1. All Customer Sourcing and special order functionality is available.
2. The Pick prints "PHONE ROOM ORDER" at the top of the form and, if sourced by the Phone Room Rep, "- PHONE ROOM ORDER - ATTN! BUY OUTS" prints in place of the standard invoice message.
3. The document may be printed or voided and follows all existing NIF and POS invoice and sourced order processing rules.

### **3.5.2. Auto Source Orders**

Should the ticket be auto sourced, once the invoice is printed and the PO has been modified as AUTO SOURCED, all existing AUTO SOURCE functionality is available.

### **3.5.3. Change Store**

When a caller requests to pick up or receive inventory from another store, the store is changed by PHONE ROOM REP by using the PHONE ROOM field. With the account in focus, but prior to adding the first part to the invoice body of the order, the account can be redirected/rerouted to the store where the parts will be deducted from inventory and print. Once a part is added to the invoice body, the PHONE ROOM button is disabled.

### **3.5.4. Change Customer**

Once items are added to a phone room ticket, the POS CHANGE CUSTOMER function only allows the change of the customer within the designated location but will not change the selling store.

Should the customer's STORE field be different than the store the phone room ticket is sent to, or should the customer's STORE GROUP not include the store the phone room ticket is sent to, the system prompts 'The account is not allowed to buy parts from this store!'

### **3.5.5. Change Printer**

The document type selected in the PRINT PHONE ROOM window dictates the printer that the BG processor uses.

### 3.6. Procedure to Configure Employee Phone Room Location

To configure an Employee Phone Room location, follow the steps below:

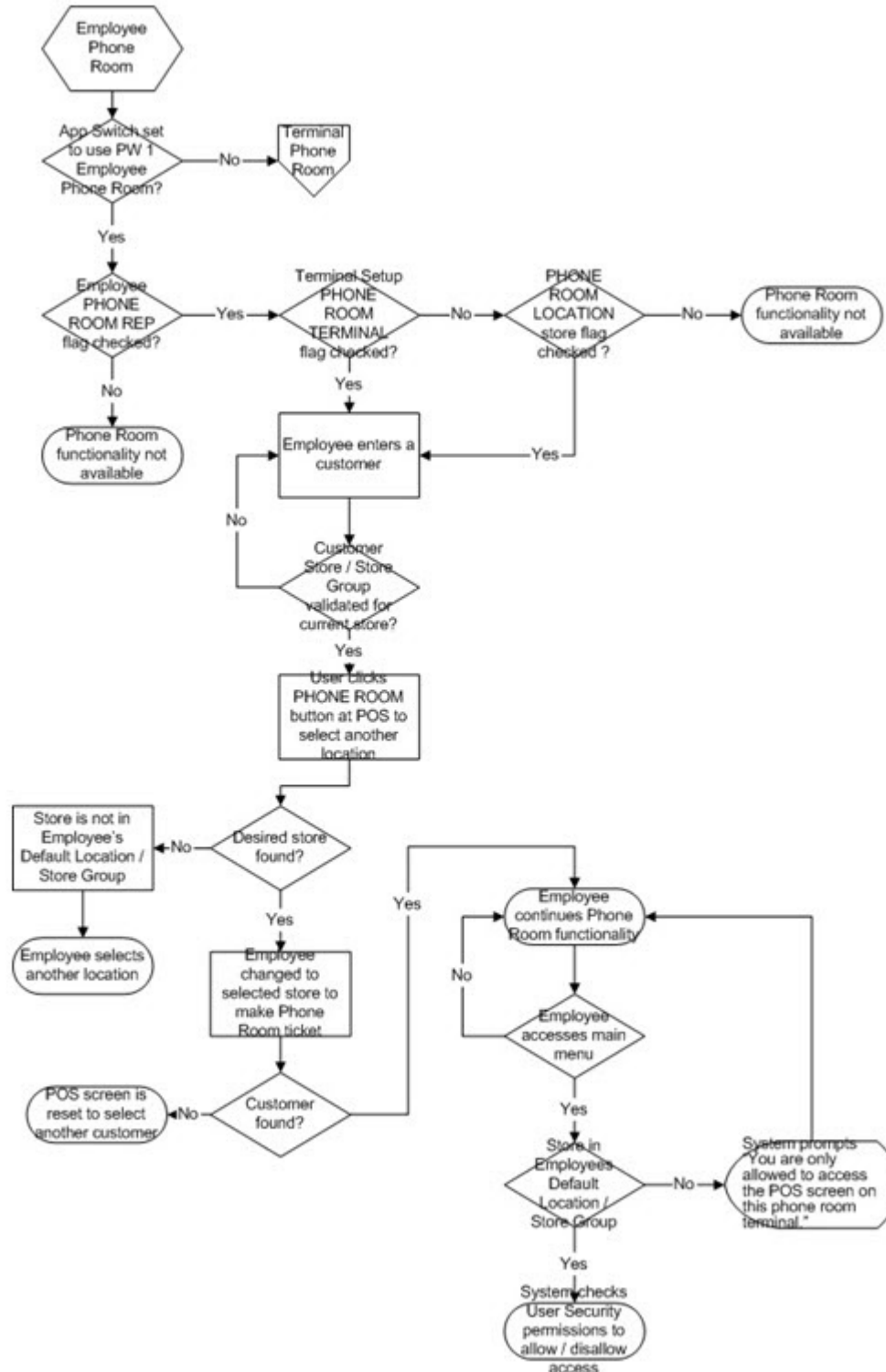
**Note:** The Enterprise Control must be set to PW1 (Employee Phone Room).

