POS User Guide for Cashiers

Contact Information

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Contents

About POS, Store Manager, and Central Manager

POS is RMH's point-of-sale app. POS is easy to use, but at the same time it provides powerful transaction processing and customer management functionality. POS is integrated with the **Store Manager** back office app, which you use to configure your store operations, establish policies and rules, manage inventory, and more.

POS and Store Manager can be integrated with the **Central Manager** multi-store management app, which you can use to manage inventory, item pricing, discounts, sales, and purchasing for groups of stores from a central headquarters location.

POS, Store Manager, and Central Manager can be integrated with RMH's **Loyalty Manager** customer loyalty and rewards app, which you can use to set up and manage customer loyalty programs with customizable point collection and redemption schedules.

Exploring the POS window

Title bar

In the title bar (A), at the top of the window, you can change the size of the POS window by selecting one of the pre-defined window sizes. (You can also click and drag the edge of the window until the window is the desired size.) You will probably want the POS window to fill the screen so it's easy to see customer information and transaction details.
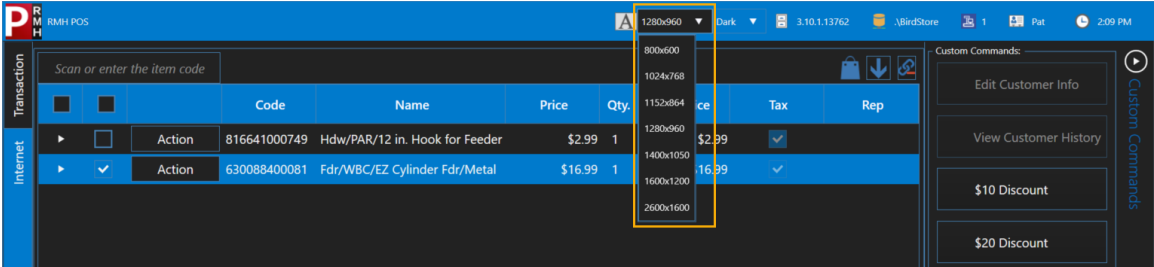
You can also use either a high-contrast dark skin or a low-contrast light skin for the window. Choose a skin that makes it easy for you to read the transaction details on the screen.
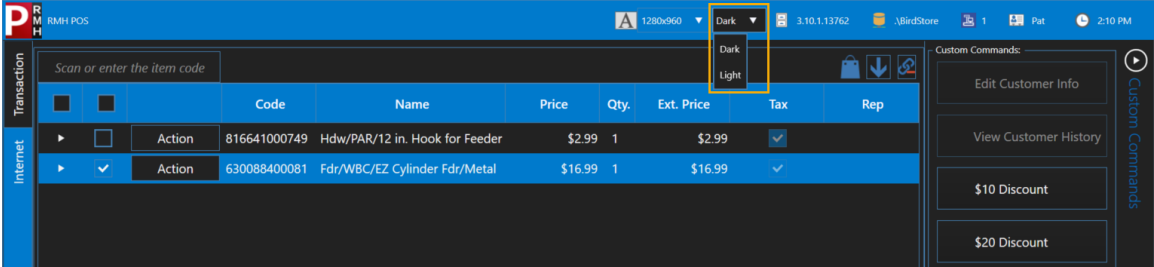
The title bar also shows information about POS, such as the store's weights and measures (WAM) certification number (not shown in screen shot), the POS software version, the name of the database that POS is connected to, the register number, the user name of the cashier who is logged in, and the current time.

Transaction tab and optional Internet tab

You will notice that there are two tabs (B) to the left of the window. You will spend most of your time on the **Transaction** tab.

Your store has the option to integrate a web site into POS on the **Internet** tab, such as a search site like Google, the store's e-commerce site, a supplier's site, or a shipping company's site.

> **Warning!** Once the Internet tab is enabled, store employees can use it to navigate to various internet sites. This can expose the store to risk.
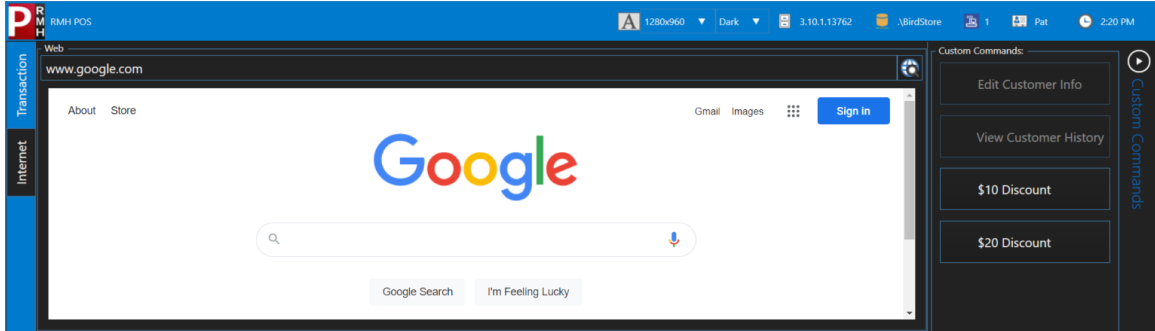
Lookup field

A common feature of the POS window is the lookup field (C). There are different kinds of lookup fields. The item lookup field is used to look up items. There is also a customer lookup field, a sales representative lookup field, a transaction lookup field, and so on.

Transaction list

The most important part of the POS window is the transaction list (D). This is where you can see all of the items in a transaction, and details such as the item lookup code, name, price, item quantity, and so on.

Transaction summaries

Another important part of the POS window is the transaction summary (E, F), below the transaction list. This is where you can easily see the number of items in the transaction, any savings the customer is getting because of sales or discounts, as well as the item subtotal, taxes, and transaction total.

POS mode and transaction list controls

Above the transaction list are three icons (G):

The first icon indicates the POS mode, such as sale, return, quote, work order, layaway, and so on. The default POS mode is sale. The icon that displays indicates the active POS mode.

The second icon indicates whether new items will be added to the top or bottom of the transaction list. If the arrow is pointing up, new items will be added to the top of the transaction list. If the arrow is pointing down, new items will be added to the bottom of the transaction list. Click the icon to change the order.

The third icon indicates whether roll up is on or off. If roll up is on and you scan the same item at different times during the transaction, the items are consolidated on one line in the transaction list. If roll up is off, each item displays on a separate line in the transaction list.

Function buttons

Below the transaction summary is a row of function buttons (H). You can use these buttons to perform specific tasks in POS, such as looking up items or customers, tendering the sale, applying discounts, and so on.

Optional keyboard

Below the row of function buttons is an optional on-screen keyboard (I). You would use the on-screen keyboard if, for example, your store uses touchscreen monitors in POS lanes instead of regular computer keyboards. You can show and hide the keyboard by clicking the **Keyboard** drop-down button.

Optional custom commands

To the right of the window you may see a list of buttons in the Custom Commands pane (J). Your store has the option to define its own custom buttons to provide shortcuts for common tasks such as looking up customers or sales representatives, applying dollar or percent off discounts, or tendering common cash denominations such as 20s, 50s, or 100s.

Working with POS

Opening and closing

Entering opening cash amounts

Enter the opening cash amount in the cash drawer for each POS lane at the beginning of the day or at the beginning of your shift.

> **Pre-requisites:** You must have the **Allowed to enter Opening Amounts** permission to enter opening cash amounts in POS.

1. Count all cash in the cash drawer:

    a. Write down how much cash you have in the various denominations.

    b. Calculate the total amount of cash in the cash drawer.

2. If necessary, restock the cash drawer with coins or smaller bills, e.g., $5, $10.

3. In POS, tap **Operations | Batch | Enter Opening Amounts**.

> **Note:** If opening cash amounts have already been entered, you will be prompted to keep or overwrite the existing opening cash amounts. To enter new opening cash amounts, tap **Yes**.

4. Tap in the **Cash** field.

5. Do one of the following:

   - Enter the total cash amount; or

   - Tap **Calculator** and enter the total amount for each denomination.
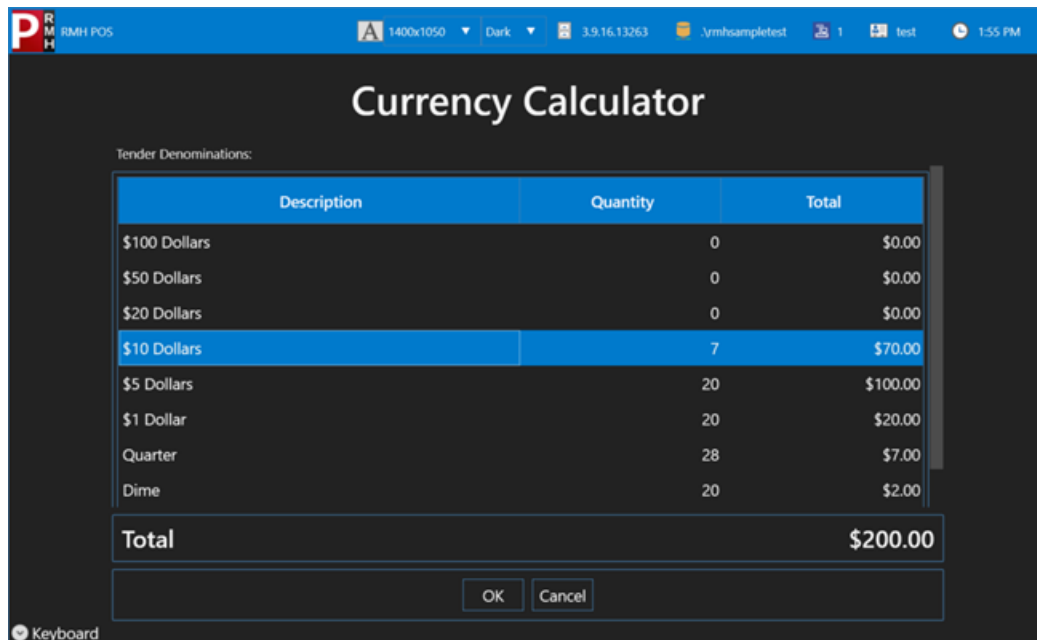
6. Tap **OK**. The POS lane is now ready to open and perform transactions.

Performing blind closeouts

For security reasons, the best practice for counting cash drawers is to remove them from the POS lane and count them out of the sight of customers - preferably in a secure back office. If this is the practice in your store, you will perform a blind closeout at the

end of your shift, remove your cash drawer, log out of POS, and then take your cash drawer to a secure location to count it.

> **Pre-requisites:** You must have the **Allowed to perform Closeouts** permission to perform blind closeouts in POS.

1. Tap **Operations** | **Batch** | **Blind Closeout**.

2. Tap **Yes** to confirm that you want to continue with the blind closeout.

3. Tap **Yes** to print a receipt. The cash drawer will open. Remove your cash drawer.

4. Log out of POS.

5. Follow your store's procedures for counting your cash drawer, entering closing cash amounts, and generating X reports and Z reports.

Entering closing cash amounts

Enter the closing cash amount in the cash drawer for each POS lane at the end of the day or at the end of your shift.

> **Pre-requisites:** You must have the **Allowed to enter Closing Amounts** permission to enter closing cash amounts in POS.

1. Count all cash in the cash drawer:

   a. Write down how much cash you have in the various denominations.

   b. Calculate the total amount of cash in the cash drawer.

2. In POS, tap **Operations** | **Batch** | **Enter Closing Amounts**.

3. Tap in the **Cash** field.

4. Do one of the following:

- Enter the total cash amount; or

- Tap **Calculator** and enter the total amount for each denomination.
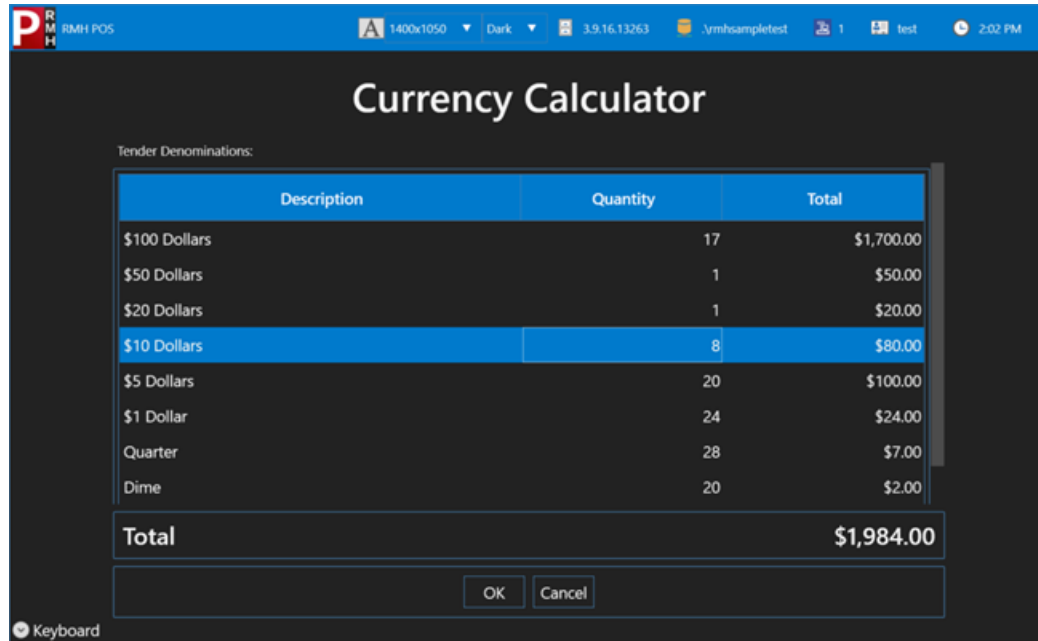
5. Tap **OK**. The POS lane is now ready to close.

Generating X, Z, and ZZ reports

There are three reports available to print from POS:

- **X report:** Displays up-to-the-minute sales for the POS lane. Generating an X report does not close the current batch. It is typically generated throughout the day to check on sales.

- **Z report**: Similar to the X report, the Z report displays up-to-the-minute sales for the POS lane. It is typically generated at the end of a shift or daily at closing time. Generating a Z report closes the current batch and opens a new batch.

- **ZZ report:** Similar to the Z report, the ZZ report displays sales for the POS lane. However, it includes sales from all of the Z reports generated since the last ZZ

report. Printing the ZZ report closes the current batch number and opens the next available batch number.

> **Pre-requisites:** You must have the **Allowed to generate X Reports** and **Allowed to generate Z & ZZ Reports** permissions to generate reports in POS.

Viewing or printing X reports

1. Tap **Operations** | **Batch** and select one of the following:

   - **View X-Report**

   - **Print X-Report**

2. If you are viewing the X report, review the relevant sections of the report and then tap **Close**.
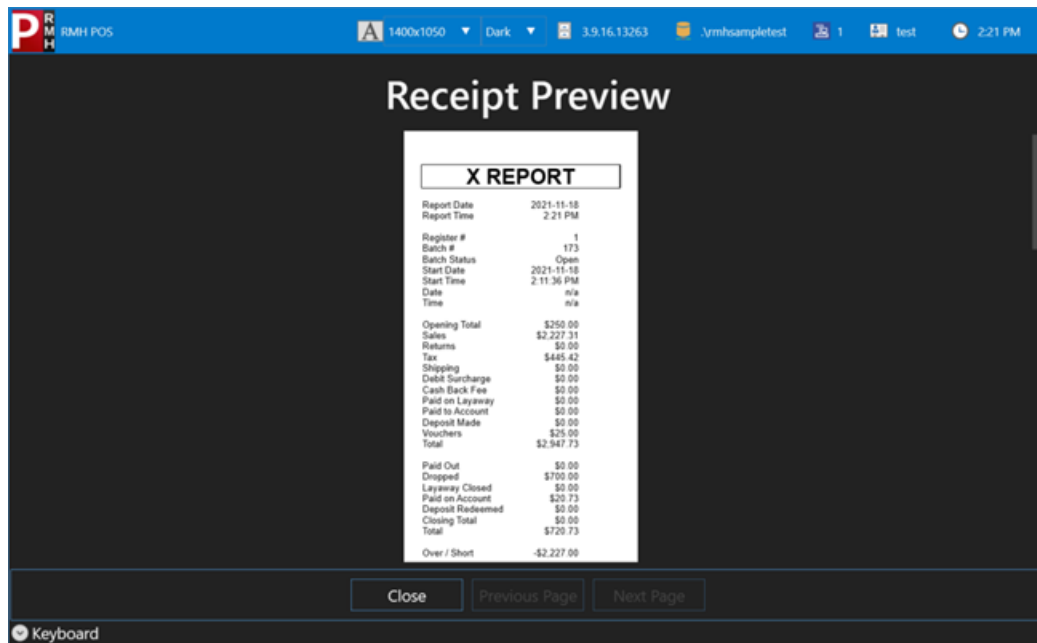
3. If you are printing the X report, tap **Yes** to print the report.

```
┌─────────────────────────────────────┐
│   ┌─────────────────────────┐       │
│   │     X REPORT            │       │
│   └─────────────────────────┘       │
│                                      │
│  Report Date         2021-11-18     │
│  Report Time          2:19 PM       │
│                                      │
│  Register #                   1      │
│  Batch #                    173      │
│  Batch Status              Open      │
│  Start Date          2021-11-18      │
│  Start Time          2:11:36 PM      │
│  Date                       n/a      │
│  Time                       n/a      │
│                                      │
│  Opening Total          $250.00      │
│  Sales                $2,227.31      │
│  Returns                  $0.00      │
│  Tax                    $445.42      │
│  Shipping                 $0.00      │
│  Debit Surcharge          $0.00      │
│  Cash Back Fee            $0.00      │
│  Paid on Layaway          $0.00      │
│  Paid to Account          $0.00      │
│  Deposit Made             $0.00      │
│  Vouchers                $25.00      │
│  Total                $2,947.73      │
│                                      │
│  Paid Out                 $0.00      │
│  Dropped                $700.00      │
│  Layaway Closed           $0.00      │
│  Paid on Account         $20.73      │
│  Deposit Redeemed         $0.00      │
│  Closing Total            $0.00      │
│  Total                  $720.73      │
│                                      │
│  Over / Short         -$2,227.00     │
│                                      │
│  Total Tendered       $2,697.73      │
│  Total Change             $0.00      │
│  Discounts                $0.00      │
│  Cost of Goods        $1,008.70      │
│  Commission               $0.00      │
│  Customer Count               4      │
│  No Sales                     0      │
│  Aborted Trans                1      │
└─────────────────────────────────────┘
```

Printing Z reports

It is best practice to enter opening and closing amounts before printing Z reports. This includes all forms of payment, including debit cards and credit cards. These amounts are available from the X report.

1.   Tap **Operations** | **Batch** | **Print Z-Report**.

2.   Tap **Yes** to print the report.

Printing ZZ reports

If is best practice to enter opening and closing amounts before printing ZZ reports.

1. Tap **Operations** | **Batch** | **Print ZZ-Report**.

2. Tap **Yes** to print the report.

Managing the cash drawer

Performing cash drops

You should skim excess cash from your cash drawer throughout your shift and perform cash drops to the store safe or another secure location. This reduces the store's risk of theft. When you perform a cash drop, the amount is included in your total sales for the day and will display on your Z report.

> **Pre-requisites:** You must have the **Allowed to perform Drops and Pay Outs** permission to perform cash drops in POS.

1. Tap **Operations** | **Cash** | **Cash drop**.

2. Tap in the **Amount** field and enter the total amount that you want to drop, e.g., $1500.
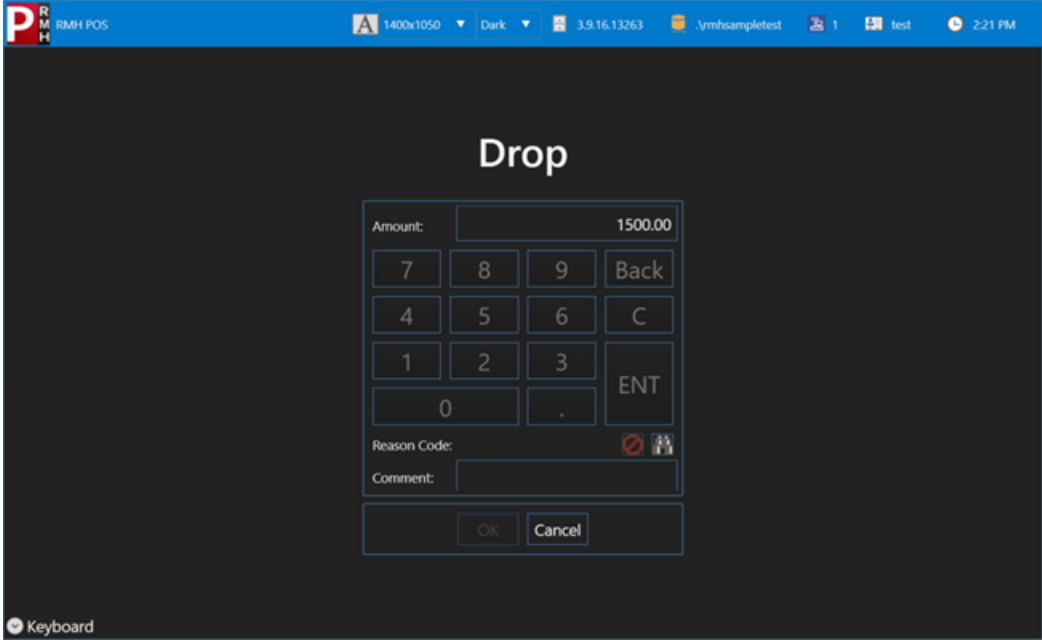
3. (Optional) If your store requires reason codes for cash drops, tap the **Search** icon next to the **Reason Code** field, tap the appropriate reason code to select it, and tap **OK**.
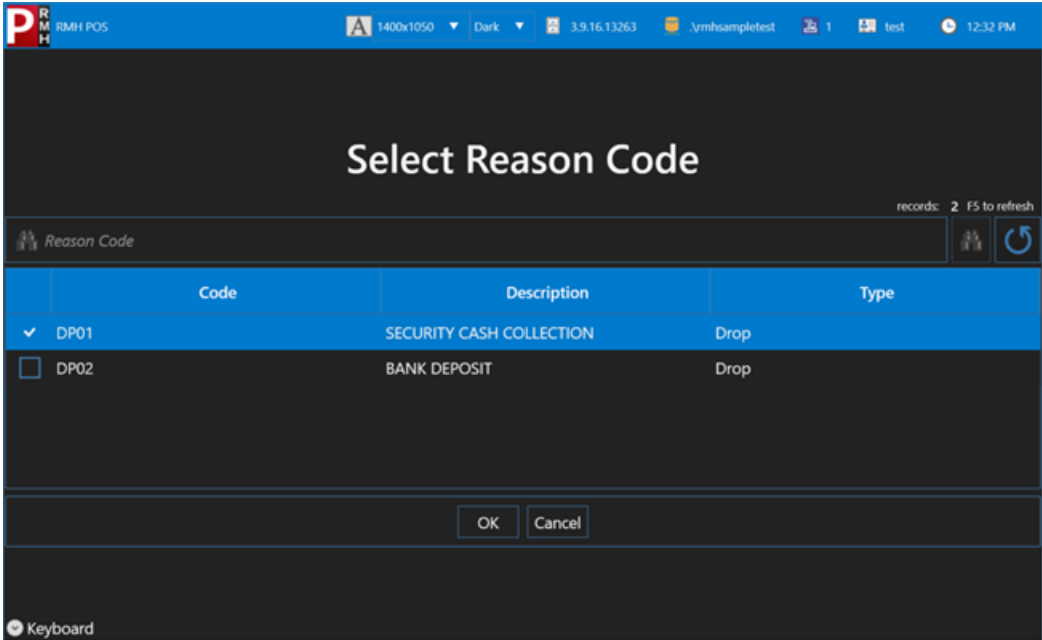
4. (Optional) Tap in the **Comment** field and enter a comment, e.g., Cash drop $1500 to store safe.

5. Tap **OK**.

6. Tap in the **Cash** field and enter the total amount that you want to drop, e.g., $1500.

7. Tap **OK**.

8. Tap **Yes** to print a receipt.

```
          RMH Sample
       7727 Lake Underhill Road
          Orlando FL 32899
          (407) 303-8110
          (407) 303-8110

               Drop

Transaction #:        2019
Date:  2021-11-16     Time:  12:15 PM
Cashier:  test        Register #:   1

Comment:     Cash drop $1500

Tender Type            In          Out
Cash                $0.00    $1,500.00

          ‖‖‖‖‖‖‖‖‖‖‖‖‖‖
               2019
       Thank you for shopping
       RMH Sample -
     We hope you'll come back soon!
```

9.   Follow your store's procedures to drop the cash in the store safe or another secure location.

Performing "no sale" transactions

In retail terminology, a "no sale" transaction refers to opening the cash drawer without actually tendering a sale. There are many reasons for performing a "no sale" transaction. For example, if you are getting low on a particular type of coin in your cash drawer, you might ask a senior cashier or a manager to bring out a roll of coins for you. You would open the cash drawer using a "no sale" transaction and "buy out" the roll of coins using cash from your drawer.

Pre-requisites: You must have the **Allowed to perform No Sales** permission to perform "no sale" transactions in POS.

1.   Tap **Transaction | Sale/Return/No Sale | No Sale**.

2.   (Optional) If your store requires reason codes for "no sale" transaction, tap the applicable reason code to select it and tap **OK**.
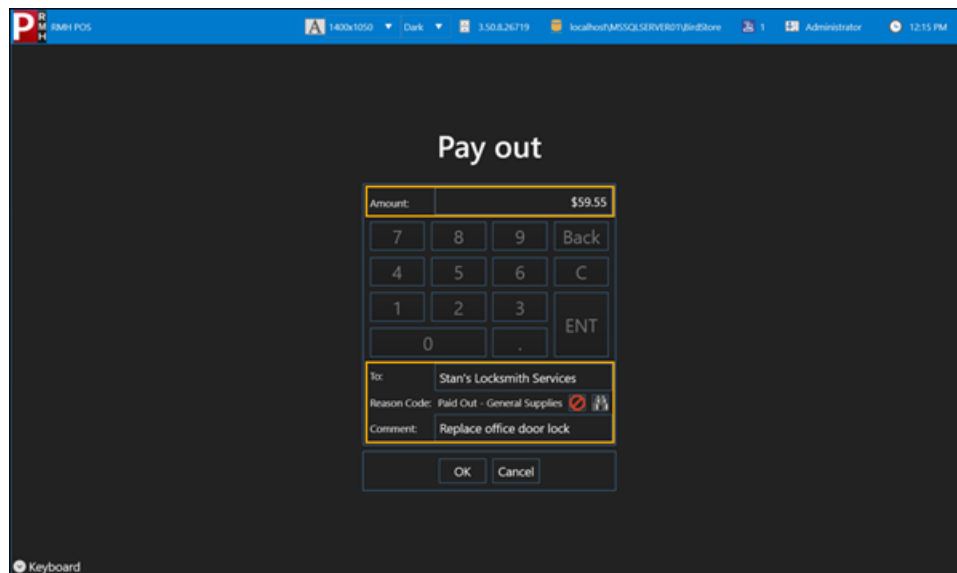
3. (Optional) If your store requires receipts for "no sale" transactions, tap **Yes** to print a receipt.

Performing payouts

In retail terminology, a payout transaction is used to remove money from the cash drawer to pay for minor store expenses (such as a courier delivery fee or a small invoice for locksmith services). Payout transactions are included in X, Z, and ZZ reports.

> **Pre-requisites:** You must have the **Allowed to perform Drops and Pay Outs** permission to perform payouts in POS.

1. Tap **Operations | Cash | Payout**.

2. Tap in the **Amount** field and enter the exact amount of the payout, e.g., $59.55.

3. Tap in the **To** field and enter the name of the person or company being given the payout, e.g., Stan's Locksmith Services.

4. (Optional) If your store requires reason codes for payouts, tap the **Search** icon next to the **Reason Code** field, tap the appropriate reason code to select it, and tap **OK**.

5. (Optional) Tap in the **Comment** field and enter a comment, e.g., Replace office door lock.

