



BIG HAIRY DOG Feature of the Month

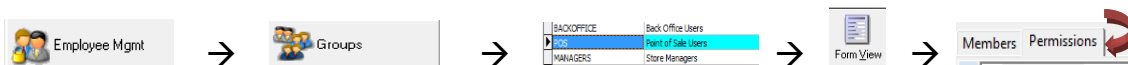
Tracking Lost Sales v.9

<https://www.youtube.com/watch?v=kBxarTAMlUo>

What is a Lost Sale? A lost sale is a potential sale that was lost. This most commonly occurs when a customer is looking for a particular size, but you are out of that size. This information can be helpful for the buyer to become more aware of your market and adjust their quantities accordingly.

There are a couple of things you will need to set up, if you decide to track lost sales.

- Make sure that “Receipt Type” is a field on your receipt screen as well.
- Go To EMPLOYEE MGMT>GROUPS>POS GROUP>FORM>PERMISSIONS



- Click the plus next to Retail Pro 9 (red arrow) and highlight RECEIPTS (blue arrow). Find the setting that says “CREATE RECEIPT TYPE: LOST”(green arrow). Put a check mark in the permission column (orange arrow)

Permission Name	Permission	Override	Log Event
ACCESS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ACCESS CHANGE TILL	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ADD ITEMS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ALLOW TENDER WITHOUT ITEM OR FEE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CHANGE ASSOCIATES ON FORMER RECEIPT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CHANGE ASSOCIATES ON NEW/HELD RECEIPT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CHANGE CASHIER	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CHANGE DATE ON NEW RECEIPT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CHANGE DAY OF DATES ON FORMER RECEIPTS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CHANGE DEFAULT SUB LOCATION	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CHANGE RECEIPT PRICE LEVEL	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CHANGE RECEIPT TAX AREA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CHANGE RECEIPT TAX PERCENT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CHANGE STORE NUMBER	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CHANGE TENDER ON RETURN RECEIPT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CHOOSE ITEMS TO LIST ITEMS ON RECEIPT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
COPY RECEIPT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CREATE RECEIPT TYPE - CASH DROP	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CREATE RECEIPT TYPE - LOST	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CREATE RECEIPT TYPE - RETURN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CREATE RECEIPT TYPE - SALE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DIRECT EDITING OF TOTAL	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DISCARD RECEIPT IN PROGRESS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

To ring up a Lost Sale, go into a new receipt like normal.



Everything is the same with a lost sale as in a regular sale with a couple of exceptions.

- Change the “Receipt Type” to Lost Sale
- When you go to the tender screen, there will be NO Amount Due and you can immediately update the receipt.

0.00
Amount Due

Update Only

- Update as normal.

REPORTING ON LOST SALES

Now that you are tracking Lost Sales, you will need a report to analyze this new information. There is not a default report for this, so use any receipt journal and FILTER for Lost sales.

1. Go to V9 REPORTS>REPORTS>JOURNALS



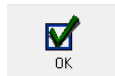
2. Highlight whichever Receipt Journal you prefer to use, and click RUN. **HINT**: it is best to choose a receipt journal that includes item detail.



3. A filter window will pop up to allow you to filter for Receipt Type. **HINT**: most of the time this field will be towards the bottom of the filter



4. Fill in the rest of your filter (optional), and then click OK.



5. You should now have your lost sales receipt journal.