1. From the Menu, select Controls, System, Employee Setup.  
*The EMPLOYEE SETUP screen displays.*
2. Click EDIT.  
*The Edit mode is enabled.*
3. Click the PHONE ROOM REF checkbox.
4. Click UPD and CLOSE.  
*The value is saved and the employee is now a Phone Room Rep. The screen closes.*
5. Click the PHONE ROOM TERMINAL field in the TERMINAL SETUP screen, accessed from PC Setup, Terminal Setup, per terminal or the PHONE ROOM LOCATION field in the STORE INFORMATION screen, accessed from Controls, Store, Store Info, for all terminals.
6. Log out of the application and log back in.  
*This employee is now a Phone Room Rep.*

### 3.7. Mode 2 Operations

All Phone Room functionality is available in Mode 2.

### 3.8. Employee Phone Room Flow Chart



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## 4. TERMINAL PHONE ROOM

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### 4.1. Overview

Phone Room is an application-supported process that allows a phone center to receive incoming calls and create sales for a set of stores related to a specific store group.

Phone Room, or Call Center, is the central location that processes customer part orders using all the stores within a given database or store group. Phone Room Reps handle the in-coming calls for a store or store group.

All accounts have an optional Phone Room store field set up in the INTERNET SETUP window, accessed from the INTERNET SETUP button in the MAIN ACCOUNT ENTRY screen, accessed from Customer, Accounts, Account Main, that indicates the:

- Default store
- Location where inventory is deducted from
- Store where Phone Room documents print

If the Phone Room store is not set, then the Phone Room Rep is prompted each time to select a store to determine store inventory and document print for that sales event.

The Phone Room Rep can:

- Sell items directly
- Source or special order items
- Record lost sales

The Phone Room Rep can process item sales using:

- Pick Ticket
- Pack Slip
- WIP
- On Account (Commercial Charge)

The associated document from the item sales prints in the store associated with the account. The pay/tender function also occurs in the actual associated store.

The TERMINAL SETUP, STORE INFORMATION, NEW ACCOUNT DEFAULTS, ACCOUNT MASS UPDATE UTILITY, MAIN ACCOUNT ENTRY screens and INTERNET SETUP window support the Phone Room functionality.

When a Phone Room, or store acting as a Phone Room, is in Mode 2, the Phone Room can only create an order for the store whose part file is in its offline database. The ticket can only be held in the Phone Room store's terminal until Mode 1 resumes. Without a connection, the Phone Room store cannot send an order; therefore, it does not matter if the store that the ticket belongs to is also in Mode 2 or is operational and in Mode 1.

## 4.2. Terminal Phone Room Configuration and Setup

The PHONE ROOM TERMINAL flag in the TERMINAL SETUP screen is used in conjunction with the PHONE ROOM LOCATION flag in the STORE INFORMATION screen to determine Phone Room functionality.

Configuration and setup of the following screens/window support the Terminal Phone Room functionality:

- TERMINAL SETUP
- STORE INFORMATION
- INTERNET SETUP
- NEW ACCOUNT DEFAULTS
- ACCOUNT MASS UPDATE UTILITY

Enterprise Control: Phone Room Setting	Controls, Store, Store Information: PHONE ROOM LOCATION Flag	PC Setup, Terminal Setup: PHONE ROOM TERMINAL Flag	Controls, System, Employee Setup: PHONE ROOM REP Flag	Outcome
Disabled	N/A	N/A	N/A	No Phone Room functionality.
Terminal Phone Room (PW2)	Unchecked	Unchecked	N/A	No Phone Room functionality.
	Unchecked	Checked	N/A	Phone Room functionality is available for all employees when using the terminal.
	Checked	N/A	N/A	Phone Room functionality is available for all employees on all terminals in the store.