6. Tap **OK**.

7. Tap in the **Cash** field and enter the exact amount of the payout, e.g., $59.55.

8. Tap **OK**.

9. Tap **Yes** to print a receipt.

```
            Demo Store - Bird
          12446 Bethesda Ave1
           Bethesda MD 20812
             301-555-1212

                PayOut

Transaction #:        2
Account #:            000000000018
Date:  2023-09-28     Time:  10:15 AM
Cashier:  1           Register #:  1

To:          Stan's Locksmith Services
Comment:     Replace office door lock

Tender Type          In          Out
Cash               $0.00      $59.55

        ||| |||| ||| || |||
                 2
         Thank you for shopping
            Demo Store - Bird
       We hope you'll come back soon!
```

Processing transactions

Adding items to transactions

1. While on the **Transaction** screen, scan the item(s) to add them to the transaction.

2. If an item doesn't scan, try entering the **item lookup code (ILC)** in the **lookup field**.
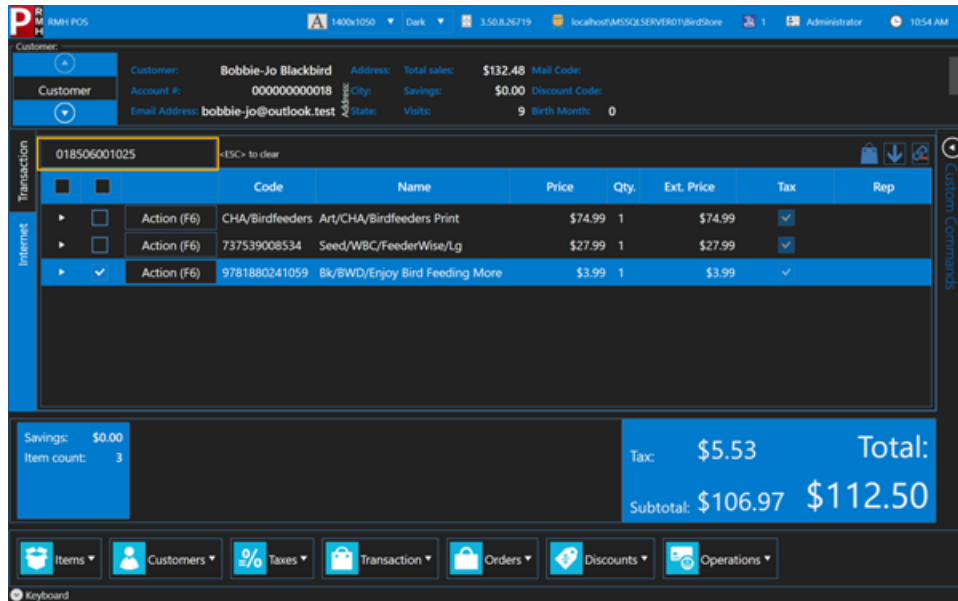
3. If the ILC you entered doesn't work, tap **OK**. On the **Item Lookup** screen, try looking up the item by **item name**, **alias**, **department**, or **category**. Refer to Looking up items for more information.
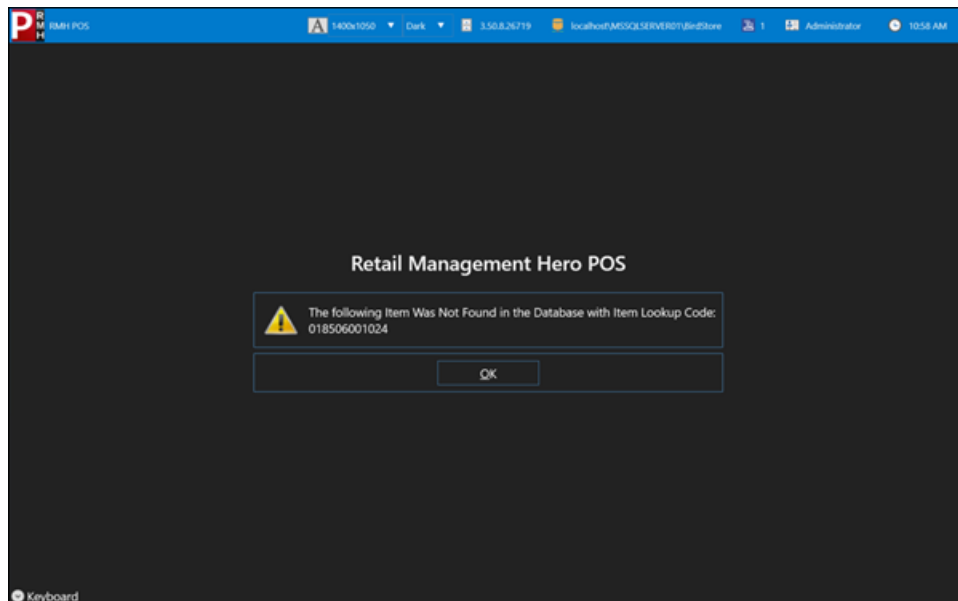
4. If you find the item on the **Item Lookup** screen, do one of the following to add it to the transaction:

- Tap the item once to select it and tap **Select**.

- Tap the item twice.

Working with items in the transaction screen

Once you have mastered adding items to transactions, you will want to learn how to perform common tasks such as:

- Changing item quantities

- Duplicating items

- Looking up item availability and pricing

- Sorting the item list

- Turning item roll up on and off

- Deleting items from the item list

Pre-requisites: If the **Do not allow to access the Action button** option is selected for the user, they will not be able to see or use the Action button.

Changing the item quantity

1. Tap the **Action** button beside the item.
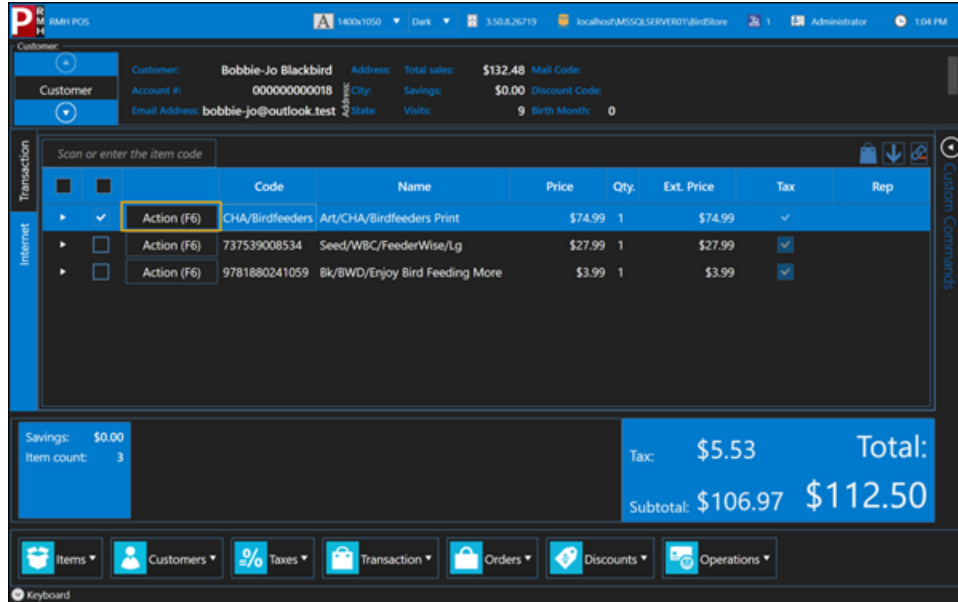
2. On the **Item Action** screen, do one of the following:

    ▪ Tap the **+** or **-** buttons until the correct item quantity displays.

    ▪ Manually enter the correct item quantity.
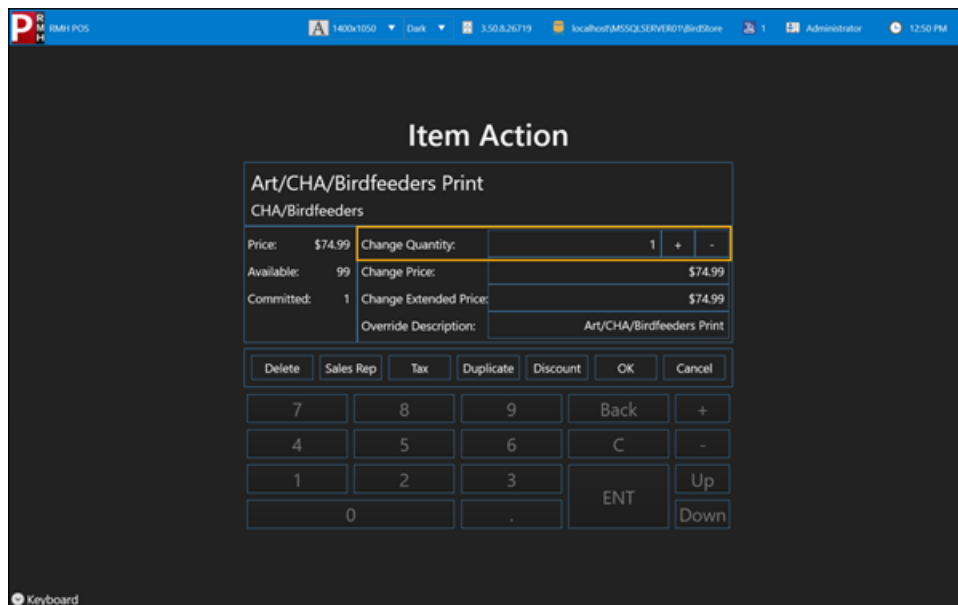
3. Tap **OK**.

Duplicating items

1. Tap the **Action** button beside the item.
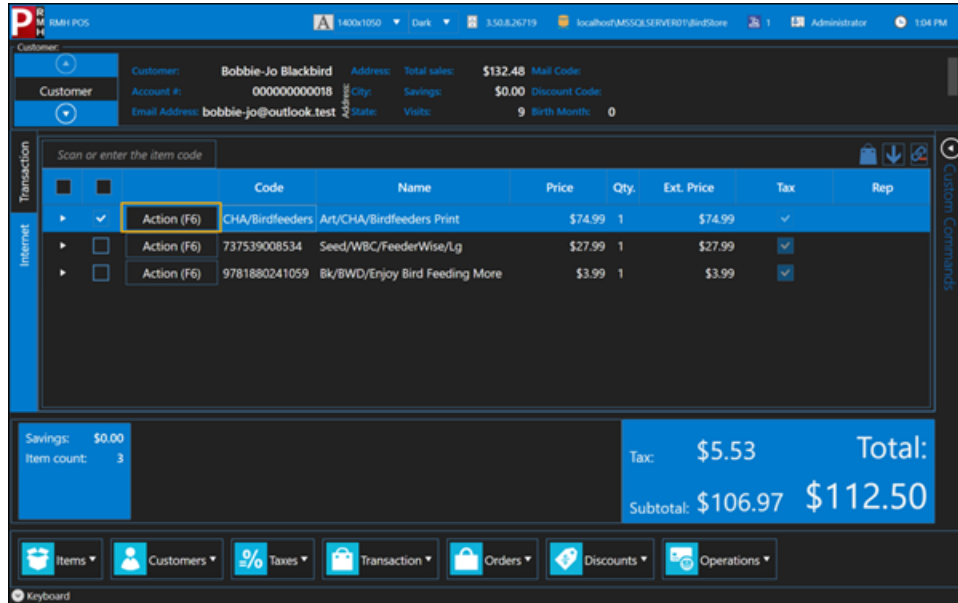
2. On the **Item Action** screen, tap **Duplicate**.
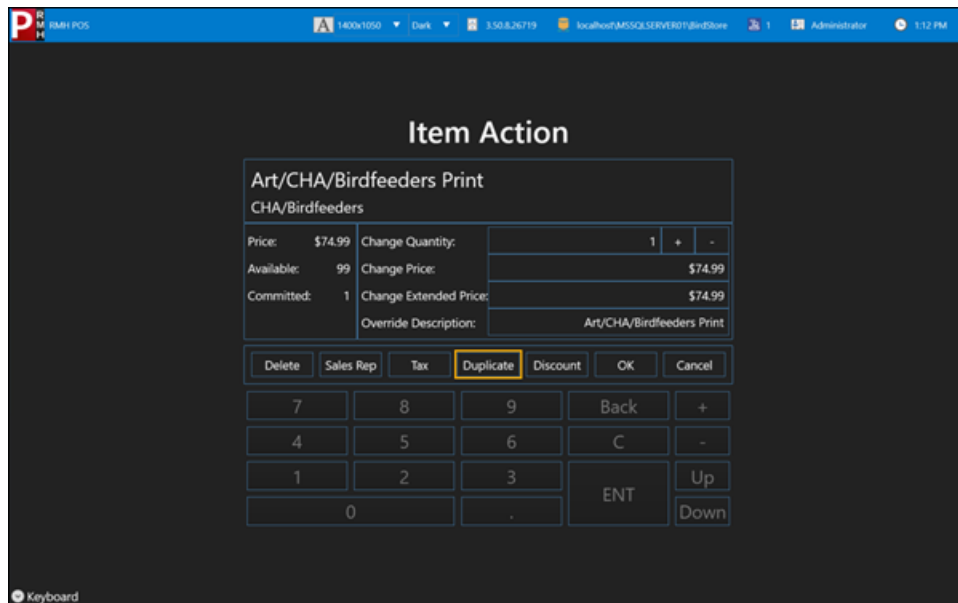
3. Tap **OK**. The duplicate item is added to the transaction screen.
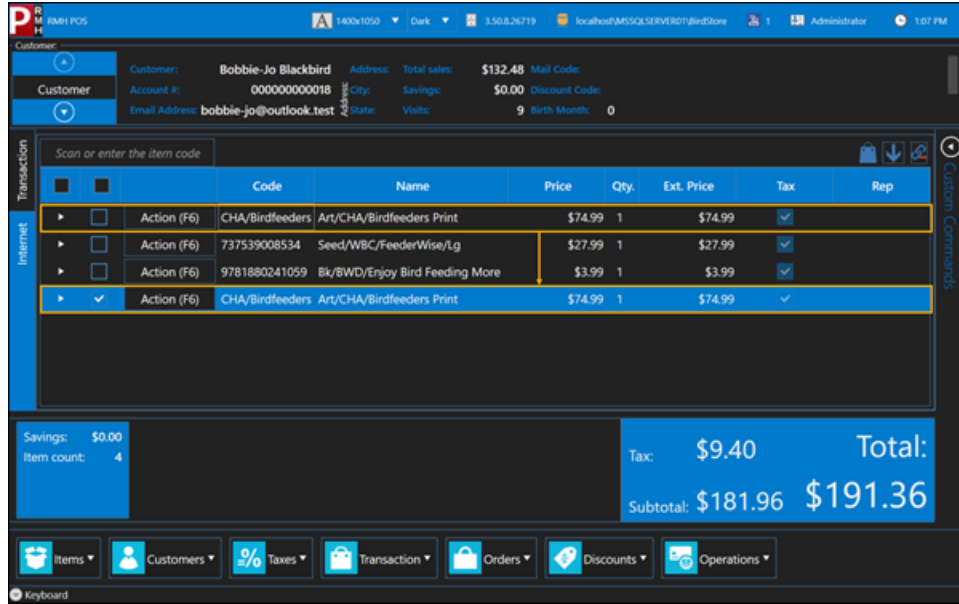
Looking up item availability and pricing

Sometimes a customer will ask you to look up an item's availability or whether it's on sale. There are two ways to look up this information.

> **Pre-requisites:** The **Enable line item detail row** option must be enabled in the **POS Profile** connected to the register to see the line item details row.

Option 1: If line item details have been enabled for your register, tap the arrow to the left of the item to display availability and pricing information below the item.
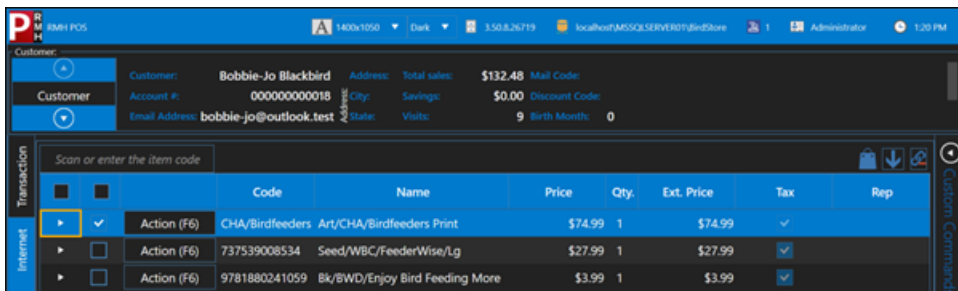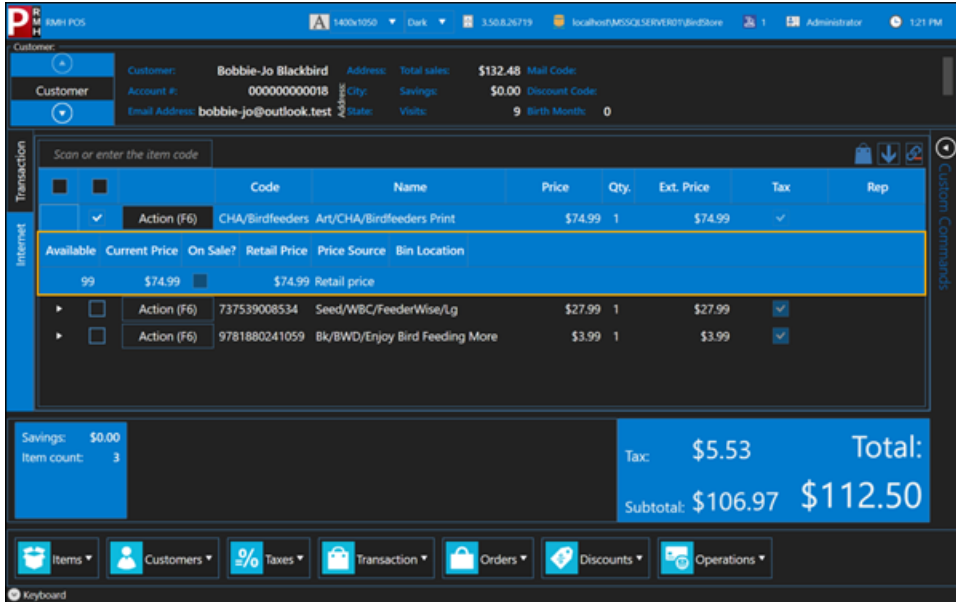
Option 2: If line item details are not enabled for your register, tap the **Action** button beside the item. You can see availability and pricing information on the **Item Action** screen.
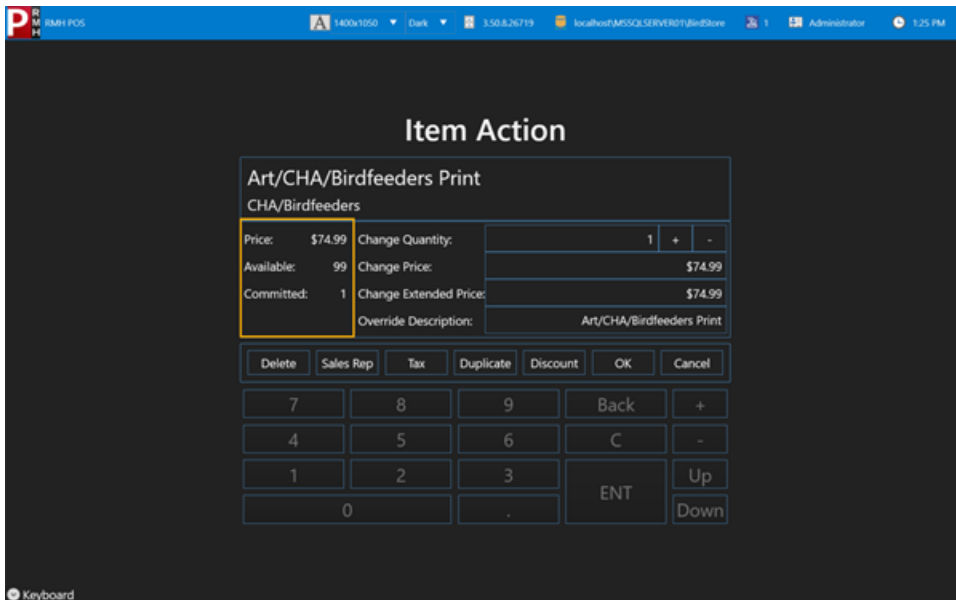
Sorting the item list

Depending on how you have sorted the item list, new items are either added at the top of the item list or at the bottom of the item list. Select the sort order you prefer.
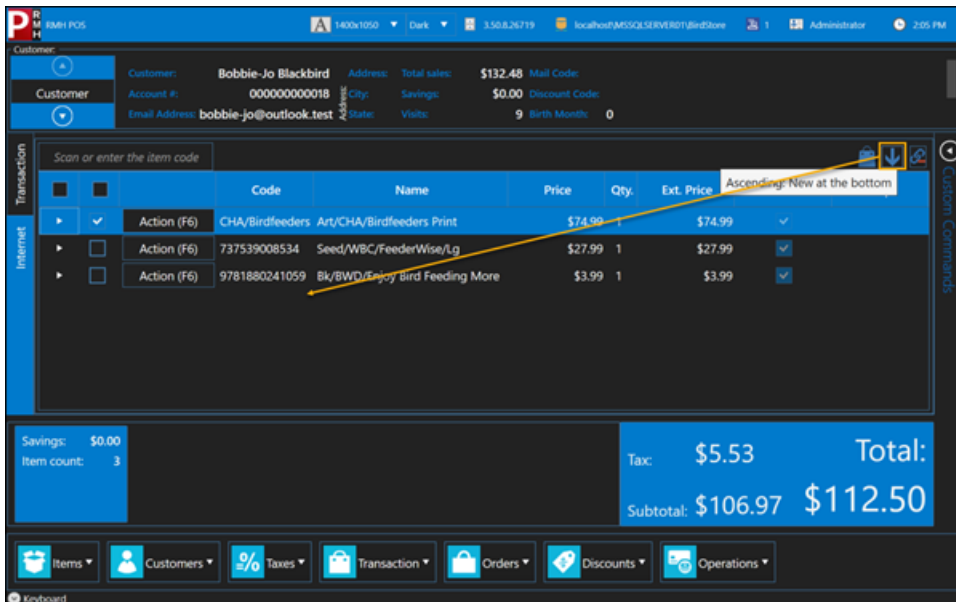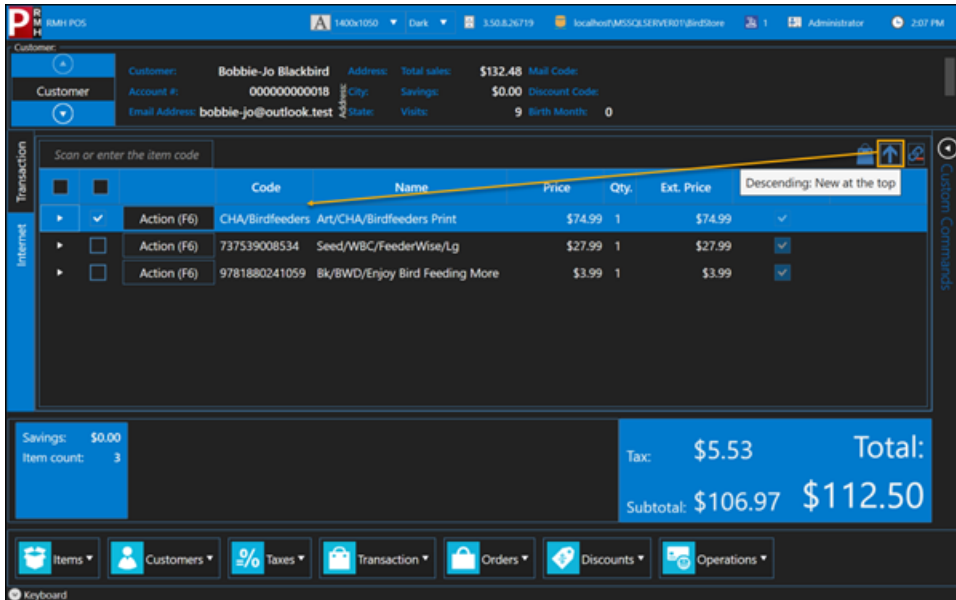
Turning item roll up on an off

Item roll up is a way to make the item list shorter.

If roll up is turned on and the customer purchases two or more of the same item, the item displays in one line in the item list, and the quantity increases to show how many of the item the customer is purchasing. If roll up is turned off, each item displays on a separate line in the transaction list, with a quantity of 1 per line.

Deleting items from the item list

> **Pre-requisites:** You must have the **Allowed to delete entries from transactions** permission to delete items from the transaction item list in POS.

There are two ways that you can delete items from the item list:

- Tap the item once to select it and tap **Delete**.

- Tap the **Action** button beside the item, and on the **Item Action** screen, tap **Delete**.

Adding a comment to an item

1. Enter all of the items in the transaction.

2. Tap the item to select it.

3. Tap **Items | Item Comment**.

4. On the **Item Comment** screen:

   a. Enter the **Comment**.
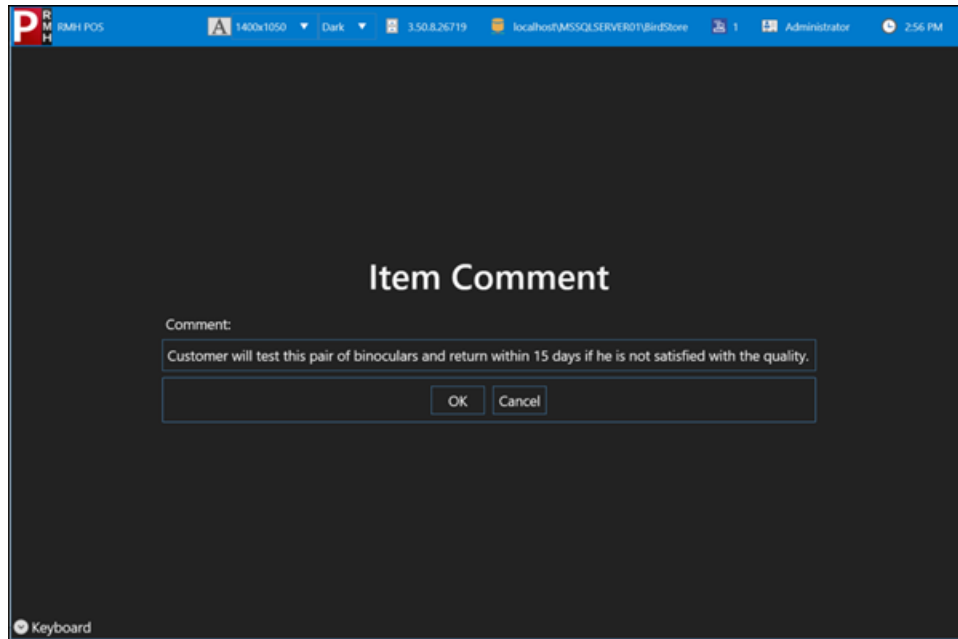
b. Tap **OK**.

5. Tap **Transaction | Tender Sale** or press **F12**.

6. Enter the amount next to the appropriate tender type.

7. Tap **OK**.

8. Tap **Yes** to print the receipt.

   The receipt shows the item comment below the item.

```
              Demo Store - Bird
            12446 Bethesda Ave1
             Bethesda MD 20812
                301-555-1212

              Sales Receipt

Transaction #:        45
Account #:            000000000010
Date:  2023-10-25    Time:  2:58 PM
Cashier:   1          Register #:   1

Item       Description                    Amount
========   ------------------------   -------------
6371481037 Opt/ALP/Shasta 10x42 BaK4      $199.99
           Wtrp
           Customer will test this pair of
           binoculars and return within 15
           days if he is not satisfied with
           the quality.
6371481037 Opt/ALP/Shasta BaK4 8x42       $189.99
           Wtrpr
                                      =============
                      Sub Total           $389.98
           Hawaii General Sales Tax        $16.25
                 Maui Local Tax             $3.90
                        Total             $410.13

             Credit Card Tendered        $410.13
                    Change Due             $0.00

              ║█║██║║█║██║█║█║
                      45
           Thank you for shopping
             Demo Store - Bird
        We hope you'll come back soon!
```

Tendering a sale

After you have entered all of the items and the customer is ready to pay, you can tender the sale (also known as accepting payment).

1.   Tap **Transaction | Tender Sale** or press **F12** or **Enter**.

2.   On the **Tender** screen, enter the tender amount next to the relevant tender type.

> **Tip:** If the customer is paying the entire amount using one tender type, you do not have to enter the amount. Instead, tap in the amount field next to the appropriate tender type and press + on the keyboard. POS automatically enters the full amount of the transaction for that tender type.

You can accept more than one tender type for a transaction. For example, a customer may want to pay for a larger purchase using a combination of cash and credit card.
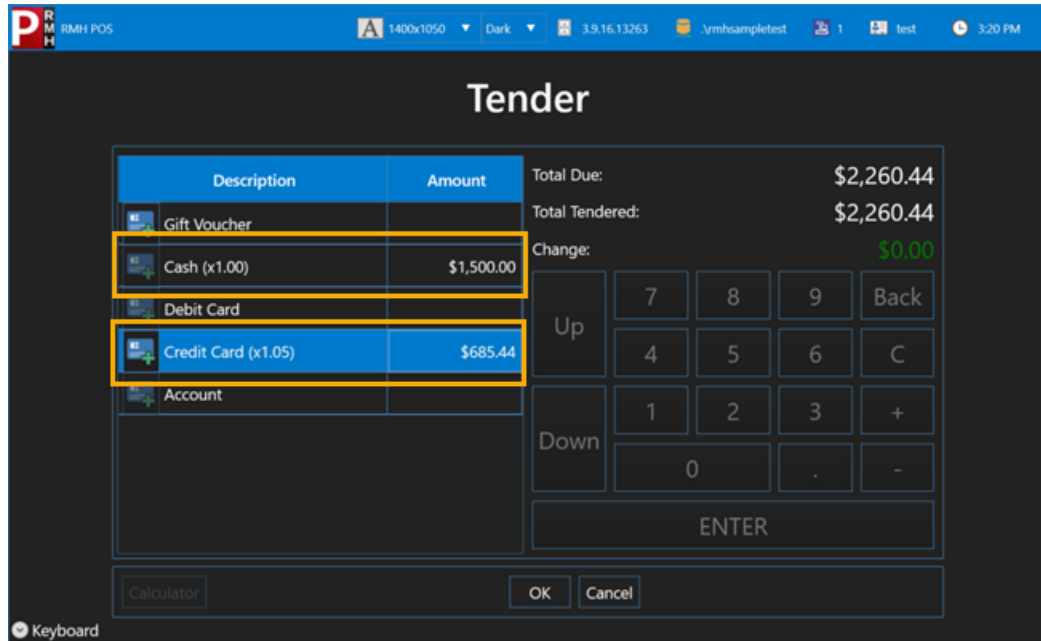
You may also be able to accept two or more forms of the same tender type. For example, a customer may want to split a purchase between two different credit cards. If your store allows multiple entries for tender types, tap the green + icon next to the tender type to add a new row.
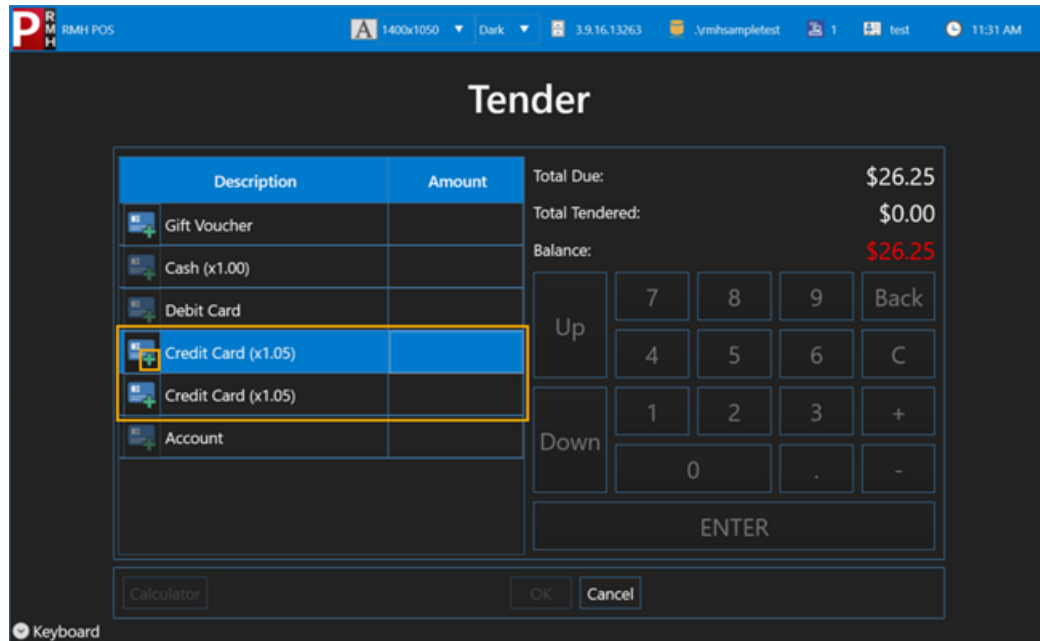
3. Tap **OK**.

4. If the customer wants a receipt, tap **Yes** to print the receipt.

```
          RMH Sample ·
        7727 Lake Underhill Road
           Orlando FL 32899
            (407) 303-8110
            (407) 303-8110

         ┌─────────────────────┐
         │    Sales Receipt    │
         └─────────────────────┘

Transaction #:          4326
Date:  2021-11-16    Time:  3:22 PM
Cashier:  test        Register #:  1

Item      Description              Amount
========  ======================  =============
9002001   Trider Cycle Mens 20 Inch   $1,495.00
          20
          Blue
INT       Intact Cycle Helmet         $299.00
          OSFM
          ASSORTED
                                  =============
                Sub Total          $1,794.00
                      VAT            $358.80
                    Total          $2,152.80

             Cash Tendered         $1,500.00
       Credit Card Tendered          $685.44
                     Card:
                     Auth:
               Change Due              $0.00

          ║║║║║║║║║║║║║║║║║
               4326
       Thank you for shopping
            RMH Sample
     We hope you'll come back soon!
```

Tendering a sale using a voucher

1. Enter all of the items in the transaction.

2. Tap **Transaction | Tender Sale** or press **F12** or **Enter**.

3. On the **Tender** screen, enter the amount the customer wants to redeem from the voucher next to the **Voucher** tender type.

    The customer can redeem a portion of the voucher balance or the full voucher balance. The name of the **Voucher** tender type is customizable and may vary by store. Your store may call it Gift Voucher, Gift Card, Gift Certificate, or something else. In the example below, it's called Gift Voucher.

4. Tap **OK**.

5. If your store sells more than one type of voucher, on the **Select Voucher Item** screen tap the type of voucher the customer is presenting and tap **Select**.

6. On the **Voucher Verification** screen, tap in the **Number** field and enter the voucher number.

7. Tap **Search** or press **Enter**.

8. Tap **Select**.

9. Tap **Yes** to print the receipt.

The receipt shows the voucher number, previous balance, and new balance.

```
              RMH Sample
         7727 Lake Underhill Road
            Orlando FL 32899
             (407) 303-8110
             (407) 303-8110

             Sales Receipt

Transaction #:         4337
Date:  2021-11-18      Time:  12:44 PM
Cashier:  999          Register #:   1

Item      Description                 Amount
========  ======================= ============
WB        Water Mark Bottle           $15.95
          1LT
                                 ============
                  Sub Total          $15.95
                  VAT                  $3.04
                  Total              $18.99
          Gift Voucher Tendered       $18.99
                  Number:96
          Previous Balance           $25.00
          New Balance                 $6.01

                  Change Due          $0.00

            ‖‖‖‖‖‖‖‖‖‖‖‖‖‖‖‖
                  4337
          Thank you for shopping
          RMH Sample
          We hope you'll come back soon!
```

Tendering a sale using sequential tendering

If sequential tendering is enabled for the register, you can process payments for a transaction using a variety of tender types. Each payment is processed separately, in a sequence, until the full transaction amount is paid.

To process payments using sequential tendering:

1. Enter all of the items to the transaction.

2. Tap **Transaction | Tender Sale** or press **F12** or **Enter**.

3. On the **Tender** screen, enter the tender amount next to the first tender type, e.g., credit card.

4. Tap **Pay**.

5. Process the payment, e.g., follow the prompts on the POS terminal.

6. On the **Tender** screen, enter the tender amount next to the second tender type, e.g., debit card.

7. Tap **Pay**.

8. Process the payment, e.g., follow the prompts on the POS terminal.

    When the payment has been successfully processed, a green check mark displays beside the tender type and amount.
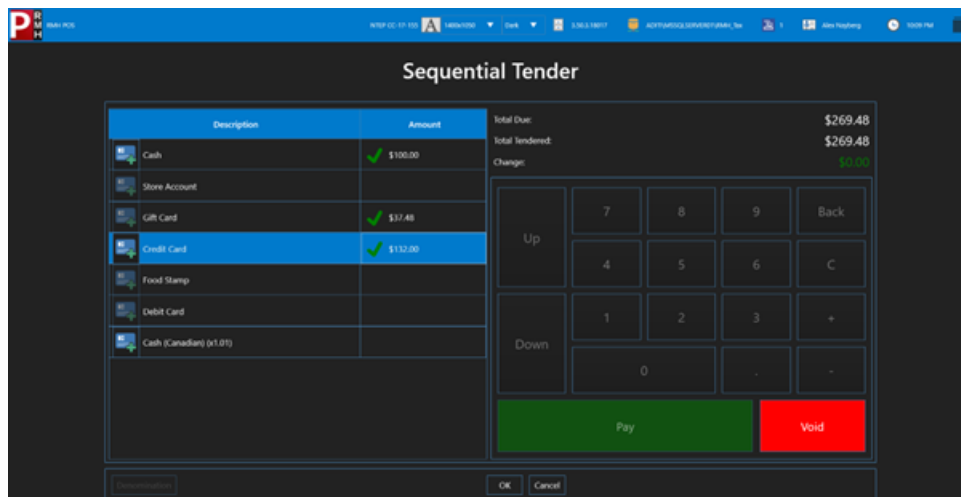
    If the payment cannot be processed, a green check mark will not display and you will not be able to complete the transaction until that amount is paid, either by using a different credit card, debit card, or gift card, or by using a different tender type.

9. Continue to enter tender amounts next to different tender types, tap **Pay**, and process the payment until the full transaction amount is paid.

    > **Tip:** If the customer is paying the remaining amount, click in the amount field next to the appropriate tender type and press **+** on the keyboard. POS automatically enters the remaining amount of the transaction for that tender type.

10. Tap **Yes** to print the receipt.

To void payments using sequential tendering:

Sometimes you will need to void a payment after it has been processed. For example, you might void a payment during sequential tendering if the customer realizes they used the wrong credit card or debit card.

Voiding a payment during sequential tendering is different from voiding a transaction. Refer to [Voiding transactions](#) for more information.

1. On the **Tender** screen, tap the payment you want to void to select it.

2. Tap **Void**. A void request is sent to the payment processor.

   When the payment is voided, the green check mark and the amount are deleted from beside the tender type. You should not have to do anything else to void the payment.

3. Tap **OK**.

   Tip: You can repeat the steps above to void all payments and cancel out of sequential tendering. For example, you might do this if the customer wants to add an item to the transaction at the last minute.

Reprinting receipts

Sometimes a customer will say they do not want a receipt and then change their mind and ask for a receipt. You can reprint the sales receipt or a gift receipt. This topic describes several ways to reprint receipts.

Pre-requisites: You must have the **Allowed to review printed Journals** permission to look up receipts in the Journal in POS.

If you have just completed the transaction:

1. Do one of the following:

   - Tap **Transaction** | **Receipt** | **Reprint**.

   - Tap **Transaction** | **Receipt** | **Reprint Gift**.

2. If prompted, tap the printer to select it and tap **OK**.

```
              DUPLICATE RECEIPT


                Demo Store - Bird
              12446 Bethesda Ave1
              Bethesda MD 20812
                 301-555-1212

                 Sales Receipt

Transaction #:          40
Date:  2023-10-12    Time:  10:20 AM
Cashier:  1          Register #:  1

Item      Description              Amount
========  =====================  ============
TBC/MEALV Fdw/TBC/1000 Mealworms w/   $13.99
          Cup
                              ============
                Sub Total        $13.99
        Hawaii General Sales Tax   $0.58
             Maui Local Tax        $0.14
                   Total          $14.71

          Credit Card Tendered    $14.71
              Change Due           $0.00

          ‖‖‖‖‖‖‖‖‖‖‖‖‖‖‖‖‖‖
                   40
        Thank you for shopping
           Demo Store - Bird
      We hope you'll come back soon!
              DUPLICATE RECEIPT
```

If the transaction was completed for a specific customer:

1. Tap **Customers** | **Lookup Customer**.

2. Type all or part of the customer's name and press **Enter**.

3. To select the customer, do one of the following:

- Tap the customer's name once and tap **Select**.

- Tap the customer's name twice.

4. Tap **Customers | Edit Customer**.

5. Tap the **Purchases** tab.

6. Tap the transaction number in the **#** column.
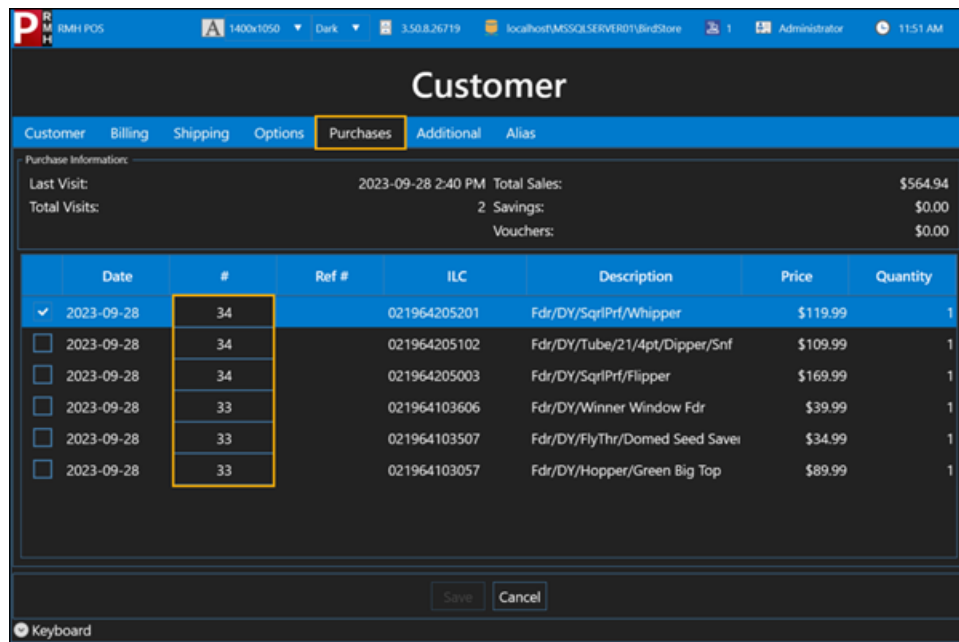
7. Do one of the following:

- Tap **Print** to reprint a duplicate sales receipt.

- Tap **Print Gift Receipt** to reprint a gift receipt.
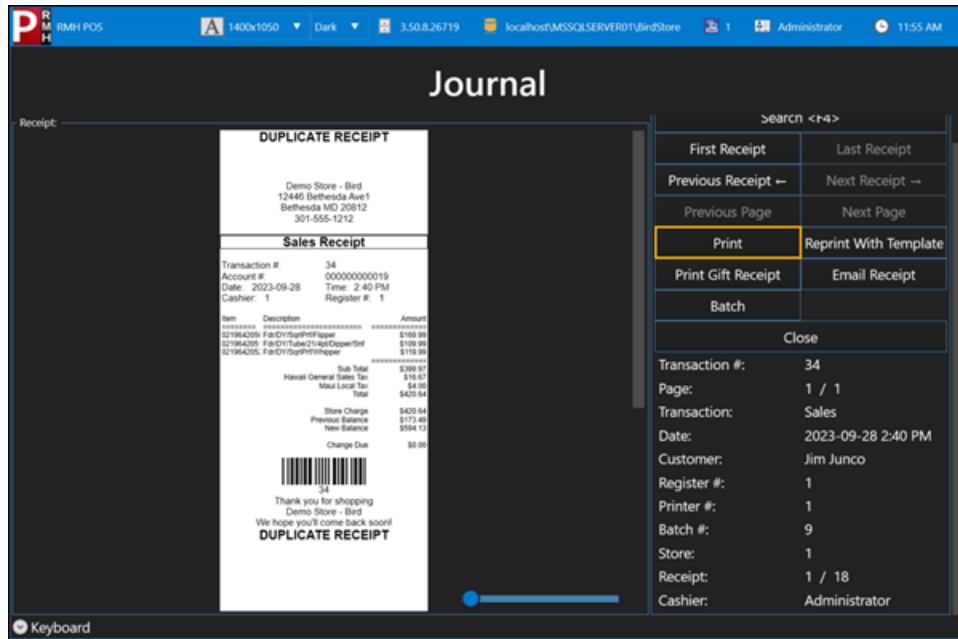
8. If prompted, tap the printer to select it and tap **OK**.

If the transaction was completed earlier in the day (e.g., in the current open batch):

1. Tap **Transaction** | **Receipt** | **Journal**.

    The journal contains all transactions for the store. Transactions in the journal are organized into batches. A unique batch number is assigned to each register when it is opened. This batch remains open until a Z report is generated to close the register.

2. Use the navigation options to find the transaction.

    For example, if the transaction was completed within the previous 30 minutes, you might tap Previous Receipt to search through the most recent transactions. However, if the transaction was completed at the beginning of your shift, you might tap First Receipt to jump to your first transaction of the day and then tap Next Receipt to search through the earliest transactions.
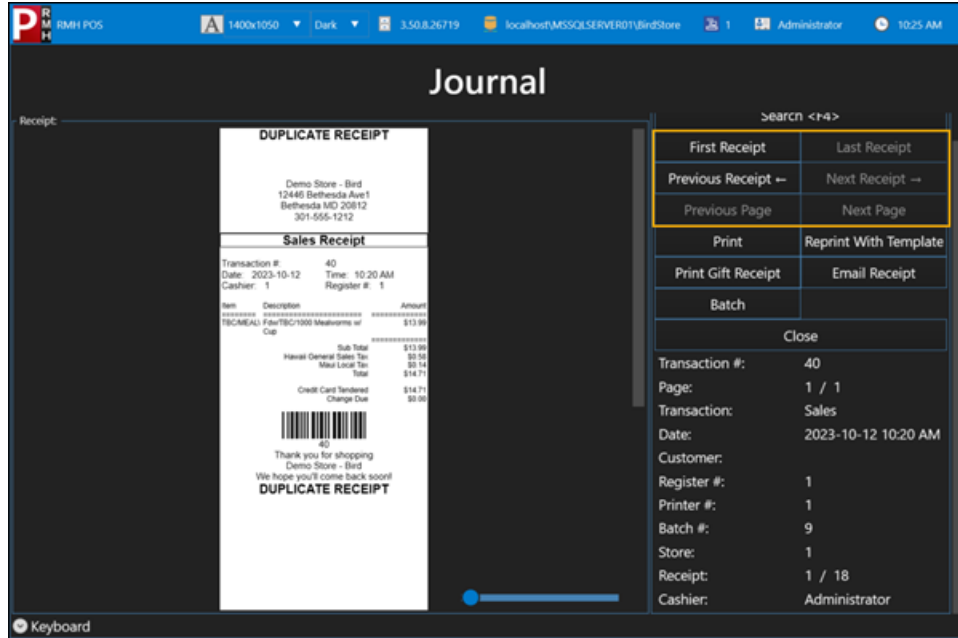
3. When you find the customer's transaction, do one of the following:

- Tap **Print** to reprint a duplicate sales receipt.

- Tap **Print Gift Receipt** to reprint a gift receipt.
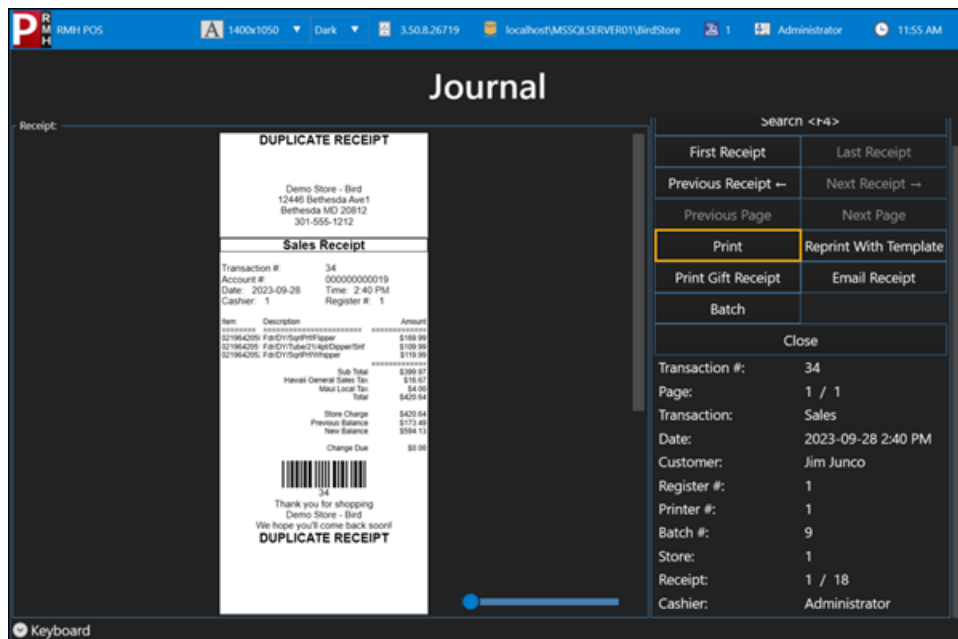
4. If prompted, tap the printer to select it and tap **OK**.

If the transaction was completed on a different shift or date (e.g., in a closed batch):

1. Tap **Transaction** | **Receipt** | **Journal**.

   The journal contains all transactions for the store. Transactions in the journal are organized into batches. A unique batch number is assigned to each register when it is opened. This batch remains open until a Z report is generated to close the register.

2. Tap **Batch**.
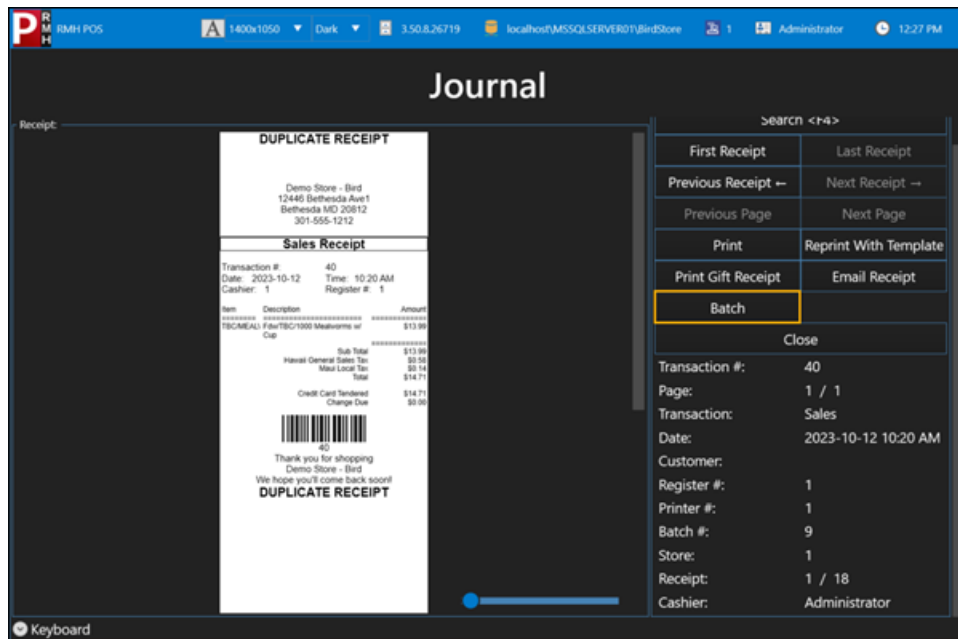
3. Scroll through the list of batches until you find the correct batch.

4. Use the navigation options to find the transaction in the batch.
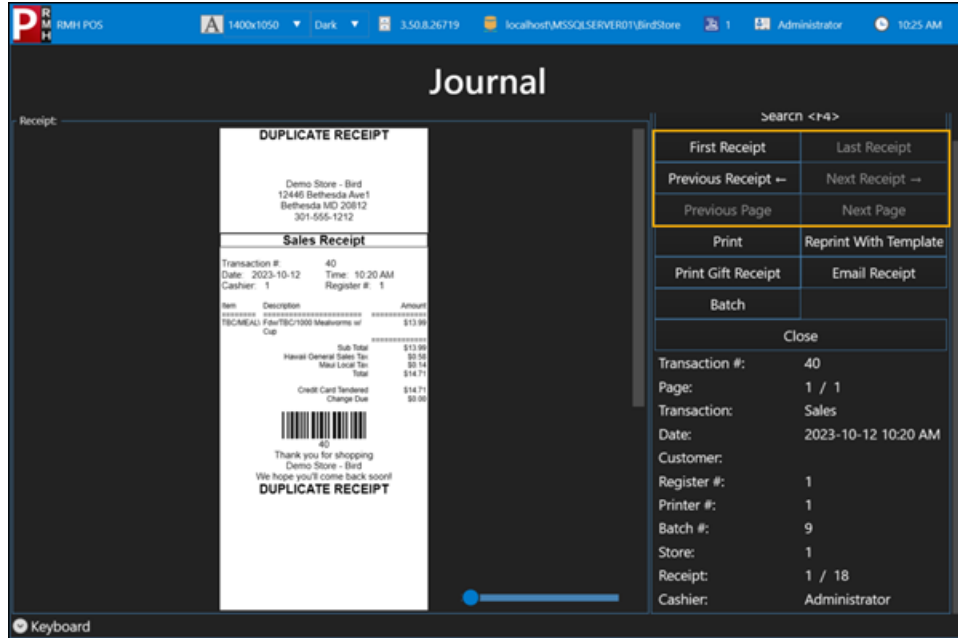
5. When you find the customer's transaction, do one of the following:

   ▪ Tap **Print** to reprint a duplicate sales receipt.

   ▪ Tap **Print Gift Receipt** to reprint a gift receipt.
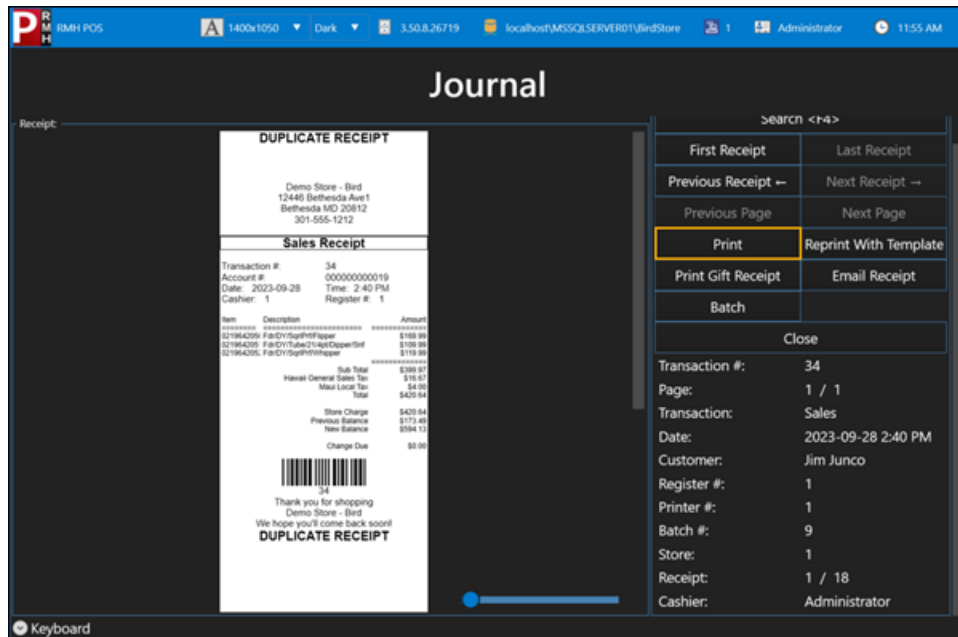
6. If prompted, tap the printer to select it and tap **OK**.

Entering sales representatives

Depending on your store's policies, you may need to enter sales representatives for some or all transactions in POS.

1. Enter all of the items in the transaction.

2. To enter a sales representative for all items in the transaction, tap **Transaction** | **Sales Reps** | **Transaction Sales Rep**.

3. To enter a sales representative for specific items in the transaction, do one of the following:

    ▪ Tap the item once to select it and tap **Transaction** | **Sales Reps** | **Current Item Sales Rep**.

    ▪ Tap the **Action** button next to the item and tap **Sales Rep**.

4. On the **Sales Rep Lookup** screen, do one of the following:

    ▪ Tap the sales rep's name once to select them and tap **Add**.

    ▪ Tap the sale rep's name twice.