## 4.3. Phone Room Rep

The role of the Phone Room Rep is not an assigned role. Phone Room Rep capability is controlled by location or by terminal. Refer to the PC Store Setup and Store Information Help topics for additional information.

Tender functions are disabled for Phone Room functionality; therefore, a Phone Room Rep cannot be a cashier. The employee's assigned security designates any, and all, function control unless overridden by the Phone Room's operations controls.

## 4.4. Point of Sale (POS) Functionality

The Phone Room Rep follows normal POS functions when selling and editing line items. During a standard sale, the Phone Room Rep sells/scans items onto a ticket. Debits and credits can both be added to the same invoice. The POS return process remains unchanged. Upon completion of the order for both selling/editing line items and doing a return, the Phone Room Rep may make the ticket a WIP, Pick Ticket, Pack Slip or commercial invoice. However, tender options, including Dating, are not available in Phone Room functionality.

The sales order is owned by the Phone Room Rep that processed the ticket. Items added to the document are set to the Phone Room Rep or store Counterperson who added the item. The employee who prints the document is set as the 'cashier' of the document. Line items are processed within the program as an Internet Order.

The following steps provide a high-level overview of the **Terminal Phone Room** functionality as it applies to POS:

1. Log in.  
*The program validates the user as either in a Phone Room location or at a Phone Room terminal.*
2. Access Point of Sale (Invoice) via the Menu or the F7 key.  
*The user is prompted for his POS ID, if the Phone Room feature is enabled. Standard POS functionality continues, except as noted.*
3. Enter the customer's account number or account code in the ACCT NUMBER or ACCT CODE field.  
*The program reads the account's Phone Store value. When set, the account is loaded and the user is in the store set in the parameter. When not set, the SELECT STORE window displays.*
4. Continue POS processing, based on the user's security.  
*If the user is a Manager, then Manager override prompts and capabilities are available, as usual. If the user is a Phone Room Rep, Counterperson capabilities apply and the user is assigned ownership of the ticket.*

## 4.5. Sourcing

### 4.5.1. Source Orders

The Phone Room Rep can perform all Source It and special order functions.

Upon completing the sourcing process, the Phone Room Rep clicks the FINISH button, which creates a SOURCE PO and prints a Pick Ticket in the account's Phone Room assigned store.

**Note:** All accounts have an assigned Phone Room or store that directs the store that is the default, where inventory is deducted from and the store in which the Phone Room documents print.

When printed, the upper portion of the Pick Ticket indicates PHONE ROOM ORDER. When items are sourced by the Phone Room, the upper portion of the Pick Ticket indicates PHONE ROOM ORDER - ATTN! BUY OUTS. These messages only print on the Pick Ticket, not the invoice.

Sourced orders are then completed by store personnel.

### 4.5.2. Auto Source Orders

Source It orders are processed the same as Source Orders. Store personnel recall the order and are able to print the sales order as an invoice.

### 4.5.3. Change Store

When a caller belongs to or is owned by a particular store, as set by the PHONE ROOM STORE field, but requests to pick up or receive inventory from another store, the store can be changed by using the CHANGE STORE field. With the account in focus, but prior to adding the first part to the invoice body of the order, the account can be redirected/rerouted to the store where the parts will be deducted from inventory and print. Once a part is added to the invoice body, the CHANGE STORE button is disabled.

The SELECT STORE window enables the user to change the store.

### 4.5.4. Change Customer

The Change Customer process has limited functionality in Phone Room mode. Once items are added to the document (WIP, Pick Ticket, Pack Slip or On Account Commercial Charge), the Change Customer function only allows the user to change the customer, not the selling store.

When a selected customer from the Change Customer process has a different Phone Room store than the account/store of the sales order in focus, a warning displays stating, 'Account has a phone store of #. Change Account Only? Y/N.' 'Yes' changes the account based on the standard change account rules. 'No' returns to POS with the current account still in focus.

### 4.5.5. Change Printer

The document prints to the assigned store, per Phone Room setup.

Due to network limitations, the Change Printer function is not supported for Phone Room Reps. The user may use the CHANGE STORE button to redirect the printing.