    The sales representative's name displays next to the item.
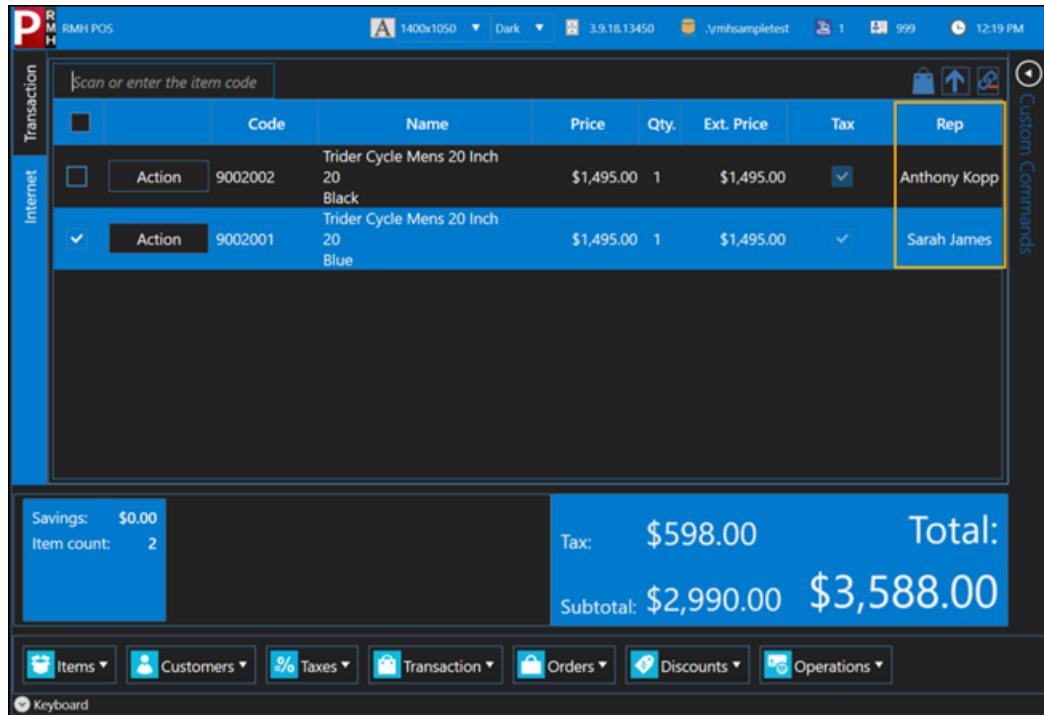
5. Tender the sale.

Adding a comment to a transaction

1. Enter all of the items in the transaction.

2. Tap **Transaction** | **Transaction Comment**.

3. On the **Transaction Comment** screen:

   a. (Optional) Enter a reference number in the **Ref #** field.
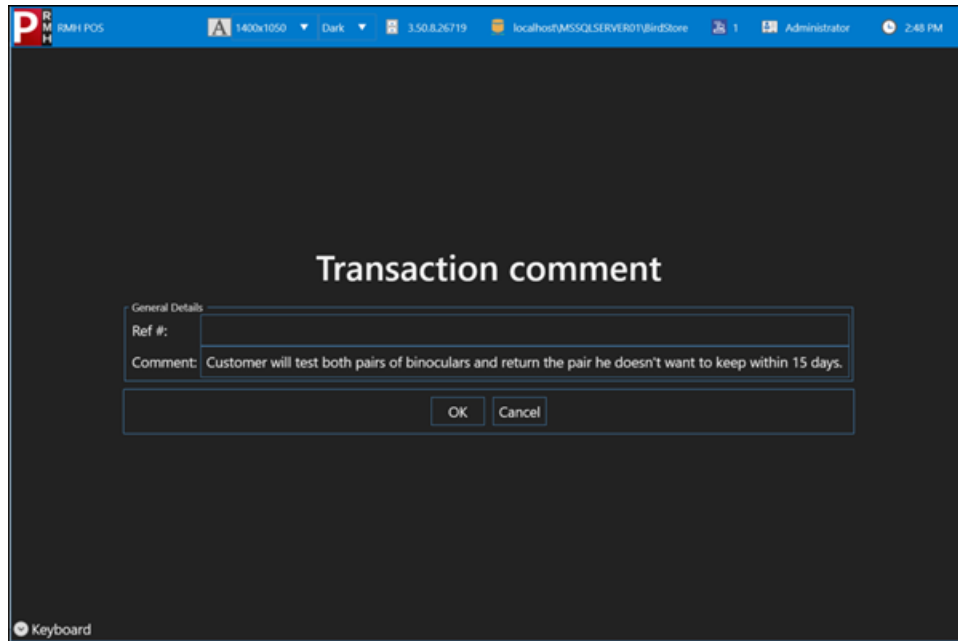
   b. Enter the **Comment**.

    c.   Tap **OK**.

4.   Tap **Transaction** | **Tender Sale** or press **F12**.

5.   Enter the amount next to the appropriate tender type.

6.   Tap **OK**.

7.   Tap **Yes** to print the receipt.

    The receipt shows the transaction comment at the top.

```
        Demo Store - Bird
        12446 Bethesda Ave1
         Bethesda MD 20812
           301-555-1212

        Sales Receipt

Transaction #:        44
Account #:            000000000010
Date:  2023-10-25    Time:  2:50 PM
Cashier:   1         Register #:   1

┌─────────────────────────────────────┐
│ Customer will test both pairs of     │
│ binoculars and return the pair he    │
│ doesn't want to keep within 15       │
│ days.                                │
└─────────────────────────────────────┘

Item     Description              Amount
======== ====================== ========
6371481037 Opt/ALP/Shasta 10x42 BaK4  $199.99
           Wtrp
6371481037 Opt/ALP/Shasta BaK4 8x42   $189.99
           Wtrpr
                               ============
               Sub Total          $389.98
    Hawaii General Sales Tax       $16.25
           Maui Local Tax           $3.90
                  Total           $410.13

       Credit Card Tendered       $410.13
             Change Due             $0.00

          ║█║║█│║││║█║│█║║
                44
      Thank you for shopping
         Demo Store - Bird
   We hope you'll come back soon!
```

Changing taxes

You will usually only change taxes if the customer's purchase is being shipped or delivered to a region where different taxes apply to the purchase. For example, a customer might place an order over the phone and ask for their purchase to be mailed to them in a neighboring state. You would need to change the taxes from the taxes charged in the store's state to the taxes charged in the state where the purchase will be delivered. Follow your store's policies for changing taxes.

> **Pre-requisites:** You must have the **Allowed to change tax status** permission to change taxes in POS.

To change taxes for the entire transaction:

1. Enter all of the items in the transaction.

2. Tap **Taxes | Transaction Tax | Set Transaction Tax**.

3. Tap the appropriate tax to select it and tap **Add**.

4. If prompted, tap the appropriate reason code to select it and tap **OK**.

To change taxes for a specific item:

1. Enter all of the items in the transaction.

2. Tap the item to select it.

3. Tap **Taxes | Current Item Tax | Set Current Item Tax**.

4. Tap the appropriate tax to select it and tap **Add**.

5. If prompted, tap the appropriate reason code to select it and tap **OK**.

Removing taxes

Items that are exempt from taxes, such as certain groceries or pharmacy items, are configured to be tax exempt in Store Manager. When these items are added to transactions in POS, taxes are not applied to them. (Taxes will be applied to any taxable items in the transaction, however.)

You should only remove taxes from a transaction or from specific items in a transaction if the customer, such as a school or church, is exempt from paying taxes. Follow your store's policies for removing taxes.

Pre-requisites: You must have the **Allowed to change tax status** permission to remove taxes in POS.

To remove taxes for the entire transaction:

1. Enter all of the items in the transaction.

2. Do one of the following:

   ▪ Tap **Taxes** | **Transaction Tax** | **No Tax**.

   ▪ Tap **Taxes** | **Transaction Tax** | **Tax On/Off**.

3. If prompted, tap the appropriate reason code to select it and tap **OK**.

   > **Note:** If you are unsure whether you removed the tax from the transaction, look at the **Tax** amount in transaction summary below the transaction list. It should be $0.00.

To remove taxes for a specific item:

1. Enter all of the items in the transaction.

2. Tap the item to select it.

3. Tap **Taxes** | **Current Item Tax** | **Current Item Tax On/Off**.

4. If prompted, tap the appropriate reason code to select it and tap **OK**.

   > **Note:** If you are unsure whether you removed the tax from the item, look in the **Tax** column to the right of the item name and price. If there is a check mark in the **Tax** column, taxes are being applied to the item. If there is no check mark, taxes are not being applied to the item.

Putting a transaction on hold

When you put a transaction on hold, POS saves and then exits the incomplete transaction. You have the option to recall the transaction at a later date to complete it and tender the sale. For example, you might put a transaction on hold if a customer forgot their wallet in their car and has to run to their car to retrieve it. You can continue to

process transactions for other customers in line until the customer returns with their wallet and you can tender the sale.

> **Pre-requisites:** You must have the **Allowed to put transactions on hold** permission to put a transaction on hold in POS.

1. Complete as much of the transaction as possible.

2. Tap **Transaction** | **Hold**.

3. If prompted, enter an **On Hold Comment** and tap **OK**.

Recalling a transaction from hold

If a transaction was previously put on hold, you can recall it to complete it and tender the sale.

1. Tap **Transaction** | **Recall Transaction** | **Recall from hold**.

2. Look up the transaction by doing one of the following:

   - Enter the transaction number, customer name, or account number (or a combination) and press **Enter**.
   - Scroll through the list of transactions until you find the correct one.

3. Tap the transaction to select it and tap **Add**.

4. Complete the transaction, as required.

5. Tender the sale.

Canceling transactions

You can cancel transactions at any time up to the point of tendering. You cannot cancel a transaction if you have already tendered the sale. (If you have already tendered the

sale, you need to void the sale instead.) Follow your store's policies and procedures for canceling transactions.

> **Pre-requisites:** You must have the **Allowed to abort transactions** permission to cancel a transaction.

1. Do one of the following:

    - Press **Esc**

    - Press **F8**

2. Tap **Yes** to confirm you want to cancel the transaction.

3. If prompted, tap the appropriate reason code to select it and tap **OK**.

Voiding transactions

Sometimes you will need to void a transaction after you tender it. For example, you might void a transaction if the customer realizes they used the wrong credit card to pay for the purchase and they want to put the purchase on a different card. Follow your store's policies and procedures for voiding transactions.

You cannot void part of a transaction. When you void a transaction, the entire transaction is voided. If you need to refund part of a transaction (for example, to remove items or change quantities), you should recall the transaction for return.

> **Note:** You cannot void transactions if the option **Do not allow to return or void entries from transaction** is selected for your user account.

1. Tap **Transaction | Recall Transaction | Recall for Void**.

2. Look up the transaction by doing one of the following:

- Enter the transaction number, customer name, or account number (or a combination) and press **Enter**.

- Scroll through the list of transactions until you find the correct one.

3. Tap the transaction to select it and tap **Add**.

4. If prompted, tap the appropriate reason code to select it and tap **OK**.

5. Confirm that the tender amounts and tender types match the original transaction.

The tender amounts appear as negative amounts (with parentheses around the amount).

6. Tap **OK**.

```
              Demo Store - Bird
             12446 Bethesda Ave1
              Bethesda MD 20812
               301-555-1212
_____
                   Void
_____
Transaction #:        38
Account #:            000000000006
Date:  2023-10-12     Time:  10:09 AM
Cashier:  1           Register #:  1

Item     Description              Amount
======== ====================== =============
630088501( Suet/WBC/Pecan Seed Cake    -$8.97
           10oz
           Return Code: RET-VOID
           -3 @ $2.99
630088400( Fdr/MRB/Basket 8 oz         -$4.99
           Return Code: RET-VOID
           -1 @ $4.99
630088404( Suet/WBC/ PatioWise Cake    -$3.99
           10oz
           Return Code: RET-VOID
           -1 @ $3.99
630088402( Suet/WBC/Birdwise Cake 8oz  -$2.79
           Return Code: RET-VOID
           -1 @ $2.79
                              =============
            Sub Total           -$20.74
   Hawaii General Sales Tax       -$0.86
          Maui Local Tax          -$0.21
                Total            -$21.81

         Change Credit Card       $15.00
            Change Cash            $6.81

        ||||| ||||||| ||||| |||
                   38
        Thank you for shopping
           Demo Store - Bird
      We hope you'll come back soon!
```

> **Note:** Voided debit card transactions are processed as returns. This is because the funds have already been deducted from the customer's bank account and cannot be voided.

Performing a cashier override

Depending on your user permissions, you may not be able to perform certain tasks in POS. For example, you may not have permission to perform advanced cash drawer management tasks like "no sale" transactions, cash drops, or payouts.

If you do not have permission to perform a task in POS, you can ask someone with more permissions than you - usually a senior cashier or a manager - to perform a

cashier override so you can complete the task. During a cashier override, the other employee will temporarily log in to POS using their login credentials and either complete the task themselves or supervise you while you complete the task.

1. Tap **Operations | Secure | Cashier Override**.

2. The senior cashier or manager enters their **User ID** and **Password**.

3. Tap **Login**.

   POS is now operating in cashier override mode, which means that you have all of the permissions assigned to the person who logged in. A cashier override notification displays on the screen.
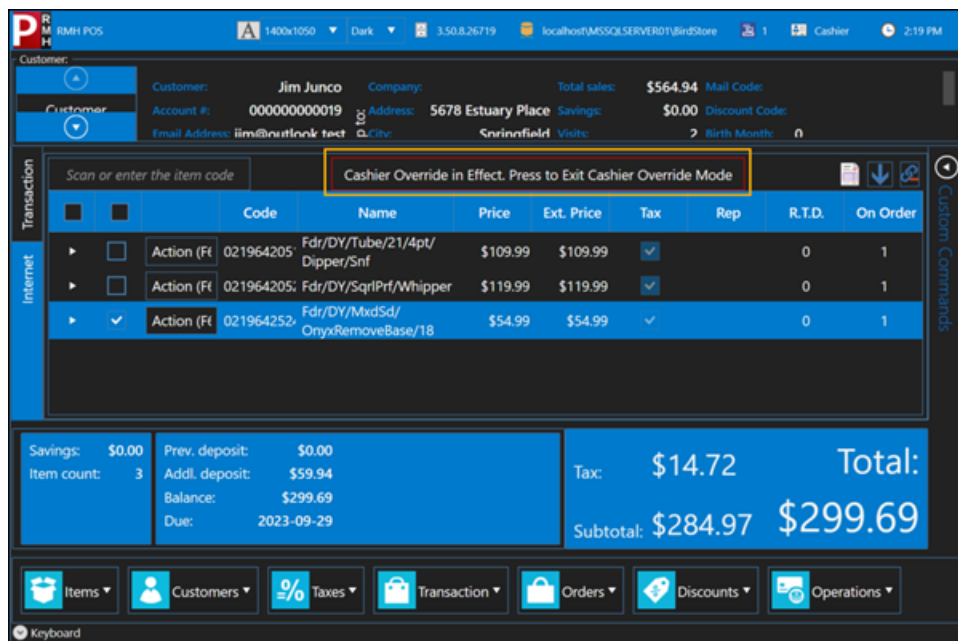
4. Complete the task.

5. Tap the cashier override notification to exit cashier override mode.

Processing transactions with employee discounts

Depending on your store's policies, employees may be qualify for a discount on specific items sold in the store. There are two ways to apply employee discounts in POS:

- (Recommended) Add the employee to POS as a customer and specify a discount in their customer record. This discount is automatically applied to the transaction when the customer record is selected.

- Enter items in a transaction and manually select a discount to apply a discount to the transaction.

Pre-requisites: You must have the **Allowed to sell to employees with discounts** permission to process transactions with employee discounts in POS.

If the employee discount is specified in a customer record:

1. Tap **Customers** | **Lookup Customer** or press **F7**.

2. To select the employee, do one of the following:

   - Tap the employee's name once and tap **Select**.
   - Tap the employee's name twice.

3. Enter all of the items in the transaction.

   The discount is automatically applied and the price that displays is the discounted price. The total savings from the employee discount displays in the lower left corner of the screen.
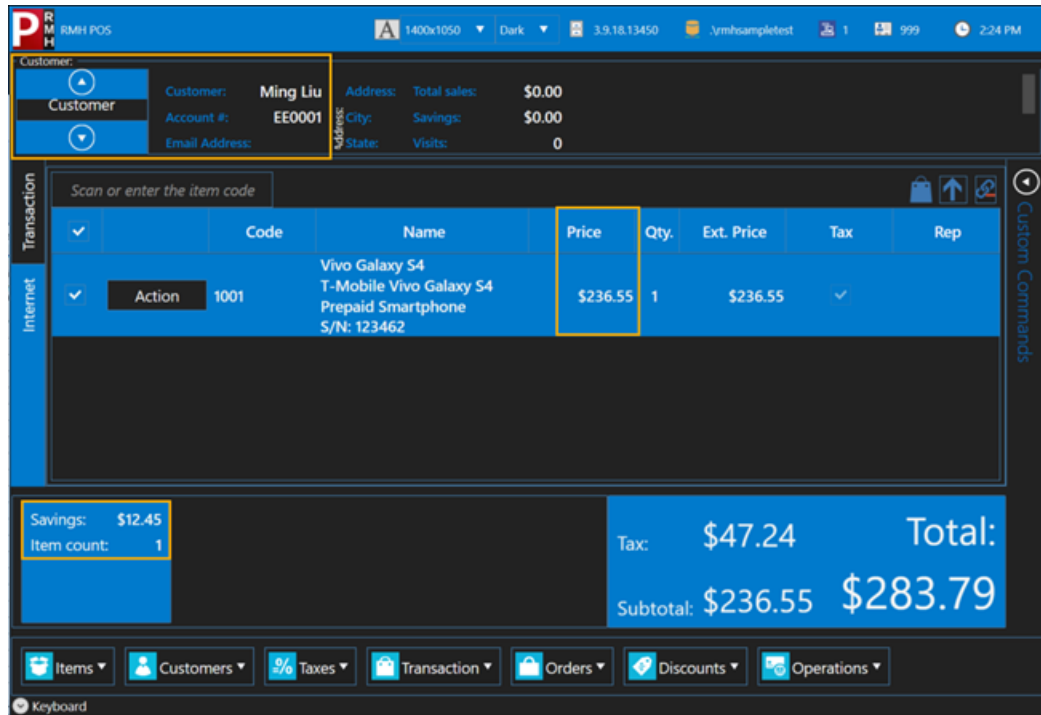
4. Tender the sale.

If the employee discount is manually selected for the transaction:

1. Enter all of the items in the transaction.

2. Do one of the following:

   ▪ Tap **Discounts** and select the appropriate discount type.

   ▪ Tap the **Action** button next to the item and tap **Discount**. Enter the percentage discount and tap **OK**.

3. If prompted, tap the appropriate discount reason code to select it and tap **OK**.

4. Tender the sale.

Working with customers

Looking up customers

You may need to look up customers for sales transactions, quotes, and work orders.
You may also need to look up customers for specialized transactions like payments on
account, layaways, exchanges, and returns.

> **Pre-requisites:** You must have the **Allowed to view and edit all customers** per-
> mission to look up customers in POS.

1. Tap **Customers** | **Lookup Customer**.
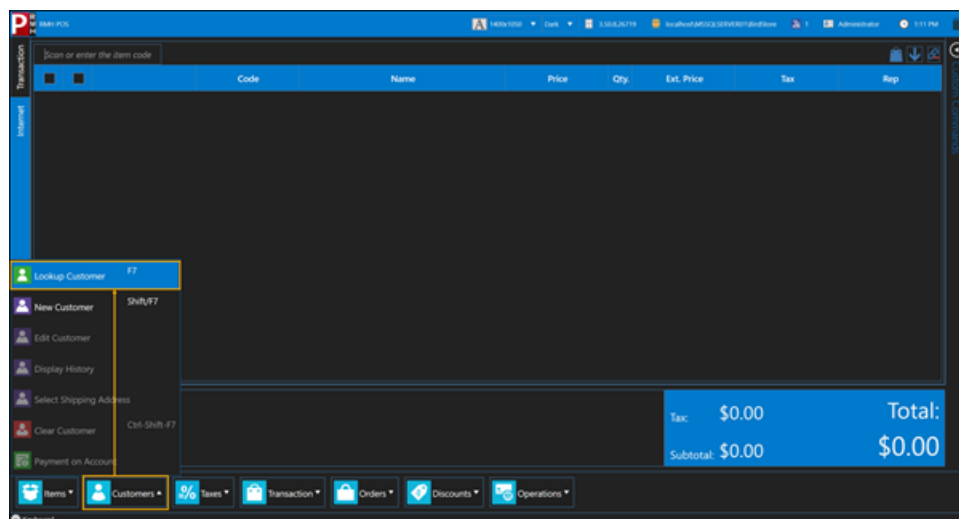
2. Type all or part of the customer's name and press **Enter**.

   If there are multiple ways to spell a customer's name, you can either ask them to
   spell out their name or you can try entering part of the name. For example, if the
   customer says their name is Bobbie-Jo Blackbird, you could try entering just Bob or
   Bob Black.
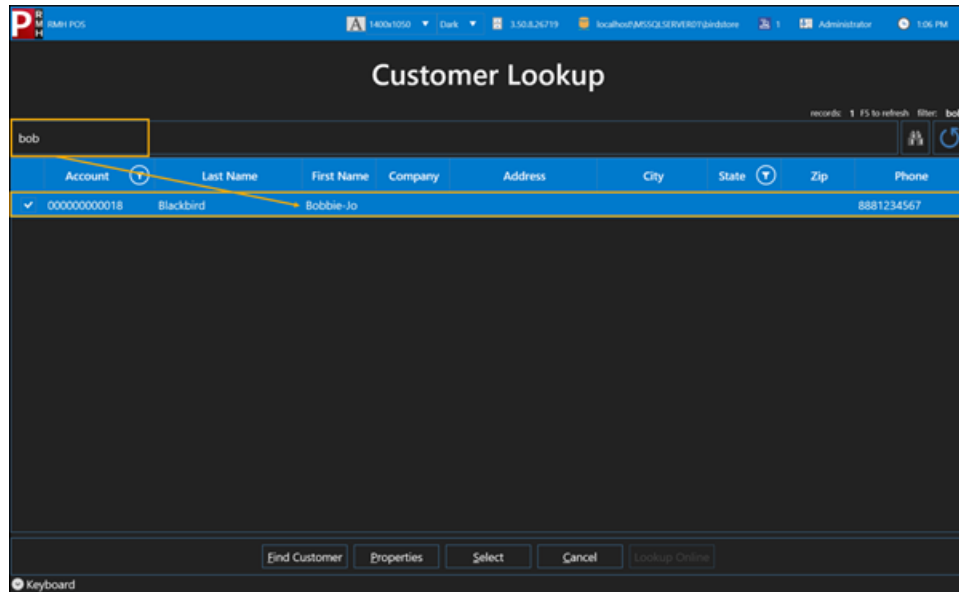
3. To select the customer, do one of the following:

- Tap the customer's name once and tap **Select**.

- Tap the customer's name twice.

   The customer's information displays in the **Customer** pane at the top of the POS screen.
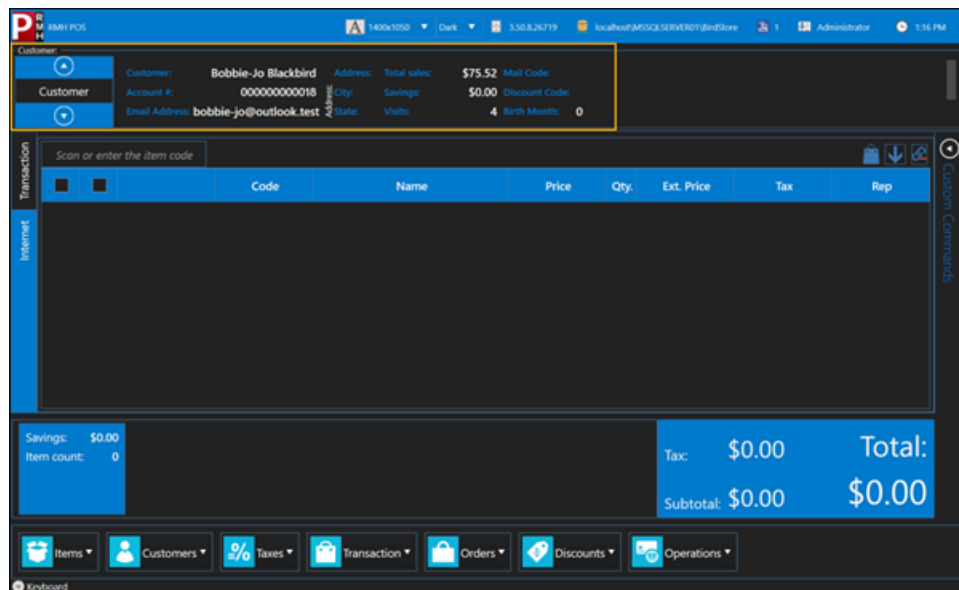
Adding customers

> **Pre-requisites:** You must have the **Allowed to view and edit all customers** permission to add customers in POS.

1. Tap **Customers** | **New Customer**.
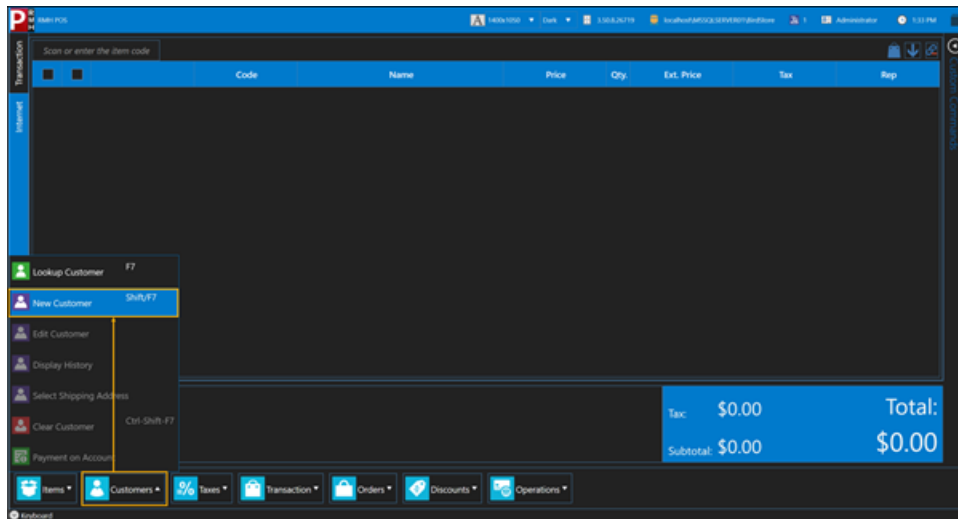
2. On the **Customer** tab, enter the customer's contact information, such as:

   ▪ Title

   ▪ First Name

   ▪ Last Name

   ▪ Company (if applicable)

   ▪ Email Address

   ▪ Phone

   > **Note:** If the field label is bold, it means the store has defined a customer policy requiring you to enter information into those fields. You cannot save the customer if those fields are empty.

3. (Optional) If your store offers store credit (also known as accounts receivable or AR) to customers, and the customer's application for store credit has been approved, select **Create A/R Account**. Refer to About store credit/accounts for more information.

4. (Optional) If the customer will be billed for purchases, go to the **Billing** tab and enter their billing address.

5. (Optional) If the store will ship (or deliver) purchases to the customer, go to the **Shipping** tab and enter their shipping address. Refer to Adding a shipping address for more information.

6. (Optional) On the **Options** tab, select any of the following options that apply to the customer:

    - **Exempt from taxes:** Select if the customer is exempt from paying taxes on purchases.

    - **Employee:** Select if the customer is an employee.

    - Enforce purchase limits:

    - **Price Level:** Select **Price A**, **Price B**, or **Price C** if the customer is approved for a price level discount. Select **Standard** if the customer is not approved for a price level discount.

    - **Discount (%):** Enter a percentage if the customer is approved for a percent discount.

> **Warning!** This percent discount is applied to all items the customer purchases. If you want to limit discounts on items, consider using price level discounts or adding discounts in POS at the point-of-sale.

- **Tax ID Number:** The customer's ID number for taxation purposes, if applicable.

7. (Optional) On the **Additional** tab, enter any additional information that your store collects about customers. These fields are customizable and the information collected may vary by store.

8. (Optional) If the store will use an alias for the customer, click the **Alias** tab and enter an alias.

Editing customers

> **Pre-requisites:** You must have the **Allowed to view and edit all customers** permission to edit customers in POS.

1. Look up the customer. Refer to [Looking up customers](#) for more information.

2. Tap **Customers** | **Edit Customer**.

3. Edit the customer as required.

4. Tap **Save**.

Adding a shipping address

1. Do one of the following:

   - Add a new customer (**Customers** | **New Customer** and tap the **Shipping** tab).

   - Edit an exiting customer (**Customers** | **Edit Customer** and tap the **Shipping** tab).

   - Look up a customer and select their shipping address (**Customers** | **Select Shipping Address**).

2.   Tap **New**.

3.   Enter the address.

4.   (Optional) If the customer wants the address to be their primary shipping address, select **This is the primary shipping address for this customer**.

5.   Tap **Save**.

6.   Tap **OK**.

 Selecting a shipping (or delivery) address

If a customer wants their purchase shipped (or delivered), you can select an existing shipping address or enter a new shipping address.

1.   Look up the customer. Refer to Looking up customers for more information.

2.   Enter all of the items in the transaction.

3.   Tap **Customers** | **Select Shipping Address**.

4.   On the **Select Shipping Address** screen, select an address from the list of existing addresses.

     Most customers will want to ship to their **primary** shipping address. However, sometimes customers will want to ship to another address.
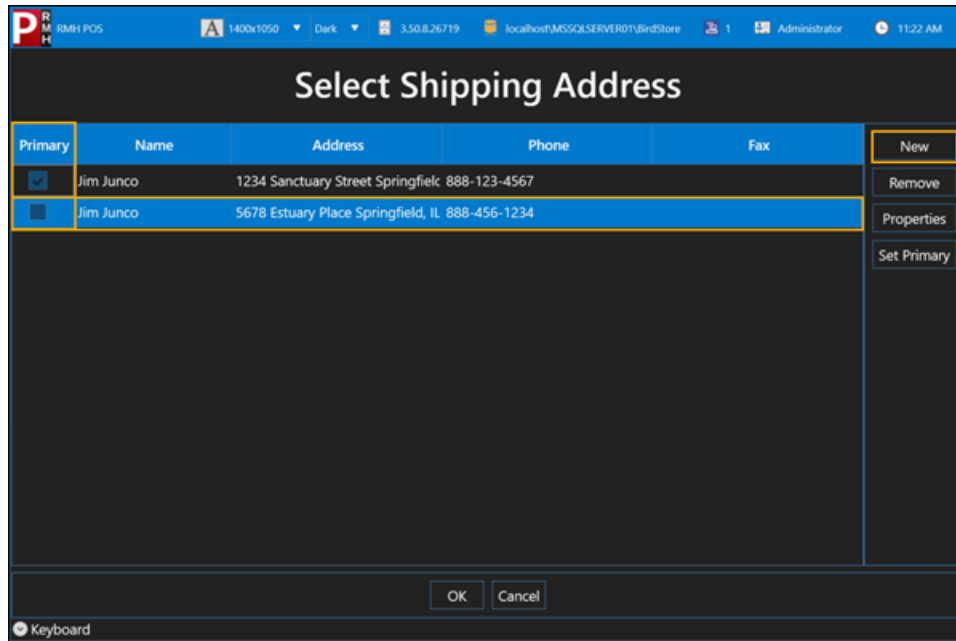
5. (Optional) If the customer wants to ship to a new address, tap New and enter the new address. Refer to Adding a shipping address for more information.

6. (Optional) If the customer wants to change the primary shipping address to a different address, tap the address to select it and tap **Set Primary**.

7. Tap **OK**.

Looking up a customer's purchase history

Sometimes you will need to look up a customer's purchase history. For example, a customer may ask you to look up a product they purchased in the past so they can purchase it again, or they may ask you when they bought a product to see if it is still under warranty.

1. Look up the customer. Refer to Looking up customers for more information.

2. Tap **Customers** | **Display History**.

3. Review the customer's purchases, as required.

A summary of the customer's purchase history displays at the top of the screen. It shows the date of the customer's last purchase, the total number of visits (where they made a purchase), the total of all purchases made at the store, any savings from sales or discounts, and any vouchers they have redeemed.

You can click on the heading of any column to sort the purchases by the column. For example, you can sort purchases by newest to oldest or oldest to newest, by transaction number, or by item lookup code (ILC) or description.

Working with vouchers

Selling vouchers

Vouchers can include **gift certificates** and **gift cards**. Gift certificates are typically printed on paper or card stock. Gift cards are typically plastic cards that have a bar code or magnetic stripe. Customers purchase vouchers as a form of prepayment for items or services. Customers typically purchase vouchers as gifts and give them to other people to use.

1. Do one of the following:

- Scan the voucher.

- Enter the voucher item lookup code (ILC) into the lookup field.

2. If the voucher has a serial number, do one of the following:

- Enter the serial number into the **serial number lookup field** and press **Enter**.

- Scroll through the list of serial numbers and tap the correct one to select it.
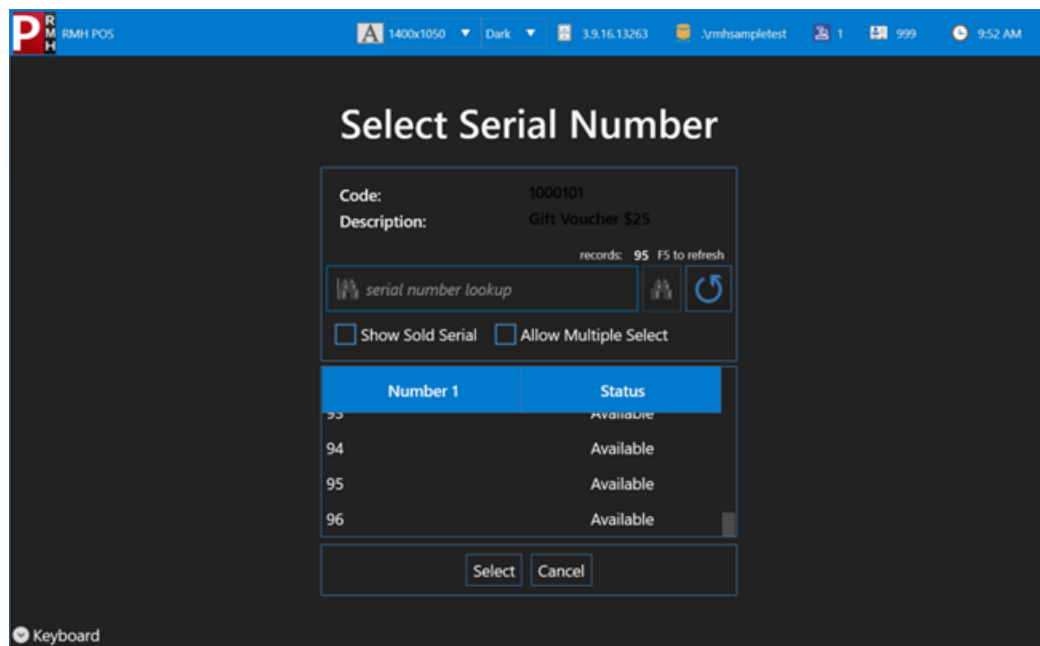
3. Tap **Select**. The voucher is listed as an item on the POS transaction screen.
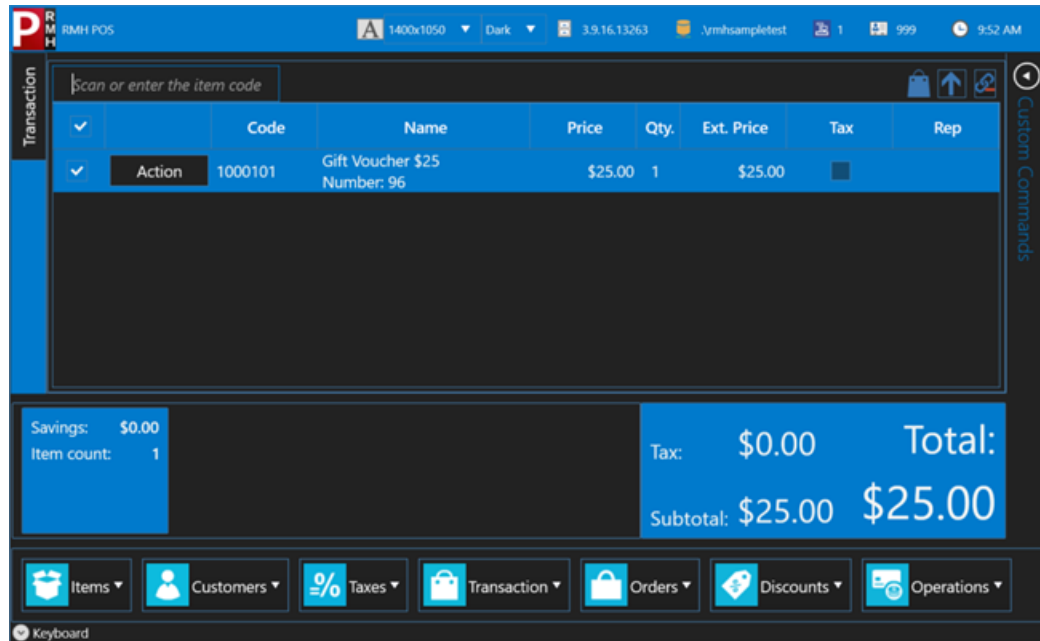
> **Note:** If your store sells vouchers for predefined amounts, e.g., $10, $25, $50, that amount displays in the Price column.

4. If prompted, enter the voucher amount.

5. Add other items to the transaction as required.

6. Tap **Transaction | Tender Sale** or press **F12**.

7. On the **Tender** screen, enter the tender amount next to the relevant tender type.

8. Tap **OK**.

9. Tap **Yes** to print the receipt.

10. Tap **Yes** or **No** when prompted to print a gift receipt.

```
              RMH Sample
          7727 Lake Underhill Road
            Orlando FL 32899
              (407) 303-8110
              (407) 303-8110

            Sales Receipt

Transaction #:        4336
Date:  2021-11-18     Time:  9:53 AM
Cashier:  999         Register #:  1

Item       Description              Amount
========  ======================  =============
1000101    Gift Voucher $25          $25.00
           Number: 96
           New Balance :$25.00
                                  =============
                        Sub Total    $25.00
                         EXEMPT        $0.00
                           Total     $25.00

                    Cash Tendered    $25.00
                      Change Due       $0.00


              4336
          Thank you for shopping
          RMH Sample
          We hope you'll come back soon!
```

Checking a voucher balance

1. Tap **Transaction | Check Voucher Balance**.

2. Tap in the **Number** field and enter the voucher number.

3. Tap the **Search** icon or press **Enter**. The current balance of the voucher displays.
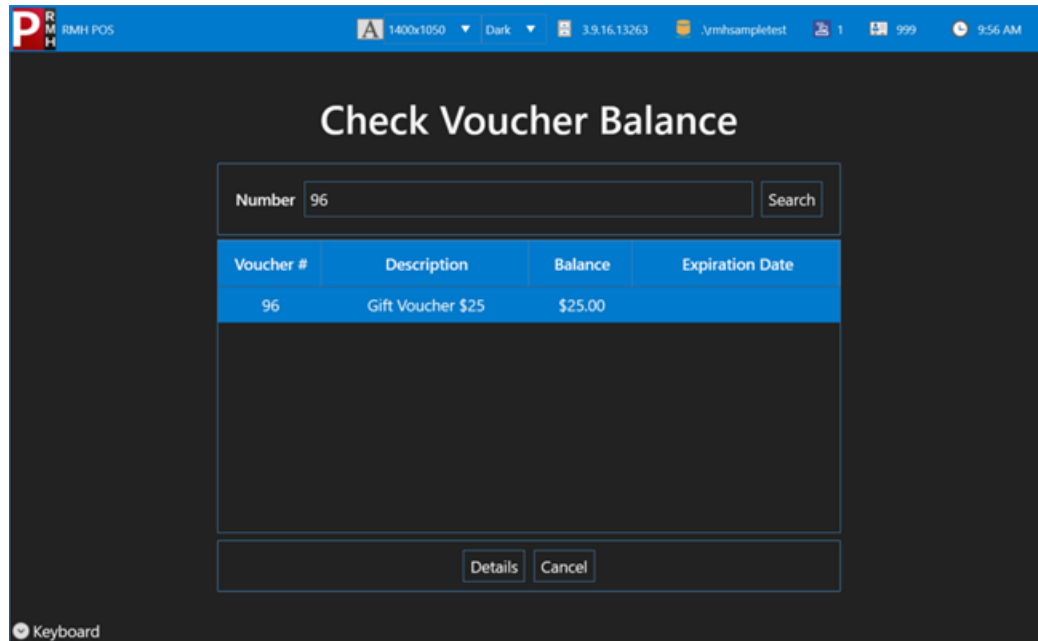
4. (Optional) Tap **Details** to see the date the voucher was purchased and the trans-
    action number.

    > **Tip:** If the customer has used the voucher to purchase other items in the
    > past, tap the **Details** button to view the purchase history.

Tendering a sale using a voucher

1. Enter all of the items in the transaction.

2. Tap **Transaction | Tender Sale** or press **F12** or **Enter**.

3. On the **Tender** screen, enter the amount the customer wants to redeem from the
    voucher next to the **Voucher** tender type.

    The customer can redeem a portion of the voucher balance or the full voucher bal-
    ance. The name of the **Voucher** tender type is customizable and may vary by
    store. Your store may call it Gift Voucher, Gift Card, Gift Certificate, or something
    else. In the example below, it's called Gift Voucher.

4.	Tap **OK**.

5.	If your store sells more than one type of voucher, on the **Select Voucher Item** screen tap the type of voucher the customer is presenting and tap **Select**.

6. On the **Voucher Verification** screen, tap in the **Number** field and enter the voucher number.

7. Tap **Search** or press **Enter**.

8. Tap **Select**.

9. Tap **Yes** to print the receipt.

   The receipt shows the voucher number, previous balance, and new balance.

```
              RMH Sample
          7727 Lake Underhill Road
            Orlando FL 32899
             (407) 303-8110
             (407) 303-8110

             Sales Receipt

Transaction #:        4337
Date:  2021-11-18    Time:  12:44 PM
Cashier:  999        Register #:  1

Item      Description              Amount
========  =====================  ============
WB        Water Mark Bottle        $15.95
          1LT
                               ============
                 Sub Total        $15.95
                      VAT          $3.04
                      Total       $18.99
          Gift Voucher Tendered   $18.99
                  Number:96
               Previous Balance   $25.00
                  New Balance      $6.01

                  Change Due       $0.00
```

4337
Thank you for shopping
RMH Sample
We hope you'll come back soon!

Reloading gift cards

Note: You can only reload (add money to) a gift card (voucher) that has been already sold.

1. Do one of the following:

   - Scan the gift card.

   - Enter the item lookup code (ILC) into the lookup field.

2. On the **Select Serial Number** screen, tap **Show Sold Serial** to select it.

3. Do one of the following:

- Enter the serial number into the **serial number lookup field** and press **Enter**.

- Scroll through the list of serial numbers and tap the correct one to select it.
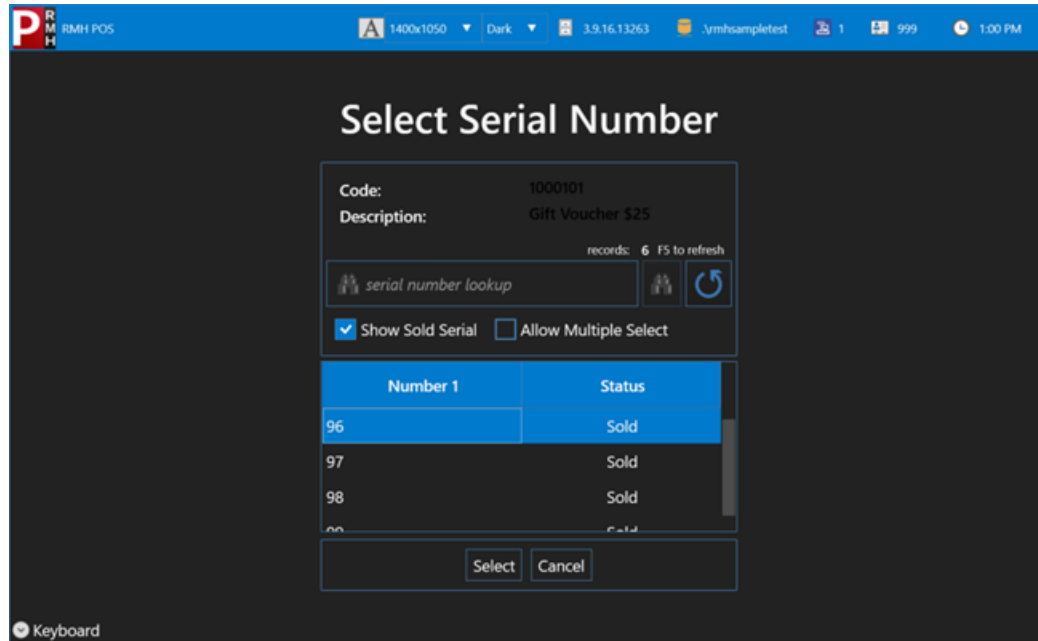
4. Tap **Select**.

5. Tap **Yes** to confirm you want to add money to the gift card.
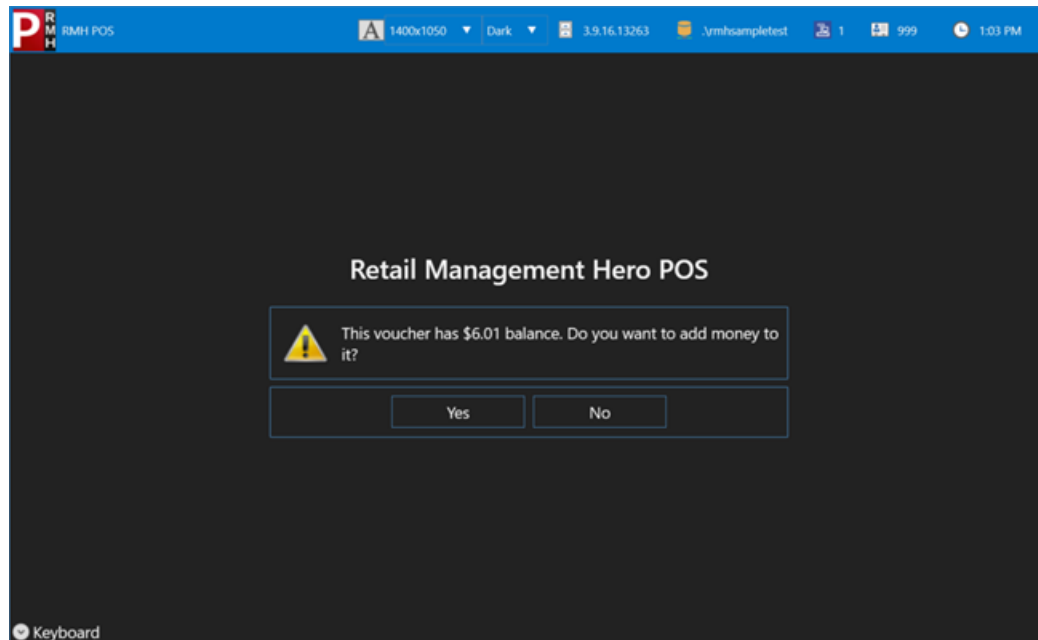
6. On the **Enter Price** screen, enter the amount of money you want to add to the gift card.
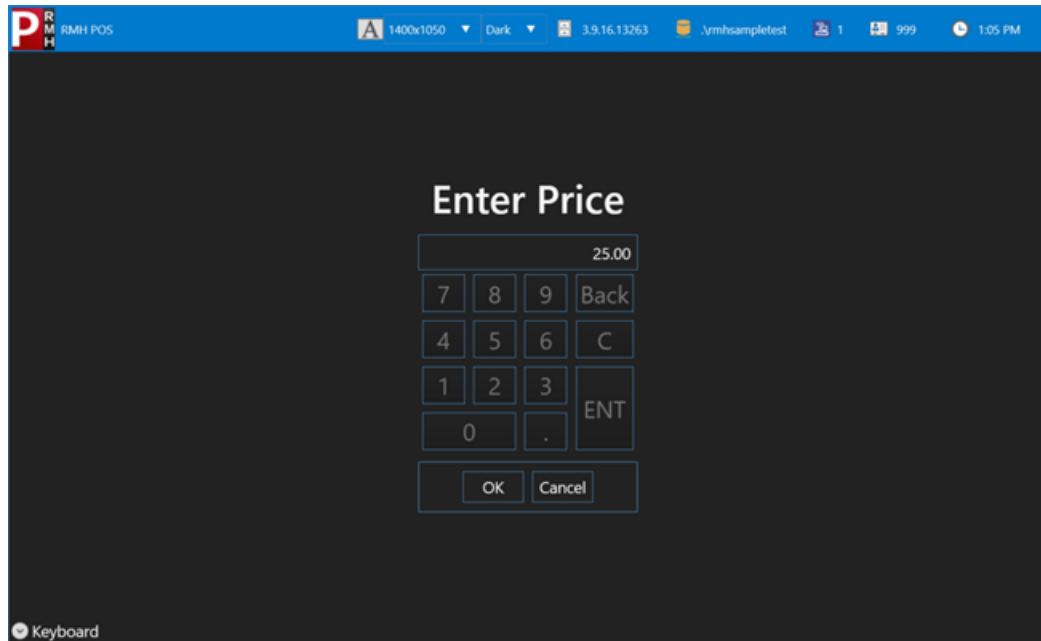
7. Tap **OK**.

8. Add other items to the transaction, as required.

9. Tap **Transaction | Tender Sale** or press **F12**.

10. On the **Tender** screen, enter the tender amount next to the relevant tender type.

11. Tap **OK**.

12. Tap **Yes** to print the receipt.

The receipt shows the new balance:

Processing refunds to a voucher

Some stores have a policy of refunding to a voucher when a customer returns an item. You can refund to a new voucher or to an existing voucher.

1. Process the return up to the point of tendering the sale.

2. Enter the refund amount next to the **Voucher** tender type.

   You can enter the full refund amount in the **Voucher** tender type or a portion of the refund amount. Follow your store's policies and procedures for refunds. The name of the **Voucher** tender type is customizable and may vary by store. Your store may call it Gift Voucher, Gift Card, Gift Certificate, or something else. In the example below, it's called Gift Voucher.

3. Tap **OK**.

4. If your store sells more than one type of voucher, on the **Select Voucher Item** screen tap the type of voucher and tap **Select**.

5. On the **Voucher Refund Verification** screen, do one of the following:

- Tap **Create new** to load the refund amount on a new voucher.

- Tap **Refund to existing** to load the refund amount on an existing voucher.

6. If you are refunding to a new voucher, if prompted, enter the voucher number

7. If you are refunding to an existing voucher, tap in the **Existing Number** field and enter the voucher number.

8. Tap **Search** or press **Enter**.

9. Tap **Select**.

10. Tap **Yes** to print the receipt.

   The receipt shows the new balance.

Working with discounts

About discounts

You can add discounts to an entire transaction or to specific items in a transaction. There are several different types of discounts available in POS.

Transaction discounts

Transaction discounts apply to all items in the transaction, including items added after the discount is selected. These discounts are available in POS when you tap **Discounts | Transaction Discount**.

Name	Description	Example
Discount from Minimum Price	Applies a percentage (%) discount to the minimum price. The item's minimum price is defined in the Lower Bound field in Store Manager. If the Lower Bound is not defined for an item, the discount is applied to the retail price.	The store sells bulk pet food. Bird seed is normally $1.25 per pound and the minimum price is $1.15. A manager agrees to offer a discount of 5% off the minimum price to a customer who agrees to buy 100 pounds of seed.
Discount from Retail Price	Applies a percentage (%) discount to the retail price. The item's retail price is defined in the Price field in Store Manager. This is the price before any sales or discounts are applied.	The store sells patio furniture and other outdoor items. The store has a policy that salespeople can offer up to 10% off retail price to customers if they agree to buy over $500 in furniture.
Markup from	Sets the percentage (%)	The store sells vehicle parts.

Name	Description	Example
Cost	markup from cost. The item's cost is defined in the Cost field in Store Manager.	The store has negotiated a contract with the local municipal government to sell them parts at 20% markup from cost for repairs to their vehicle fleet.
Set Profit Margin	Sets the percentage (%) profit margin. The item's profit margin is defined in the Profit Margin field in Store Manager.	The store sells electronics. A customer wants to purchase over $5,000 in items. The manager agrees to reduce the profit margin from 50% to 30% to clear the items from inventory.

Price level discounts

Price level discounts apply to all items in the transaction, including items added after the discount is selected. These discounts are available in POS when you tap **Discounts | Transaction PriceLevel**. If the price level is not defined for item(s) in Store Manager, the discount is not applied.

Name	Description	Example
Price Level A	Applies Price Level A, if defined in Store Manager.	The store sells building materials. The store has a policy to offer Price Level A (their best price) to construction companies that purchase over $500 in items using their com-

Name	Description	Example
		pany credit card.
Price Level B	Applies Price Level B, if defined in Store Manager.	The store sells building materials. The store has a policy to offer Price Level B (their second best price) to anyone that purchases over $300 in items.
Price Level C	Applies Price Level C, if defined in Store Manager.	The store sells building materials. The store has a policy to offer Price Level C (their third best price) to anyone that purchases over $200 in items.

Current item discounts

Current item discounts apply to the selected item only. The following discounts are available in POS when you tap **Discounts** | **Current Item Discount**.

Name	Description	Example
% from Current Price	Applies a percentage (%) discount to the current price. The item's current price is the retail price minus any existing sales or discounts.	The store sells kids clothing. To make room for new "back to school" stock, the store is offering an additional 10% off any red-tagged items.
% from Retail	Applies a percentage (%) dis-	The store sells electronics. The

Name	Description	Example
Price	count to the retail price. The item's retail price is defined in the Price field in Store Manager. This is the price before any sales or discounts are applied.	store is having a Black Friday sale and offering 15% off selected items.
Markup from Cost	Sets the percentage (%) markup from cost. The item's cost is defined in the Cost field in Store Manager.	The store sells gravel and mulch. The store has negotiated a contract with the local municipal government to sell them gravel and mulch at 20% markup from cost for park maintenance.
Set Profit Margin	Sets the percentage (%) profit margin. The item's profit margin is defined in the Profit Margin field in Store Manager.	The store sells electronics. A customer wants to purchase an older model computer. The manager agrees to reduce the profit margin from 50% to 30% to clear the item from inventory.
$ from Current Price	Applies a dollar ($) discount to the current price. The item's current price is the retail price minus any existing sales or discounts.	The store sells kids clothing. To make room for new "back to school" stock, the store is offering an additional $10 off any red-tagged items.

All items discounts

These discounts are applied to all items in the transaction at the time the discount is selected, but not to items added after the discount is selected. These discounts are available in POS when you tap **Discounts** | **All items**.

Name	Description	Example
% from Current Price	Applies a percentage (%) discount to the current price.	The store sells kids clothing. To make room for new "back to school" stock, the store is offering an additional 10% off all items.
$ from Current Price	Applies a dollar ($) discount to the current price.	The store sells kids clothing. To make room for new "back to school" stock, the store is offering an additional $10 off all items.
Set Subtotal Amount	Sets the transaction subtotal amount ($) by proportionally discounting all of the items currently in the transaction.	The store sells patio furniture and other outdoor items. A customer has picked out a BBQ, patio furniture, and gazebo but is hesitating about spending over $8,000. The manager offers to sell all of the items to the customer for $7,000 before tax.

Adding discounts

You can add discounts to entire transactions or to specific items in a transaction. Refer to About discounts for more information about specific types of discounts. Follow your store's policies for adding discounts.

> **Pre-requisites:** You must have the **Allowed to access Pricing** permission to add discounts in POS. You may only have permission to add discounts up to a maximum percentage or maximum dollar amount.

To add a discount to the entire transaction:

1. Enter all of the items in the transaction.

2. Do one of the following:

   - Tap **Discounts** | **Transaction Discount** and select a percent discount.
   - Tap **Discounts** | **Transaction PriceLevel** and select a price level discount.
   - Tap **Discounts** | **All Items** and select a discount option.

3. If prompted, tap the appropriate discount reason code to select it and tap **OK**.

4. Tender the sale.

To add a discount to a specific item:

1. Enter the item in the transaction.

2. Tap the item to select it.

3. Do one of the following:

   - Tap **Action**, tap **Discount**, enter the percent discount, and tap **OK**.
   - Tap **Discounts** | **Current Item Discount** and select a discount option.

4. If prompted, tap the appropriate discount reason code to select it and tap **OK**.

5. Tender the sale.

Working with quotes and work orders

Looking up items

The easiest way to look up items is to scan them, However, if scanning doesn't work, there are other ways to look up items in POS.