## 4.6. Procedure to Configure Terminal Phone Room Location

To configure a Terminal Phone Room location, follow the steps below:

**Note:** The Data Center must first create a new store key **or** identify an existing store as a Phone Room Store and the Enterprise Control must be set to PW2 (Terminal Phone Room).

1. From the Menu, select Controls, Store, Store Info.  
*The STORE INFORMATION screen displays.*
2. Click EDIT.  
*The Edit mode is enabled.*
3. Click the PHONE ROOM LOCATION checkbox.
4. Click UPD and CLOSE.  
*The value is saved and the whole store/location is now a Phone Room Center. The screen closes. All terminals, existing or new, that set or enter into this store are not able to tender cash and function supporting all Phone Room processes.*
5. If currently in an existing screen, then log out and log back in.  
*This terminal is now a Phone Room location.*

**Important:** Be sure that the selected store in the TERMINAL SETUP screen is also registered to a Phone Room location. A virtual security user is allowed to navigate from store to store. The user can be in Phone Room mode only in that store but not in Phone Room store all the time. While the Phone Room terminal setting in the TERMINAL SETUP screen is not evaluated in this configuration, setting the value ensures Phone Room operations for both virtual and non-virtual security users.

## 4.7. Procedure to Configure Terminal Phone Room Terminal in Non-Phone Room Location

To configure a Phone Room terminal in a non-Phone Room location, follow the steps below:

1. Connect to a new PC or use an existing PC.
2. From the Menu, select PC Setup, Terminal Setup.  
*The TERMINAL SETUP screen displays.*
3. Click EDIT.  
*The Edit mode is enabled.*
4. Click the PHONE ROOM TERMINAL field.
5. Click UPD and CLOSE.  
*The information is saved and the screen closes. The PC is set to Phone Room.*
6. If currently in an existing screen, then log out and log back in.  
*This terminal is now a Phone Room terminal.*

**Note: Do not** set the PHONE ROOM LOCATION field in the STORE INFORMATION screen. Only this terminal functions as a Phone Room terminal supporting all the Phone Room processes. All other terminals have full store functions and are considered 'regular' store terminals.

**Important:** A virtual security user is allowed to navigate from store to store and is in Phone Room mode in all stores under his configuration.

## 4.8. Mode 2 Operations

Mode 2 is a process that enables a store to continue limited operation of customer sales offline when the database resources are interrupted. When a connection to the database cannot be established, the store or PC(s) goes into Mode 2, which is considered 'offline'. Mode 2 enables the user to create, validate and finalize sales orders so that Point of Sale invoicing can continue even when connectivity to the data center is lost. When the connection is restored, the store or PC(s) is then considered 'online'.

If a store/location loses connectivity, then all terminals in that store go into Mode 2. If, within that location, some terminals are regular store terminals and some terminals are Phone Room terminals, then each terminal continues to function as per the rules of that terminal.

Only Phone Room terminals are able to process Phone Room requests to the store and set to the inventory file, which was downloaded into that terminal's offline database. If the location is a Phone Room location, then all terminals can only process Phone Room orders to the inventory file that is downloaded to that terminal's offline database and for customers assigned to that store. In both instances, if the user calls an account with a Phone Room store that does not have offline store's inventory downloaded, then the new invoice fails with a Mode 2 error message. Since Phone Room locations do not display in the BROWSE LOCATIONS window, if the location is not a Phone Room location, the user may click the SELECT STORE button and choose to fill the order from the location loaded into the offline inventory.

All processing continues following normal Mode 2 rules. Tickets created in Mode 2 are not sent to the intended store until Mode 1 operations resume. Once the store is back online, all the terminals process and release the orders.

If the Phone Room store or terminal is working but the store filling the order is offline, then the order sits in the queue until that store comes back online.

The Phone Room store is either in Mode 1 or Mode 2.

1. When the Phone Room store is in Mode 1, the store can communicate with any store that the Phone Room store is servicing that is in Mode 1 but not with stores that it services that are in Mode 2. Those stores are unable to receive the communication from the Phone Room. Tickets sit in the Mode 2 store's background job until its connectivity is back online and Mode 1 resumes. The store can then process the documents.
2. When the Phone Room store is in Mode 2, all tickets are held in the Phone Room store's background job until the Phone Room store comes back online and Mode 1 resumes. A Phone Room store or terminal in Mode 2 can only create an order for the store whose part file is in its offline database. Regardless of whether or not some of the stores that the Phone Room services are still in Mode 1, the Phone Room store is offline and cannot communicate with any of the receiving stores. The Phone Room store cannot send the order.

### 4.9. Terminal Phone Room Flow Chart