Entering the item lookup code

Every item has a unique **item lookup code (ILC)**. It is usually printed on the price tag or shelf tag. If you have the ILC, type it into the **lookup field** and press **Enter** to see matching items.
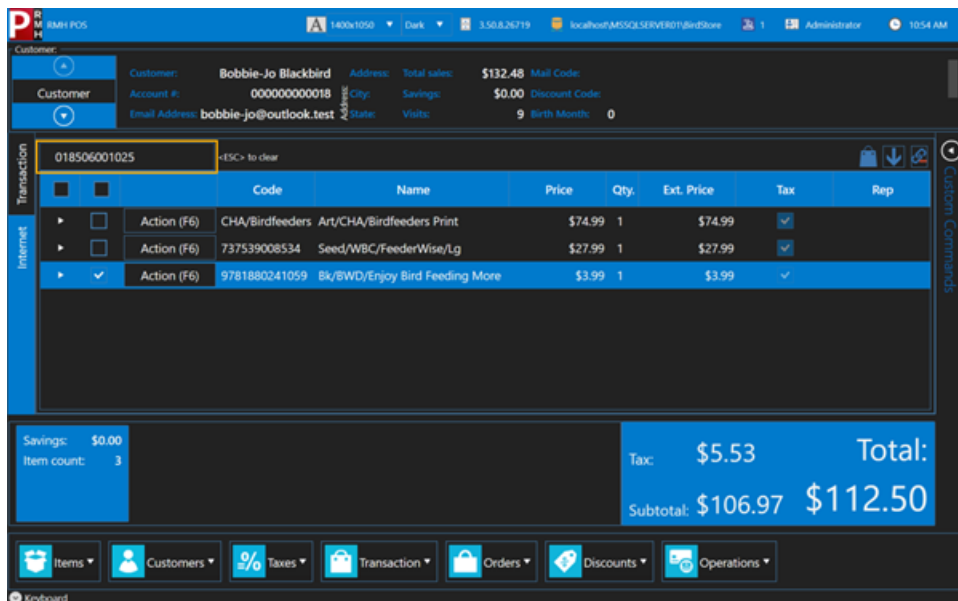
Entering an item name or alias

If you don't have the ILC, or the ILC you have doesn't work, tap **Items** | **Lookup Item** or press **F2** to display the **Item Lookup** screen. From this screen you can try looking up

the item by **item name** or **alias**. An alias is a unique nickname for an item. Aliases are optional and may not be defined for every item.
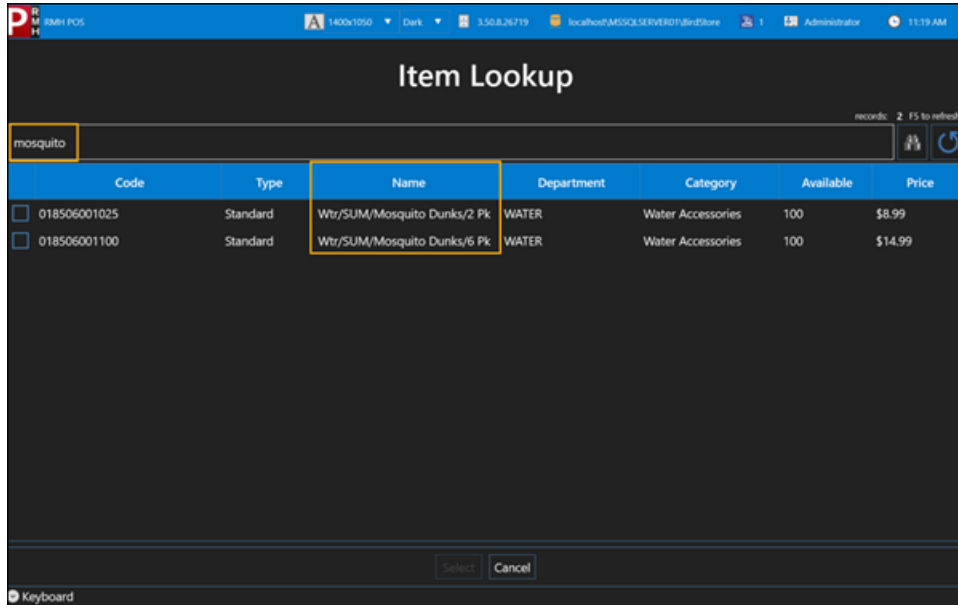
Entering a department or category name

If you don't have the ILC, and weren't able to look up the item by item name or alias, you can also try looking up the item by **department** or **category** name.
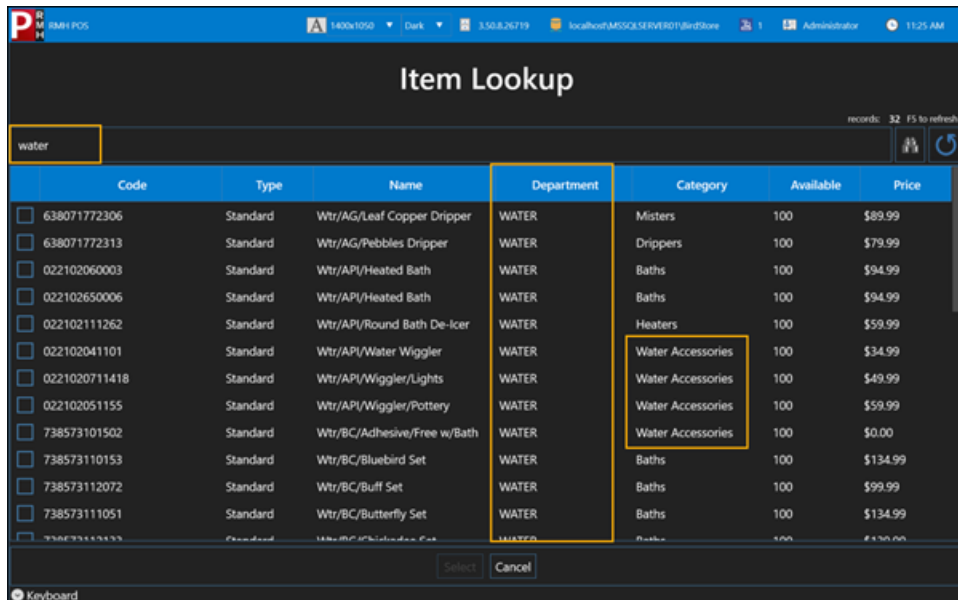
Entering a combination of item name, alias, description, and category

If the item lookup produces too many results and you don't have time to scroll through all of the results to find the item, try narrowing the results by entering a combination of item name, alias, description, and category.

Entering a partial item name, alias, description, or category

You don't have to type the full item name, alias, description, or category into the lookup field. You can save time by entering just part of the word.
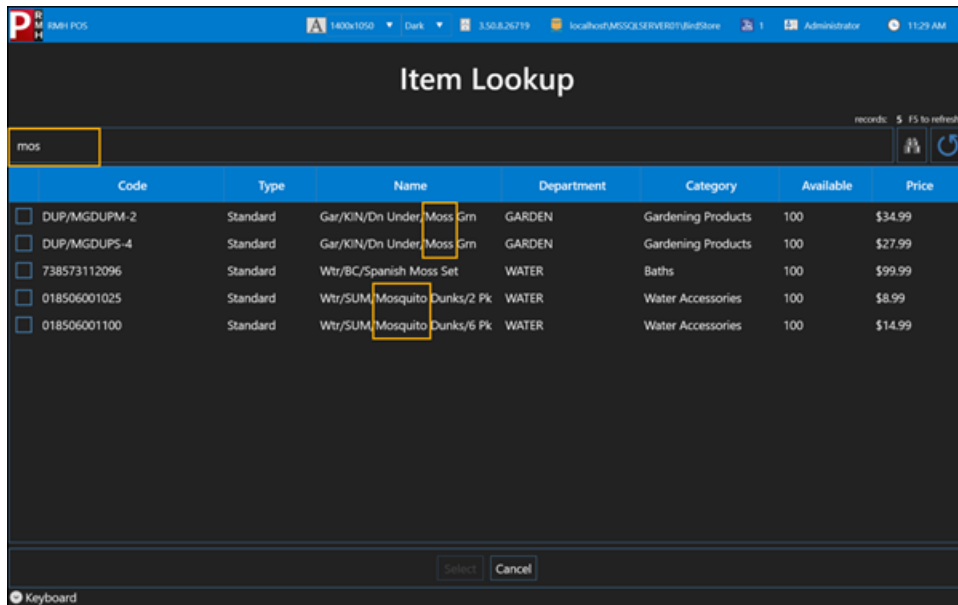
About quotes

Generally, quotes are created if customers are researching costs for a purchase, or if they are comparing the costs of purchasing the same or similar items at different stores (comparison shopping).

Quotes may include discounts or price changes that the customer has negotiated with a salesperson or manager. Depending on the store's policies, quotes may only be valid

for a limited period of time, such as 30 days. After this period, the store is no longer obligated to sell the items to the customer at the prices identified in the quote.

For quotes, you enter all of the items in the quote, but you don't collect any payment when you tender the sale. The customer has the option to return to the store at a later date to complete the transaction. They may also choose not to complete the transaction.

If some items from the quote are available immediately, customers have the option to pick up those items and return at a later time to pick up the remaining items. However, customers must pay the total amount for all items they pick up. Quote can also be converted to work orders if store employees require additional time to assemble the order for the customer.

Creating quotes

Depending on your store's policies, you may be required to select a customer to create a quote. Selecting the customer when you create the quote makes it easier to look up the quote later when the customer returns to the store to complete the transaction.

1. Tap **Orders** | **Quote**.

    You will know that POS is in quote mode if you see the quote icon in the top right corner of the screen.
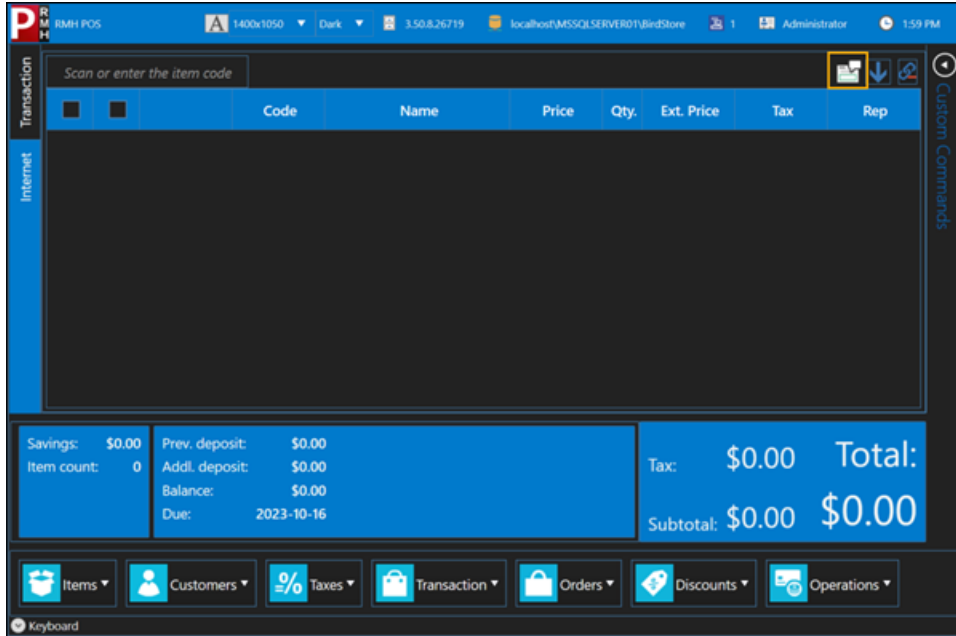
2. (Optional) Tap **Customers** | **Lookup Customer** or press **F7**.

3. (Optional) To select the customer, do one of the following:

   ▪ Tap the customer's name once and tap **Select**.

   ▪ Tap the customer's name twice.

   The customer's information displays in the **Customer** pane at the top of the POS screen.

4. Enter all of the items in the quote.

5. (Optional) Enter approved discounts or price changes.
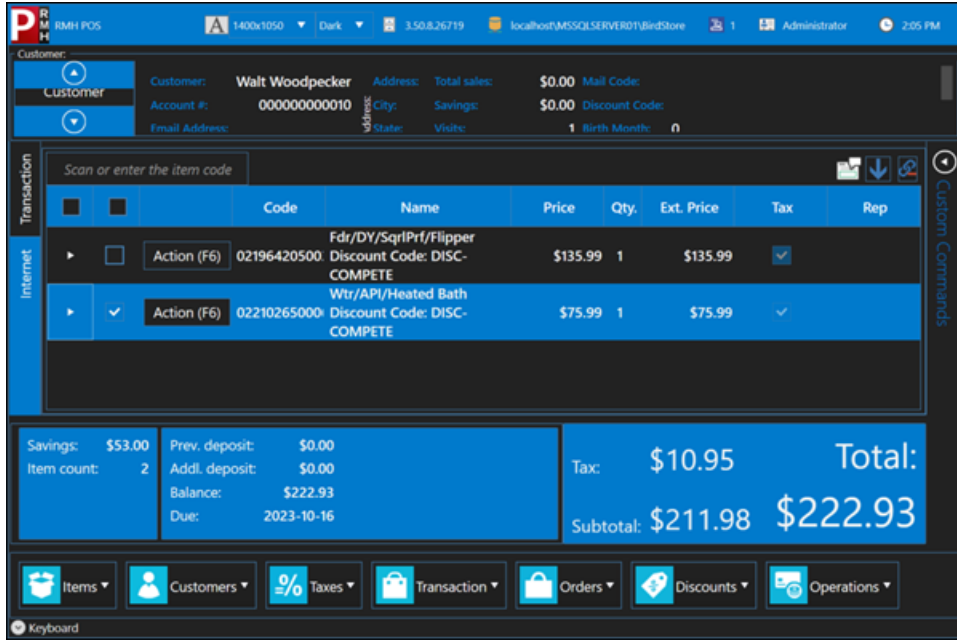
6.	Tap **Transaction | Tender Sale** or press **F12**.

	On the **Tender** screen, the **Total Due** is $0.00 because you are creating a quote and no money is collected when you tender the sale.
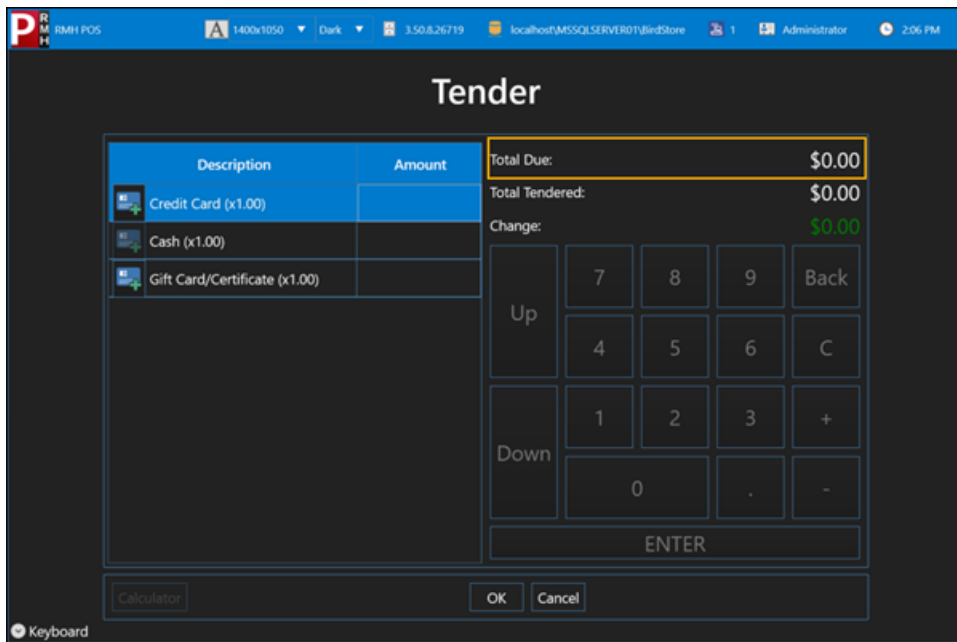
7.	Tap **OK**.

8. Tap **Yes** to print the receipt.

    The receipt shows the total quote amount including tax, as well as any approved discounts or price changes.

```
              Demo Store - Bird
             12446 Bethesda Ave1
              Bethesda MD 20812
                301-555-1212

                   Quote

Quote #:            11
Account #:          000000000010
Date:  2023-10-16   Time:  2:07 PM
Cashier:  1         Register #:  1

Item      Description            Amount
=======   ==================   ============
0219642050 Fdr/DY/SqrlPrf/Flipper    $169.99
           Discount Code: DISC-
           COMPETE
           Discount                   -$34.00
0221026500 Wtr/API/Heated Bath        $94.99
           Discount Code: DISC-
           COMPETE
           Discount                   -$19.00
                                ============
                    Sub Total       $211.98
         Hawaii General Sales Tax      $8.83
               Maui Local Tax          $2.12
                        Total       $222.93

             Deposit Payment          $0.00
             Total Purchased          $0.00
                   Total Due          $0.00

                  Change Due          $0.00

           Remaining Deposit          $0.00
                 New Balance        $222.93

          You saved $53.00!

          ||||| ||| ||| ||||| ||||
                   11
         Thank you for shopping
            Demo Store - Bird
       We hope you'll come back soon!
```

Processing quotes

If you look up the customer, when you recall the quote, POS only displays quotes belonging to the selected customer. If you do not look up the customer, when you recall the quote, POS displays all open quotes and you will have to search for the customer's quote.

1.   (Optional) Tap **Customers** | **Lookup Customer** or press **F7**.

2.   (Optional) To select the customer, do one of the following:

   ▪   Tap the customer's name once and tap **Select**.

   ▪   Tap the customer's name twice.

   The customer's information displays in the **Customer** pane at the top of the POS screen.

3.   Tap **Orders** | **Recalls** | **Recall a Quote**.

4.   To select the customer's quote, do one of the following:

   ▪   Tap the quote once and tap **Add**.

   ▪   Tap the quote twice.

5.   Tap **Transaction** | **Tender Sale** or press **F12**.

6.   From the **Select Order Action** screen, tap one of the following:

   ▪   Pick up Entire

   ▪   Convert to Work Order
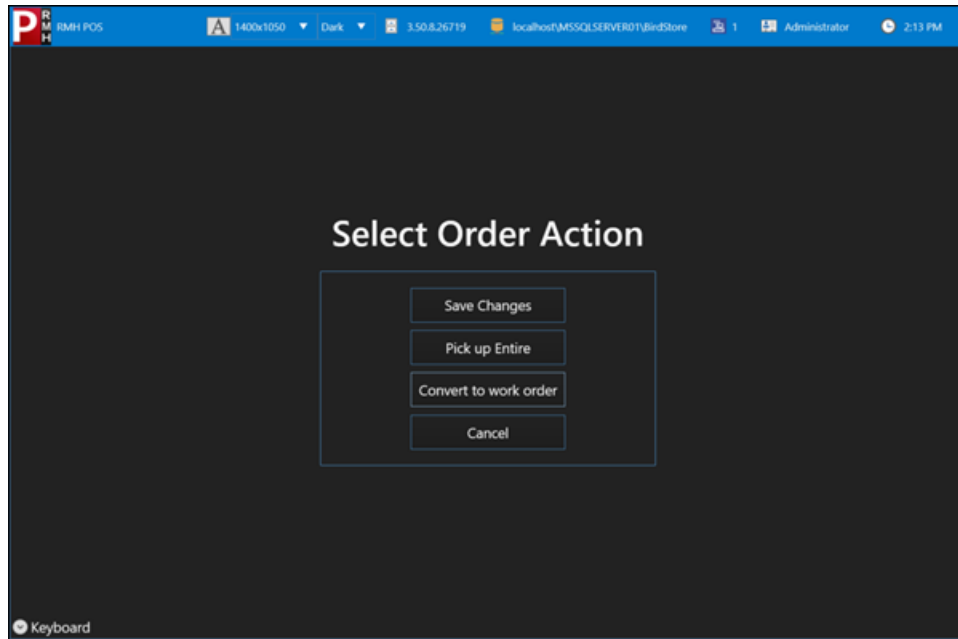
7. Enter the amount next to the appropriate tender type.

8. Tap **OK**.

9. Tap **Yes** to print the receipt.

About work orders

Generally, work orders are created if store employees require additional time to assemble the order for the customer or to pull items from inventory. For example, large items may need to be collected from a nearby warehouse and brought to the store for pick up.

Depending on your store's policies, customers may be required pay a deposit on work orders. If the customer pays a deposit, when they return to pick up the work order you will need to collect the balance owing.
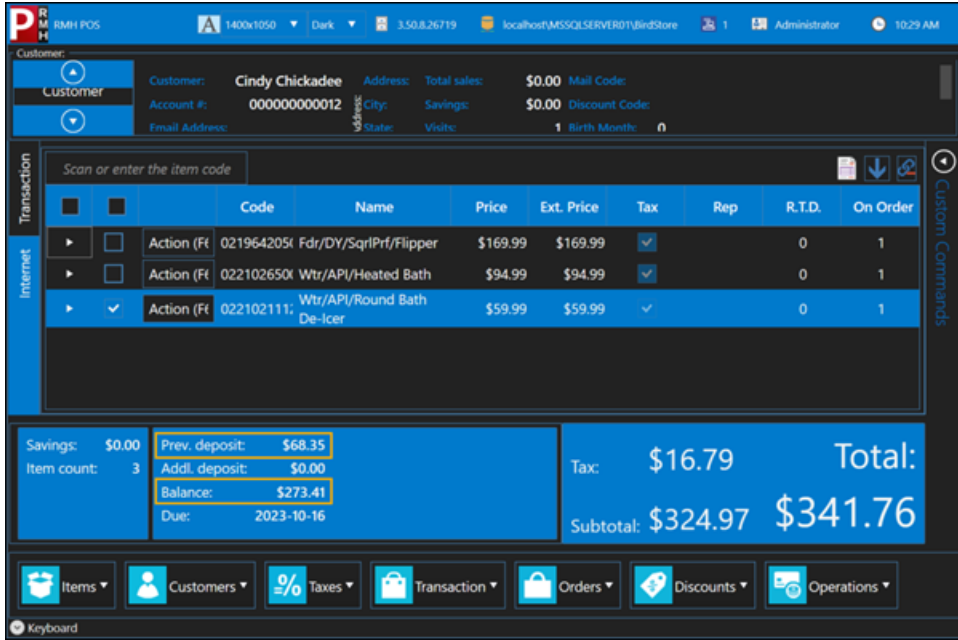
If some items in the work order are available immediately, customers have the option to pick up those items and return at a later time to pick up the remaining items. However, customers must pay the total amount for all items they pick up. If the customer previously paid a deposit, POS calculates how much of the deposit applies to the items the customer is picking up, and the amount due is the total amount minus the applicable deposit.
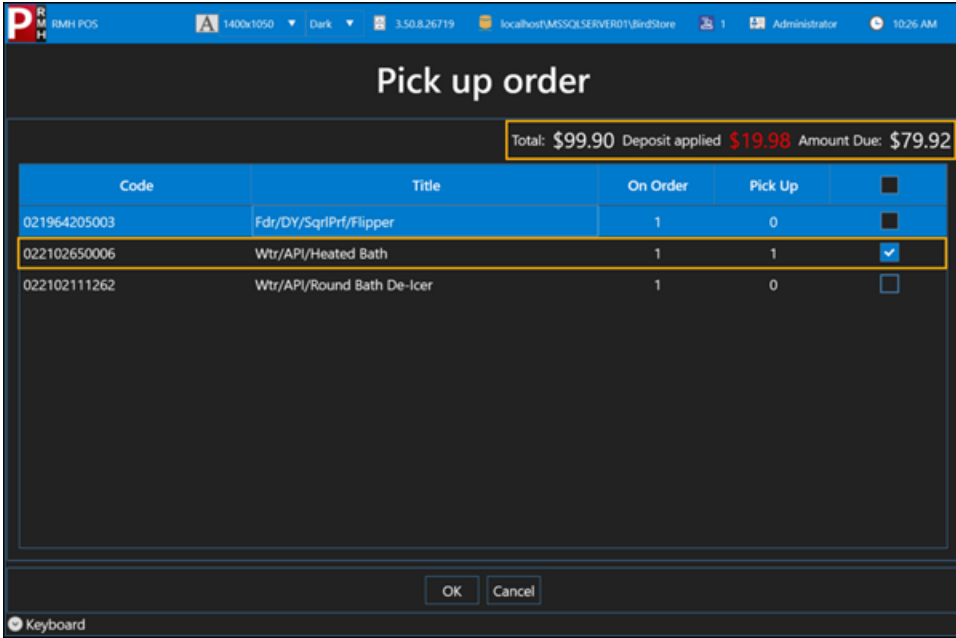
If the customer has already picked up part of the order, you will see the quantity picked up in the **R.T.D.** (received to date) column. You will see the quantity remaining to be picked up in the **On Order** column. The **Balance** owing is the total amount of the work order minus any deposits or amounts paid previously.
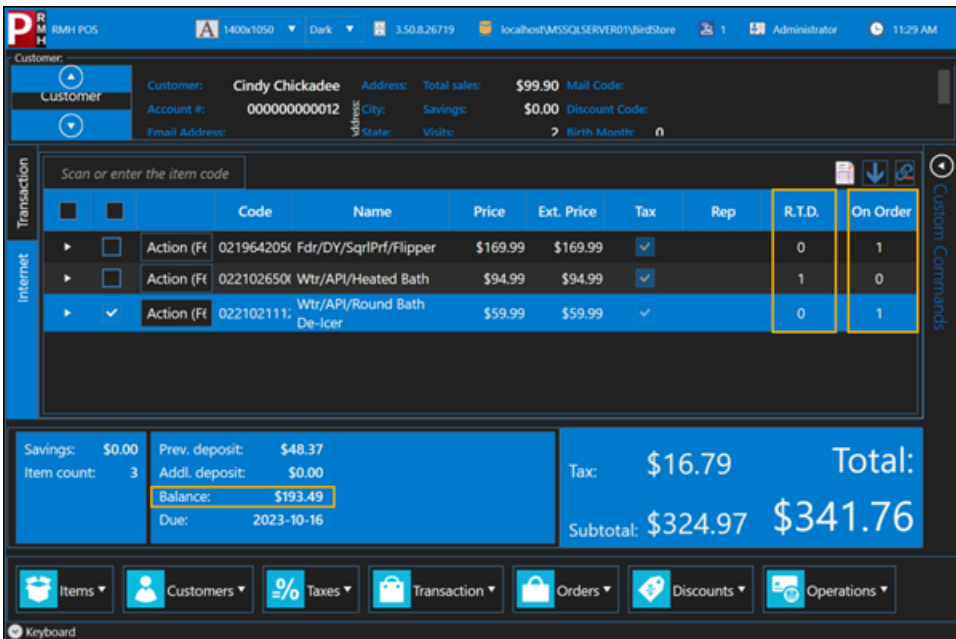
Creating work orders

Depending on your store's policies, you may be required to select a customer to create a work order. Selecting the customer when you create the work order makes it easier to look up the work order later when the customer returns to the store to pick up their order and pay the balance owing.

1.   Tap **Orders | Work Order**.

     You will know that POS is in work order mode if you see the work order icon in the top right corner of the screen.
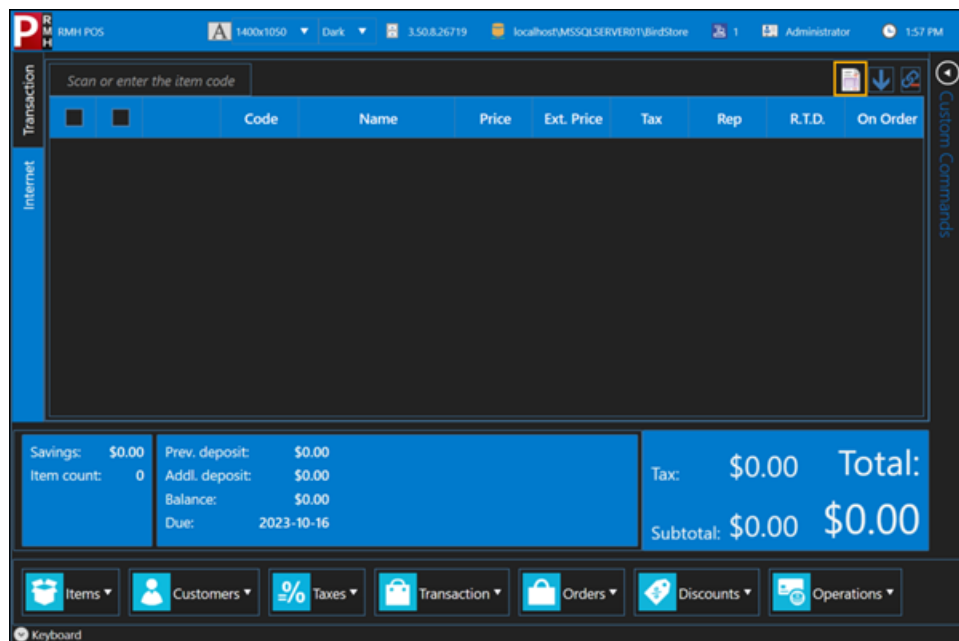
2.   (Optional) Tap **Customers | Lookup Customer** or press **F7**.

3.   (Optional) To select the customer, do one of the following:

     ▪ Tap the customer's name once and tap **Select**.

     ▪ Tap the customer's name twice.

The customer's information displays in the **Customer** pane at the top of the POS screen.

4. Enter all of the items in the work order.

    If your store requires customers to pay a deposit on work orders, the **Addl. deposit** field indicates the **required deposit amount**.
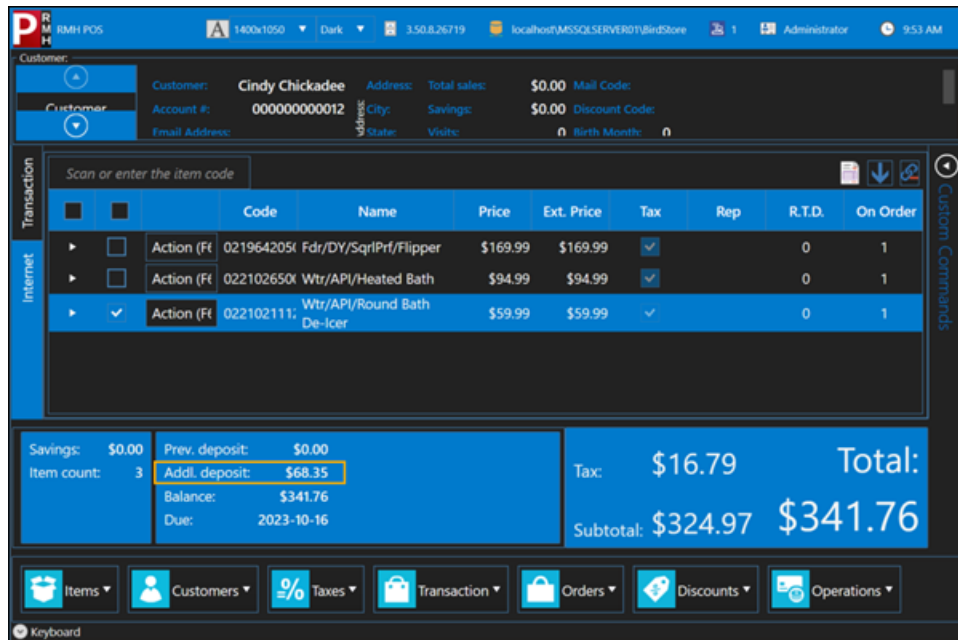
5. Tap **Transaction | Tender Sale** or press **F12**.

6. Enter the amount next to the appropriate tender type.

7. Tap **OK**.

8. Tap **Yes** to print the receipt.

    The receipt shows the total work order amount including tax, the deposit amount, and the balance owing on the work order.

```
                Demo Store - Bird
               12446 Bethesda Ave1
                Bethesda MD 20812
                  301-555-1212
┌─────────────────────────────────────────┐
│              Work Order                   │
└─────────────────────────────────────────┘
Work Order #:          10
Account #:             000000000012
Date:   2023-10-16     Time:  9:54 AM
Cashier:   1           Register #:   1

Item      Description                    Amount
========  =======================  ==============
021964205( Fdr/DY/SqrlPrf/Flipper         $169.99
           RTD:                                 0
           On Order:                            1
           Picked up:                           0

022102650( Wtr/API/Heated Bath             $94.99
           RTD:                                 0
           On Order:                            1
           Picked up:                           0

0221021112 Wtr/API/Round Bath De-Icer      $59.99
           RTD:                                 0
           On Order:                            1
           Picked up:                           0

                      Sub Total        $324.97
    Hawaii General Sales Tax            $13.54
           Maui Local Tax                $3.25
                          Total        $341.76

              Deposit Payment           $68.35
               Total Purchased           $0.00
                     Total Due          $68.35

          Credit Card Tendered          $68.35
                    Change Due           $0.00

             Remaining Deposit          $68.35
                   New Balance         $273.41

           ║║║║║║║║║║║║║║║║║║║
                     10
          Thank you for shopping
            Demo Store - Bird
       We hope you'll come back soon!
```

Processing work orders

If you look up the customer, when you recall the work order, POS only displays work orders belonging to the selected customer. If you do not look up the customer, when you recall the work order, POS displays all open work orders and you will have to search for the customer's work order.

1.   (Optional) Tap **Customers | Lookup Customer** or press **F7**.

2.   (Optional) To select the customer, do one of the following:

- Tap the customer's name once and tap **Select**.

- Tap the customer's name twice.

The customer's information displays in the **Customer** pane at the top of the POS screen.

3. Tap **Orders** | **Recalls** | **Recall a Work Order**.

4. To select the customer's work order, do one of the following:

- Tap the work order once and tap **Add**.

- Tap the work order twice.

5. Tap **Transaction** | **Tender Sale** or press **F12**.

6. From the **Select Order Action** screen, tap one of the following:

- Pick up Entire
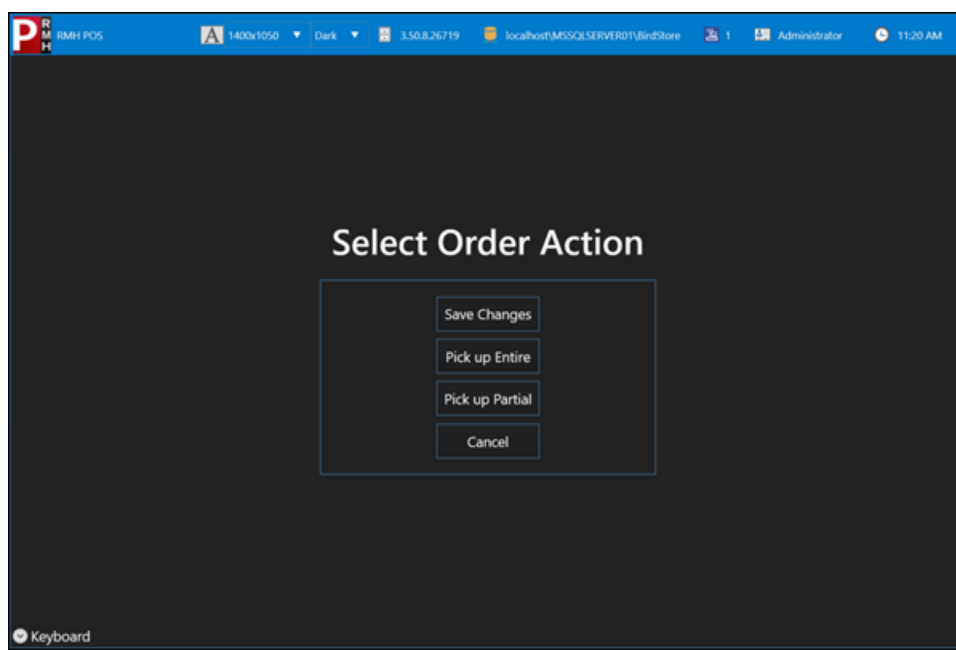
- Pick up Partial

7. If the customer is picking up part of their order:

    a. Tap the items the customer is picking up to select them.
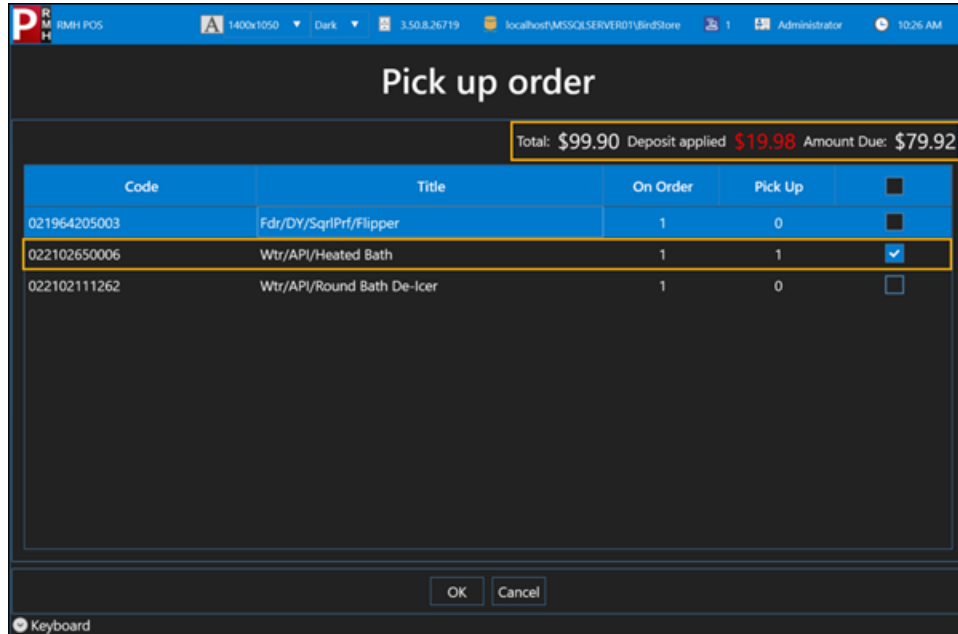
    b. (Optional) In the **Pick Up** column, enter the quantity of the item the customer is picking up.

    c. Tap **OK**.

    d. If the customer paid a deposit on the work order, tap **OK** to confirm the amount of the deposit that is being applied to the pick up.
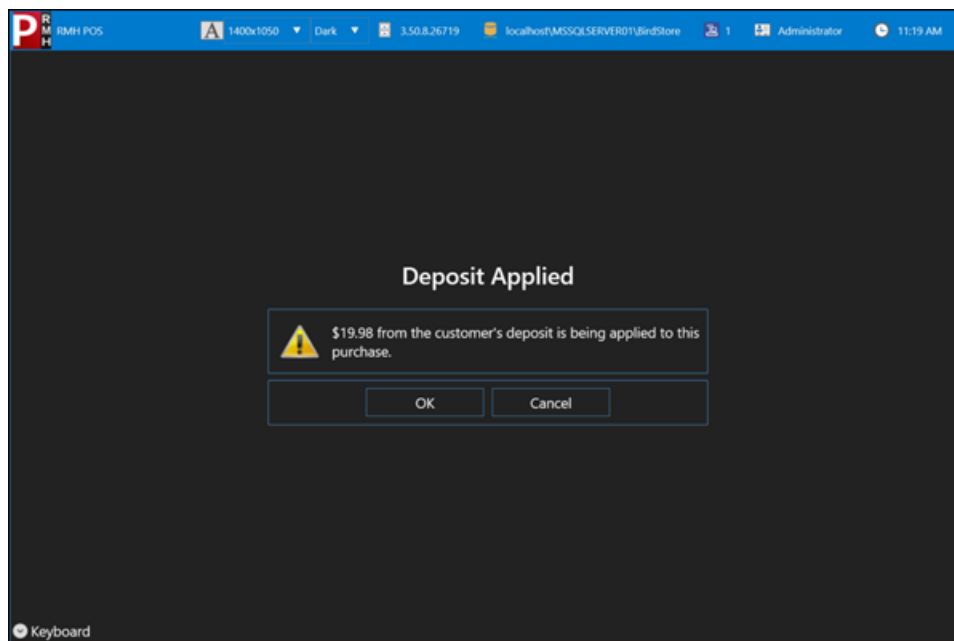
8.   Enter the amount next to the appropriate tender type.

9.   Tap **OK**.

10. Tap **Yes** to print the receipt.

     The receipt shows how many items were picked up by the customer, any additional payments made, and the remaining balance on the work order if applicable.

 Adding a comment to an order

1.   Tap **Orders | Order Details | Order Comment**.

2.   On the **Order Comment** screen:

     a.   (Optional) Enter a reference number in the **Ref #** field.

     b.   Enter the **Comment**.

     c.   Tap **OK**.

3.   Finish creating the order.

     The receipt shows the order comment at the top.

```
              Demo Store - Bird
             12446 Bethesda Ave1
              Bethesda MD 20812
               301-555-1212

              Work Order

Work Order #:        13
Account #:           000000000010
Date:  2023-10-26    Time:  11:37 AM
Cashier:  1          Register #:  1


    Customer will pick up 9:00am Oct. 30.


Item       Description                 Amount
========   ======================= =============
737539008  Seed/WBC/BirdWise Lg         $124.95
           5 @ $24.99
           RTD:                              0
           On Order:                         5
           Picked up:                        0

628209010  Fdr/BRM/Squirrel Buster Pnt  $179.97
           3 @ $59.99
           RTD:                              0
           On Order:                         3
           Picked up:                        0

7385731121 Wtr/BC/Goldfinch Set         $134.99
           RTD:                              0
           On Order:                         1
           Picked up:                        0

854246000  Chime/MOTS/Japanese Mezzo    $129.99
           RTD:                              0
           On Order:                         1
           Picked up:                        0

                                     =============
                       Sub Total        $569.90
        Hawaii General Sales Tax          $23.75
                 Maui Local Tax            $5.70
                          Total         $599.35

                Deposit Payment         $119.87
                 Total Purchased           $0.00
                     Total Due          $119.87

            Credit Card Tendered        $119.87
                     Change Due           $0.00

              Remaining Deposit         $119.87
                    New Balance         $479.48

            ||||||||||||||||||||||
                     13
         Thank you for shopping
            Demo Store - Bird
       We hope you'll come back soon!
```

When you recall the work order, you can also see the order comment at the top of the Transaction screen.

Adding a due date to an order

1. Create a new order or recall an existing order.

2. Tap **Orders** | **Order Details** | **Order Due**.

3. On the **Order Due** screen, enter the date on which the order should be ready for
    pick up.

    You can enter the date manually or click the calendar icon and select a date.

4.   Tap **OK**.

5.   Finish creating the order.

The due date displays in the transaction summary on the Transaction screen.

It may also be your store's policy to print a report of orders that are due on a specific date.

> **Note:** The **Order (Detailed) Report**, located under **Reports** | **Active Reports** | **Custom** | **Orders** in Store Manager, can be used to print out a list of orders that need to be fulfilled on the current or next business day.

Looking up order history

You can look up all transactions that are part of an open order (such as deposits and partial pick ups).

1. (Optional) Tap **Customers** | **Lookup Customer** or press **F7**.

2. (Optional) To select the customer, do one of the following:

   - Tap the customer's name once and tap **Select**.

   - Tap the customer's name twice.

   The customer's information displays in the **Customer** pane at the top of the POS screen.

3. Tap **Orders** | **Recalls** and select one of the following:

   - Recall a Work Order

   - Recall a Layaway

4. To select the order, do one of the following:

   - Tap the order once and tap **Add**.

   - Tap the order twice.

5. Tap **Orders** | **Order Details** | **Order History**.

6. To view the details of a specific transaction listed in the **Order History** screen, do one of the following:

- Tap the transaction once and tap **Select**.

- Tap the transaction twice.

The transaction receipt displays in the **Journal**.

7. Tap **Close** to exit the **Journal**.

8. View the details of other transactions listed in the **Order History** screen, as required.

9. Tap **Cancel** to exit the **Order History** screen.

Working with layaways

About layaways

Layaways are a specialized type of transaction where a store agrees to hold (or "lay away") items for a customer until the customer is able to pay for them.

Depending on your store's policies, customers may be required pay a deposit on layaways. The customer may also return to the store to make incremental payments on layaways. The customer cannot take layaway items home until the total amount owing on the items is fully paid.

For layaways, you must create a layaway order and, if required by your store's policies, tender the initial deposit. The customer can then return to the store at a later date to make additional payments or pay off the entire order.

Customers have the option to pick up some items from a layaway order and return at a later time to pick up the remaining items. However, customers must pay the total amount for all items they pick up. If the customer previously paid a deposit, POS calculates how much of the deposit applies to the items the customer is picking up, and the amount due is the total amount minus the applicable deposit.
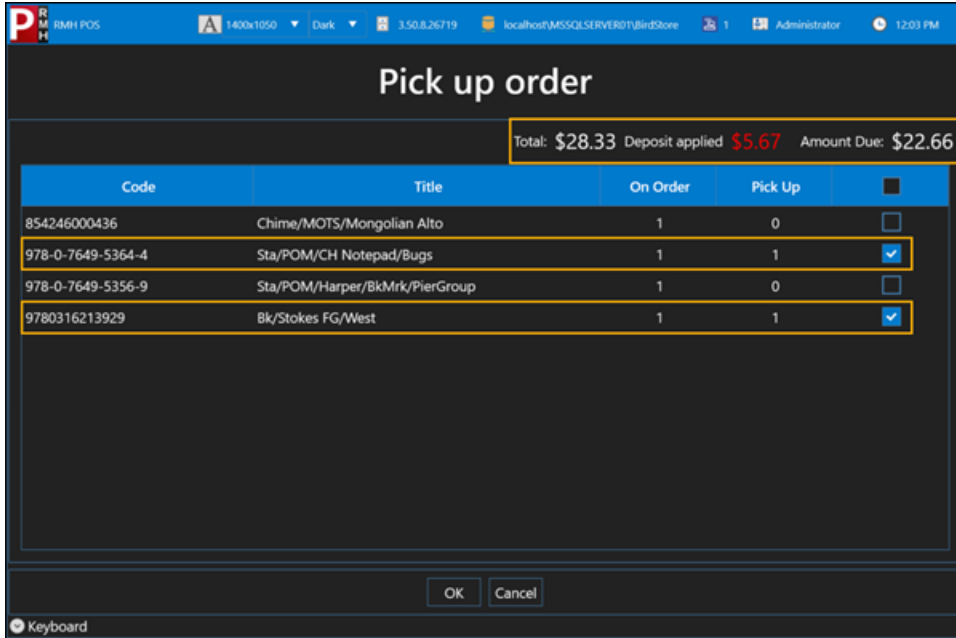
If the customer has already picked up part of the layaway order, you will see the quantity picked up in the **R.T.D.** (received to date) column. You will see the quantity remaining to be picked up in the **On Order** column. The **Balance** owing is the total amount of the layaway order minus any deposits or amounts paid previously.

Creating layaway orders

1. Tap **Orders | Layaway**.

    You will know that POS is in layaway mode if you see the layaway icon in the top right corner of the screen.
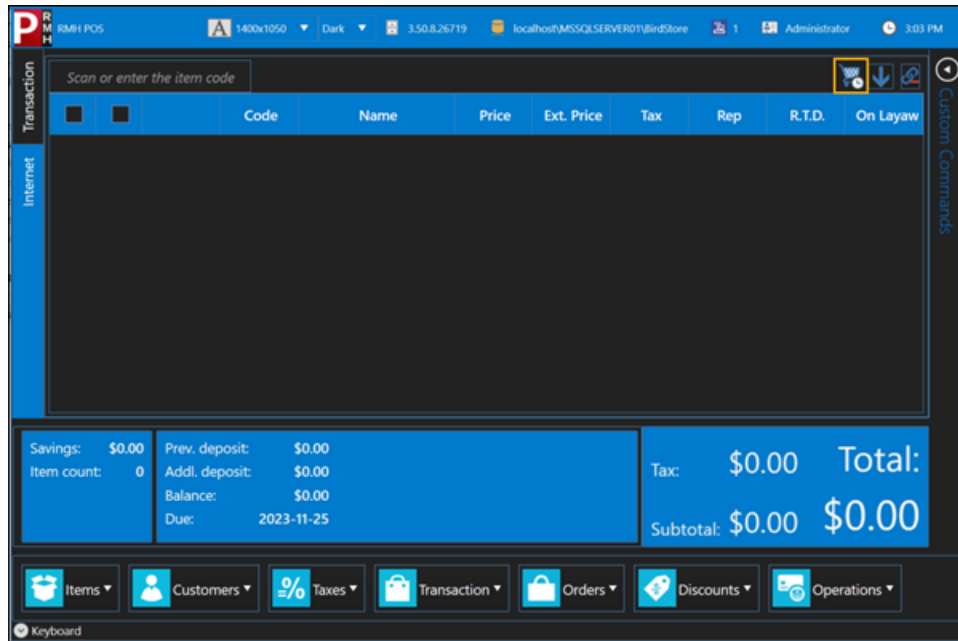
2. Tap **Customers | Lookup Customer** or press **F7**.

3. To select the customer, do one of the following:

    ▪ Tap the customer's name once and tap **Select**.

    ▪ Tap the customer's name twice.
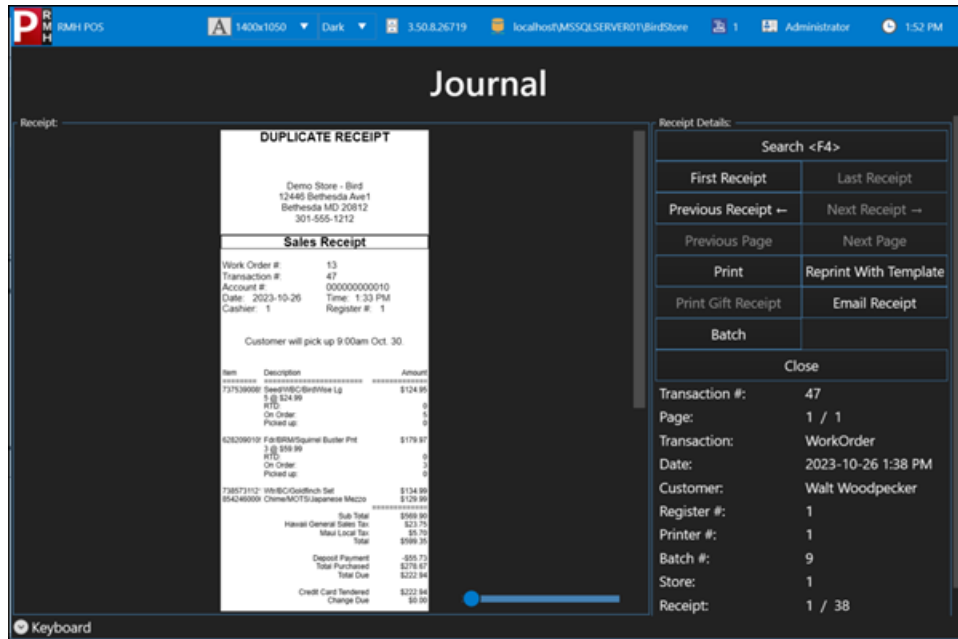
    The customer's information displays in the **Customer** pane at the top of the POS
    screen.

4. Enter all of the items in the layaway order.

    If your store requires customers to pay a deposit on layaways, the **Addl. deposit**
    field indicates the **minimum deposit amount**. The customer has the option to pay
    more than the amount shown in the **Addl. deposit** field.
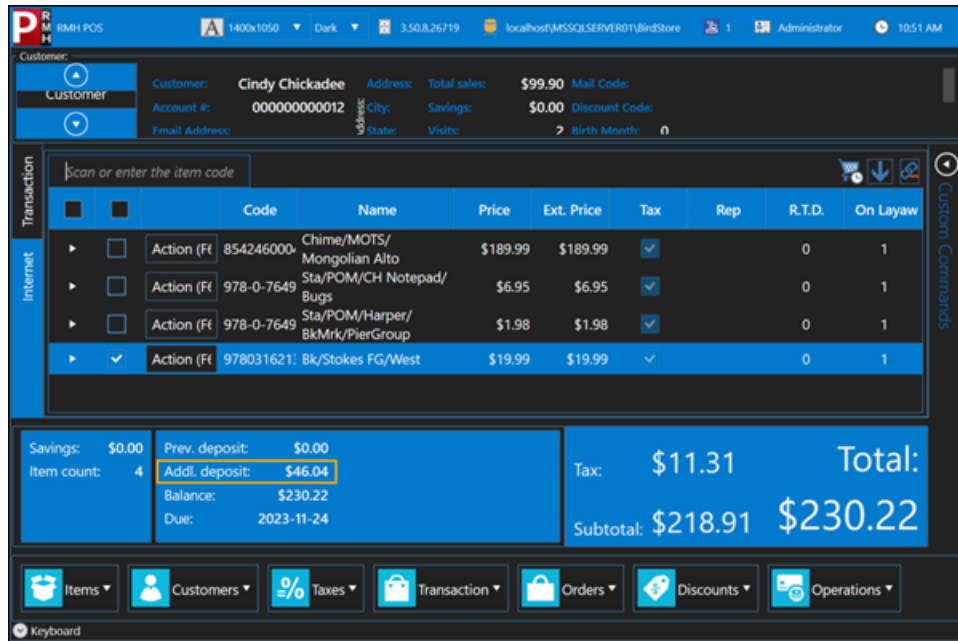
5. Tap **Transaction | Tender Sale** or press **F12**.

6. Enter the amount next to the appropriate tender type.

    > **Note:** Follow your store's policies regarding what tender types are accepted for layaway deposits. For example, many stores only accept cash, direct deposit, or check for layaway deposits.

7. Tap **OK**.

8. Tap **Yes** to print the receipt.

    The receipt shows the total layaway amount including tax, the deposit amount, and the balance owing on the layaway order.

```
              Demo Store - Bird
             12446 Bethesda Ave1
              Bethesda MD 20812
                 301-555-1212

┌────────────────────────────────────────┐
│                 Layaway                  │
└────────────────────────────────────────┘

Layaway #:           12
Account #:           000000000012
Date:  2023-10-25    Time:  10:59 AM
Cashier:  1          Register #:   1

Item      Description                  Amount
========  ======================  ============
854246000 Chime/MOTS/Mongolian Alto   $189.99
          RTD:                              0
          On Order:                         1
          Picked up:                        0

978-0-7649 Sta/POM/CH Notepad/Bugs      $6.95
          RTD:                              0
          On Order:                         1
          Picked up:                        0

978-0-7649 Sta/POM/Harper/BkMrk/        $1.98
           PierGroup
          RTD:                              0
          On Order:                         1
          Picked up:                        0

978031621 Bk/Stokes FG/West            $19.99
          RTD:                              0
          On Order:                         1
          Picked up:                        0
                                  --------------
                     Sub Total        $218.91
        Hawaii General Sales Tax         $9.12
               Maui Local Tax           $2.19
                        Total         $230.22

              Deposit Payment          $46.04
              Total Purchased           $0.00
                   Total Due           $46.04

               Cash Tendered           $46.04
                  Change Due            $0.00

             Remaining Deposit         $46.04
                 New Balance          $184.18

        ║█║█║║█║█║█║█║█║█║█║█║
                    12
        Thank you for shopping
           Demo Store - Bird
      We hope you'll come back soon!
```

Adding a comment to an order

1. Tap **Orders** | **Order Details** | **Order Comment**.

2. On the **Order Comment** screen:

    a. (Optional) Enter a reference number in the **Ref #** field.

b.   Enter the **Comment**.

c.   Tap **OK**.

3.   Finish creating the order.

The receipt shows the order comment at the top.

```
                Demo Store - Bird
                12446 Bethesda Ave1
                 Bethesda MD 20812
                   301-555-1212

                  Work Order

Work Order #:        13
Account #:           000000000010
Date:  2023-10-26    Time:  11:37 AM
Cashier:  1          Register #:  1


    Customer will pick up 9:00am Oct. 30.


Item      Description                     Amount
========  =======================   =============
7375390085 Seed/WBC/BirdWise Lg         $124.95
           5 @ $24.99
           RTD:                               0
           On Order:                          5
           Picked up:                         0

6282090105 Fdr/BRM/Squirrel Buster Pnt  $179.97
           3 @ $59.99
           RTD:                               0
           On Order:                          3
           Picked up:                         0

7385731121 Wtr/BC/Goldfinch Set         $134.99
           RTD:                               0
           On Order:                          1
           Picked up:                         0

8542460006 Chime/MOTS/Japanese Mezzo    $129.99
           RTD:                               0
           On Order:                          1
           Picked up:                         0

                                    =============
                   Sub Total            $569.90
        Hawaii General Sales Tax         $23.75
                 Maui Local Tax           $5.70
                          Total         $599.35

                Deposit Payment         $119.87
                 Total Purchased          $0.00
                      Total Due         $119.87

           Credit Card Tendered         $119.87
                     Change Due           $0.00

              Remaining Deposit         $119.87
                    New Balance         $479.48
```

||||||||

```
                        13
            Thank you for shopping
               Demo Store - Bird
         We hope you'll come back soon!
```

When you recall the work order, you can also see the order comment at the top of the Transaction screen.

Adding a due date to an order

1. Create a new order or recall an existing order.

2. Tap **Orders** | **Order Details** | **Order Due**.

3. On the **Order Due** screen, enter the date on which the order should be ready for
    pick up.

    You can enter the date manually or click the calendar icon and select a date.

4.   Tap **OK**.

5.   Finish creating the order.

The due date displays in the transaction summary on the Transaction screen.

It may also be your store's policy to print a report of orders that are due on a specific date.

> **Note:** The **Order (Detailed) Report**, located under **Reports** | **Active Reports** | **Custom** | **Orders** in Store Manager, can be used to print out a list of orders that need to be fulfilled on the current or next business day.

Looking up order history

You can look up all transactions that are part of an open order (such as deposits and partial pick ups).

1. (Optional) Tap **Customers** | **Lookup Customer** or press **F7**.

2. (Optional) To select the customer, do one of the following:

    ▪ Tap the customer's name once and tap **Select**.

    ▪ Tap the customer's name twice.

    The customer's information displays in the **Customer** pane at the top of the POS screen.

3. Tap **Orders** | **Recalls** and select one of the following:

    ▪ Recall a Work Order

    ▪ Recall a Layaway

4. To select the order, do one of the following:

    ▪ Tap the order once and tap **Add**.

    ▪ Tap the order twice.

5. Tap **Orders** | **Order Details** | **Order History**.

6. To view the details of a specific transaction listed in the **Order History** screen, do one of the following:

- Tap the transaction once and tap **Select**.

- Tap the transaction twice.

The transaction receipt displays in the **Journal**.

7. Tap **Close** to exit the **Journal**.

8. View the details of other transactions listed in the **Order History** screen, as
    required.

9. Tap **Cancel** to exit the **Order History** screen.

Processing layaway orders

If you look up the customer, when you recall the layaway, POS only displays layaways
belonging to the selected customer. If you do not look up the customer, when you recall
the layaway, POS displays all open layaways and you will have to search for the cus-
tomer's layaway order.

1. Tap **Customers** | **Lookup Customer** or press **F7**.

2. To select the customer, do one of the following:

    ▪ Tap the customer's name once and tap **Select**.

    ▪ Tap the customer's name twice.

The customer's information displays in the **Customer** pane at the top of the POS screen.

3. Tap **Orders | Recalls | Recall a Layaway**.

4. To select the customer's layaway order, do one of the following:

    ■ Tap the layaway order once and tap **Add**.

    ■ Tap the layaway order twice.

5. If the customer is making a payment:

    a. Tap **Orders | Payments | Payment on Layaway**.

    b. On the **Layaway Payment** screen, enter the payment amount.
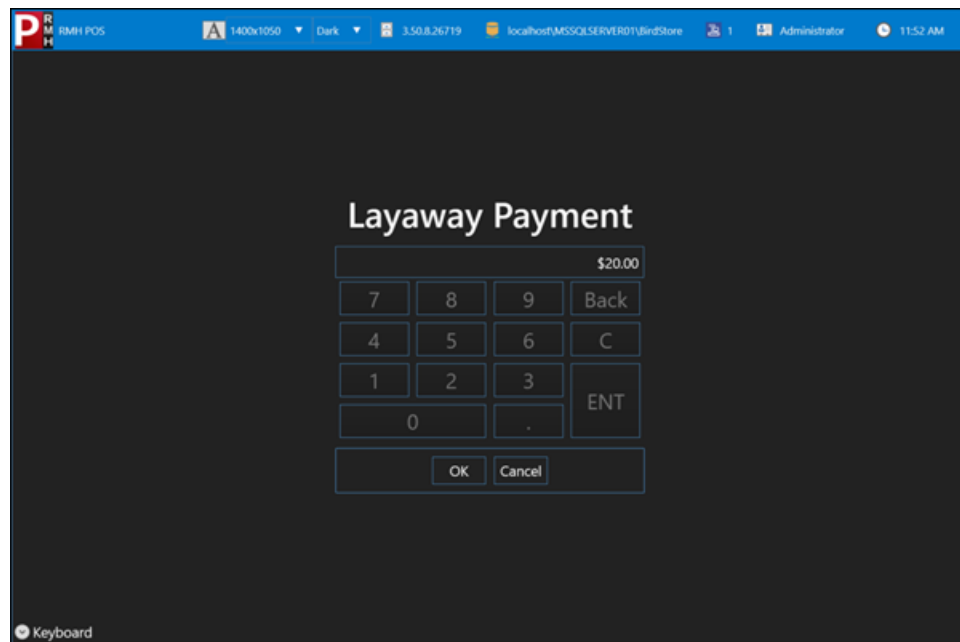
    c. Tap **OK**.

6. If the customer is picking up all or part of their layaway order:

a. Tap **Transaction** | **Tender Sale** or press **F12**.

b. From the **Select Order Action** screen, tap one of the following:

○ Pick up Entire
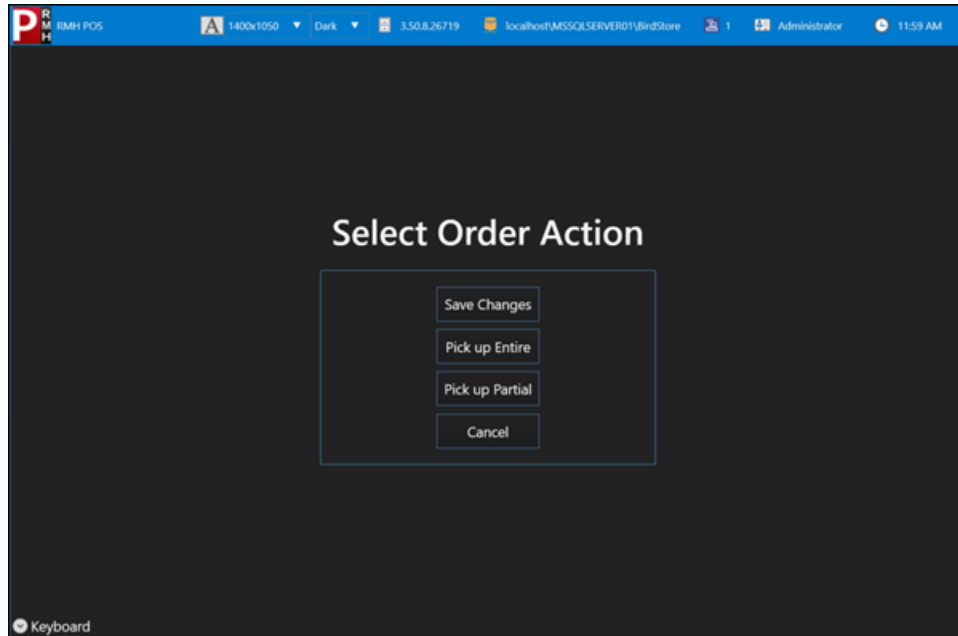
○ Pick up Partial

7. If the customer is picking up part of the layaway order:

a. Tap the items the customer is picking up to select them.

b. (Optional) In the **Pick Up** column, enter the quantity of the item the customer
    is picking up.

c. Tap **OK**.

d. If the customer paid a deposit on the layaway order, tap **OK** to confirm the
    amount of the deposit that is being applied to the pick up.
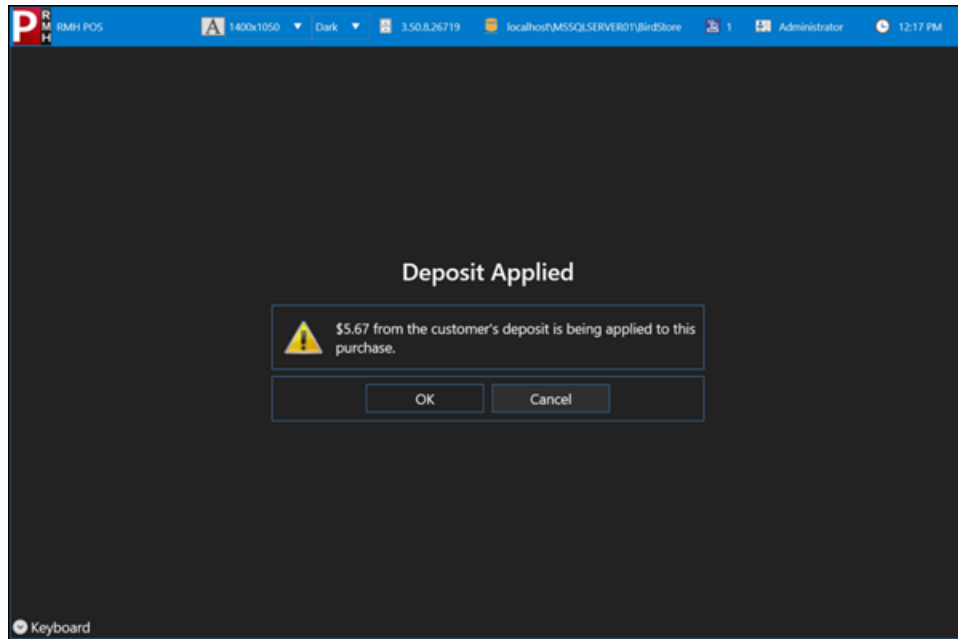
8. Enter the amount next to the appropriate tender type.

9. Tap **OK**.

10. Tap **Yes** to print the receipt.

Working with store credit/accounts

About store credit/accounts

Some stores offer **store credit** to approved people or companies. With store credit, a person or company can make purchases up to their credit limit and pay for those purchases at a later date, like a credit card. They also agree to payment terms such as payment due dates and minimum payment amounts.

Store credit is also called **accounts receivable (AR)**, because the customer is making purchases on **account** and the payment for those purchases is will be **received** in the future. In most stores, only managers can set up AR accounts for customers. However, in some stores senior cashiers or salespeople are also allowed to set up AR accounts.

To make a purchase on store credit, the person or company must:

- Be a customer in POS.

- Have an AR account in POS.

You can add a customer and create their AR account at the same time. In POS, on the **Customer** screen, simply select **Create A/R Account** on the **Customer** tab. When you tap **Save**, the customer's AR account is automatically created. (The payment due dates, minimum payment, and other account terms are set up in Store Manager.)
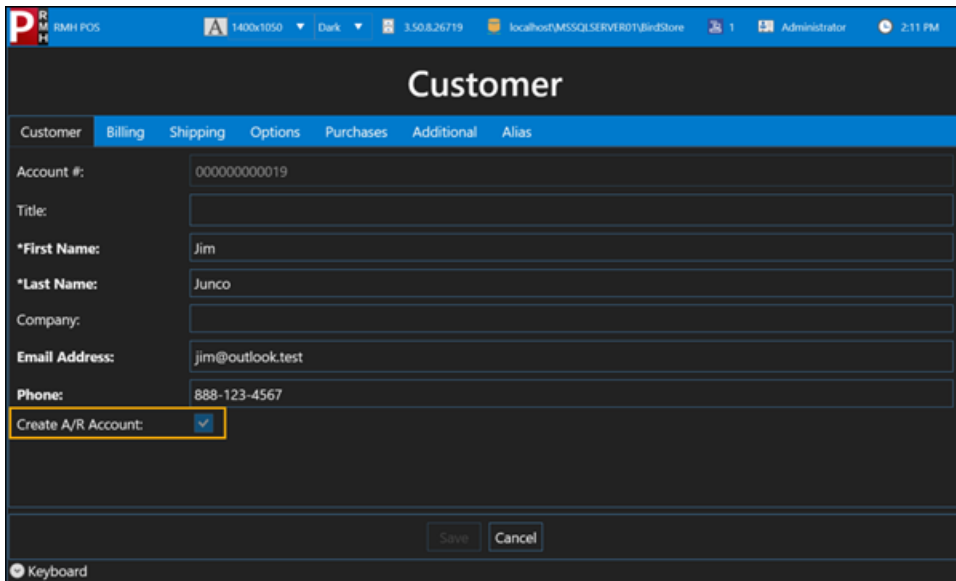
The customer record and the AR account record are linked. When a cashier looks up a customer with a linked AR account, they can see both their customer information and their AR information at the top of the screen:
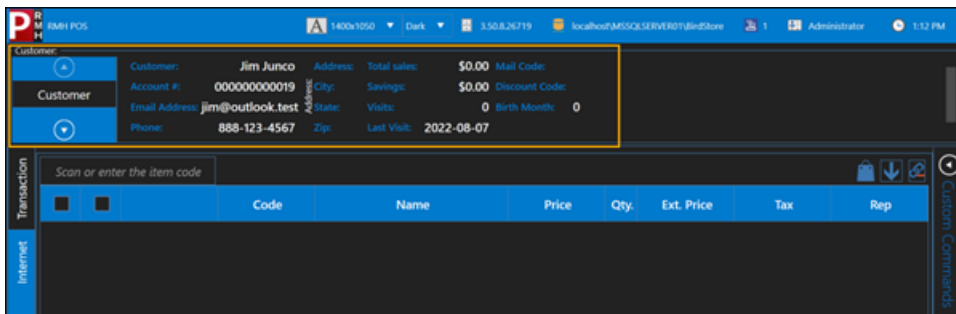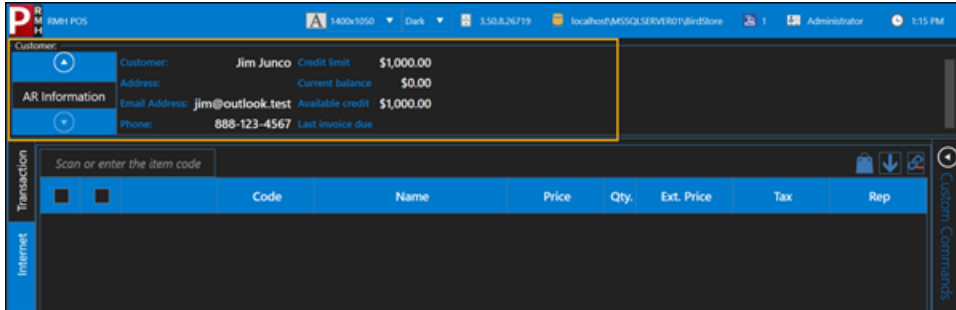
To process a purchase on store credit, the cashier adds items to the transaction and tenders the sale just like a normal purchase. However, on the Tender screen, they enter the tender amount next to the Store Credit tender type (or a similar tender type set up by the store). When the sale is completed, the customer does not have to pay anything. Instead, the tender amount is added to the customer's AR account balance.

Tendering a sale on store credit/account

1.   Look up the customer. Refer to Looking up customers for more information.

2.   Enter all of the items in the transaction.

3.   Tap **Transaction | Tender Sale** or press **F12** or **Enter**.

4.   On the **Tender** screen, enter the tender amount next to the **Store Credit** tender type.

     The name of the **Store Credit** tender type is customizable and may vary by store. Your store may call it Account, Store Charge, Charge Account, Credit Line, or something else. In the example below, it's called Store Charge.
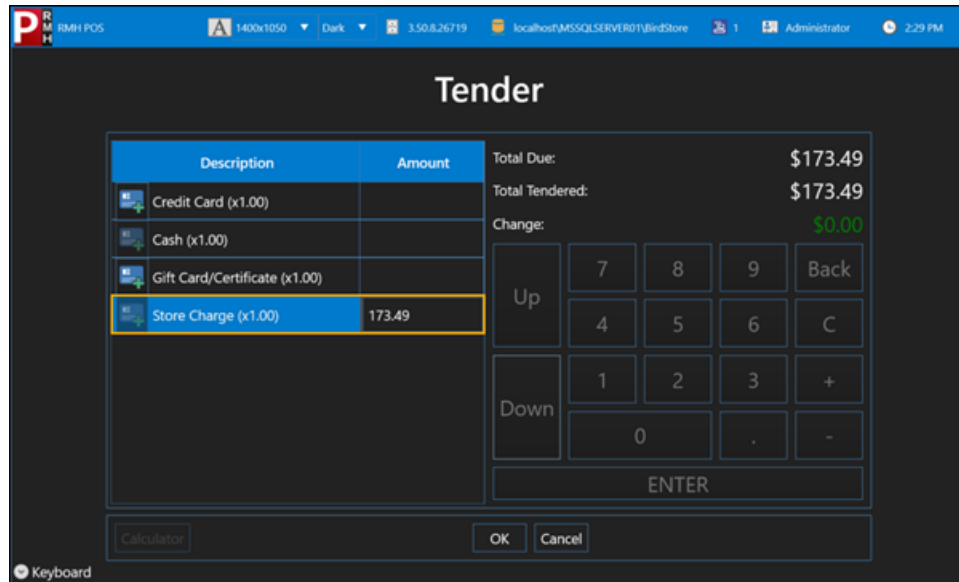
5. Tap **OK**.

6. On the **Register Transaction** screen, you can see the customer's next payment due date, their current balance due, and their available credit. Follow your store's policies regarding sharing this information with the customer.

7. Tap **Finish**.

8. Tap **Yes** to print the receipt.

   The receipt shows the tender type used for this purchase (in this case, it was Store Charge), the previous balance on the AR account, and the new balance (including this purchase).

```
              Demo Store - Bird
            12446 Bethesda Ave1
             Bethesda MD 20812
               301-555-1212

                 Sales Receipt

Transaction #:       33
Account #:           000000000019
Date:  2023-09-28    Time:  2:37 PM
Cashier:  1          Register #:  1

Item      Description               Amount
========  =====================  ============
0219641030 Fdr/DY/Hopper/Green Big Top   $89.99
0219641035 Fdr/DY/FlyThr/Domed Seed      $34.99
           Saver
0219641036 Fdr/DY/Winner Window Fdr       $39.99
                                 ============
                  Sub Total        $164.97
       Hawaii General Sales Tax       $6.87
           Maui Local Tax             $1.65
                  Total           $173.49

                Store Charge      $173.49
              Previous Balance      $0.00
                 New Balance      $173.49

                 Change Due         $0.00

              Thank you for shopping
                Demo Store - Bird
            We hope you'll come back soon!
```

Processing payments to account

Most stores mail or email monthly invoices to customers who have store credit (accounts). These invoices identify the total balance owing on the account on the invoice date. They also specify payment terms such as the payment due date and the minimum payment amount. This topic describes how to process payments against open invoices.

1. Look up the customer. Refer to <u>Looking up customers</u> for more information.

2. Tap **Customers** | **Payment to Account**.

    In the top right of the **Payment to Account** screen:

- **Total Balance** shows the total amount of all open (unpaid) invoices.

- **Total Credit** shows the total amount of any unapplied (available) credit memos.

  A credit memo is created if the customer returns an item (or items) that were purchased on store credit, or if the customer has accidentally overpaid an invoice. Credit memos can only be applied to open invoices.

- **Balance Due** shows the difference between Total Balance and Total Credit (e.g., Total Balance - Total Credit = Balance Due).

3. Do one of the following:

- If the customer wants to pay for specific open invoices, tap the invoices to select them.

- If the customer wants to pay for all open invoices, tap the **Pay all** button.

  Note: If the customer's account is set up so they are required to pay older invoices first, you may have to select the older invoices before you can select newer invoices.

4. (Optional) Select **Apply Credit** to apply any available credit memos to the selected invoices. The total amount of the applied credit memos displays in the **Applied Credit** field.

  Note: If you do not select **Apply Credit**, any unapplied credit memos will not be applied to the selected invoices. Instead, the credit memos will remain available to apply to open invoices in the future.

5. (Optional) Tap in the **Payment Received** field and enter a different payment amount.

  The amount shown in the **Payment Received** field defaults to the total amount of all selected open invoices. However, if **Apply Credit** is selected, the amount

shown is the difference between the selected open invoices and the applied credit memos. You can edit the amount in this field if the customer is giving you a different amount, e.g., they are making a minimum or partial payment on the selected invoices.

6. (Optional) Tap in the **Reference** field and enter the statement number.

7. (Optional) Tap in the **Description** field and enter any comments about the payment.

8. Tap **OK**.

9. On the **Payment** screen, enter the enter the payment amount next to the relevant tender type.

    Note: A customer cannot make a payment to account using a Store Credit tender type. Follow your store's policies regarding what tender types are accepted for payments to account. For example, many stores do not accept payments to account by debit card or credit card because they are charged transaction fees on those tender types.
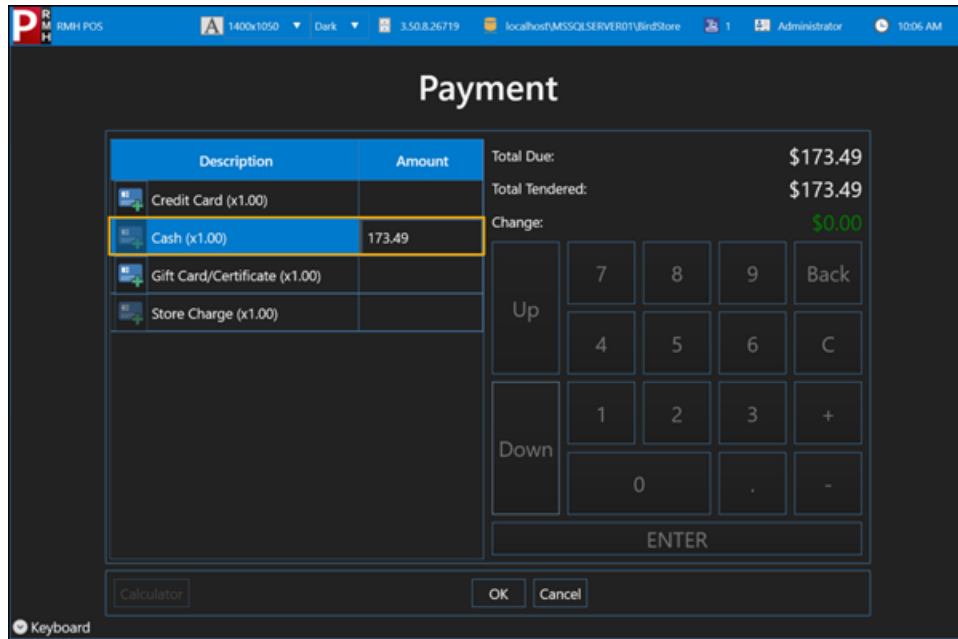
10. Tap **OK**.

11. Tap **Yes** to print the receipt.

    The receipt shows which invoices the customer paid for, how much they paid, and the remaining balance on those invoices (if applicable). The receipt also shows any unpaid invoices and the new balance owing on the account.

```
            Demo Store - Bird
          12446 Bethesda Ave1
           Bethesda MD 20812
             301-555-1212

         Account Payment

Payment #:        1
Account #:        000000000019
Date:  2023-09-29   Time:  9:45 AM
Cashier:   1        Register #:   1


Payment                      $173.49
Reference         TR:33
Inv. Date         2023-09-28
Due Date          2023-10-17
Orig. Amt.         $173.49
Prev. Bal.         $173.49
New Bal.             $0.00

Payment                        $0.00
Reference         TR:34
Inv. Date         2023-09-28
Due Date          2023-10-17
Orig. Amt.         $420.64
Prev. Bal.         $420.64
New Bal.           $420.64


       Total Payments    $173.49
        PAID Cash        $173.49

          1
    Thank you for shopping
       Demo Store - Bird
   We hope you'll come back soon!
```

Performing returns and exchanges

Processing returns

Sometimes you will need to process a return on all or part of a transaction. For example, you might realize that the wrong item was added or the quantity of an item was wrong.

Pre-requisites: Follow your store's policies and procedures for processing returns.

1. On the POS transaction screen, do one of the followinsg:

▪ Tap **Transaction** | **Recall Transaction** | **Recall for Return**.

▪ Tap **Tranaction** | **Sale/Return/No Sale** | **Return** or press Ctrl-F4.

If you select **Transaction** | **Sale/Return/No Sale** | **Return**, it puts POS into return mode. All items that you enter are considered returns.

2. On the **Recall for Return** screen, do one of the following:

▪ If the transaction was completed recently, scroll down and select the transaction number from the list; or
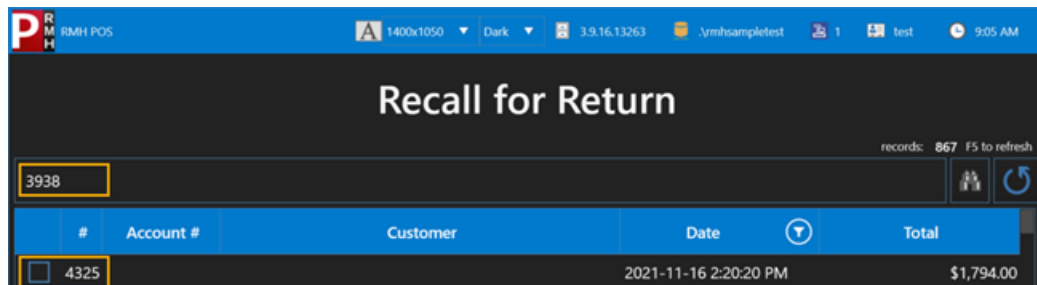
▪ If the transaction was not completed recently, do one of the following:

▪ Enter the transaction number from the customer's receipt into the lookup field and press **Enter**; or

▪ Enter the customer's name, phone number, or any combination and press **Enter** to search for the customer's list of transactions.

3. Tap **Add**.

4. If you are prompted for a reason code, on the **Select Reason Code** screen, select the appropriate reason for the return and tap **OK**.
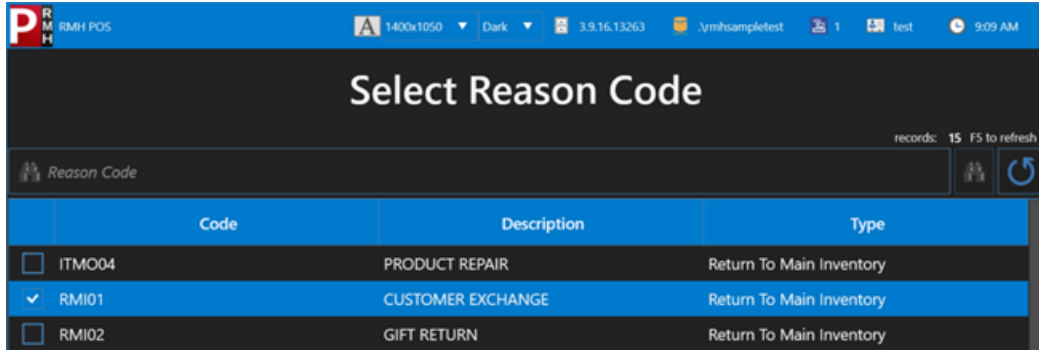
5. On the POS transaction screen, the items that were purchased in the recalled trans-action are listed in red. Do one of the following:

- If the customer wants to return a specific item or items, click the check box next to the items. It there are multiple items in the transaction, scroll through the entire list to confirm that you have selected the correct item or items.
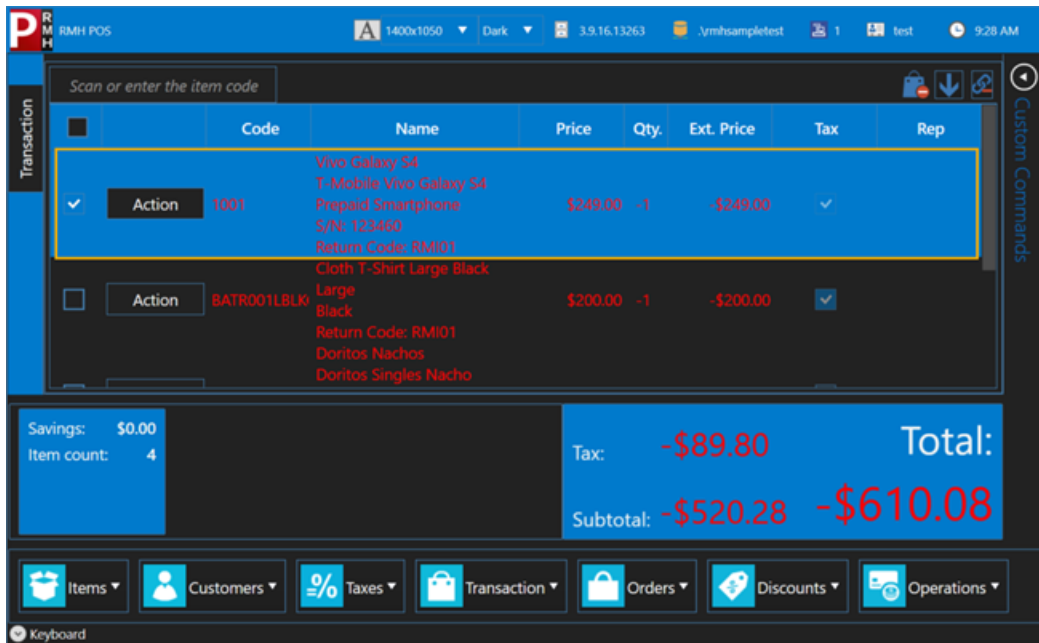
- If the customer wants to return all items, click the check box at the top of the check box column. This will automatically select all items in the transaction.
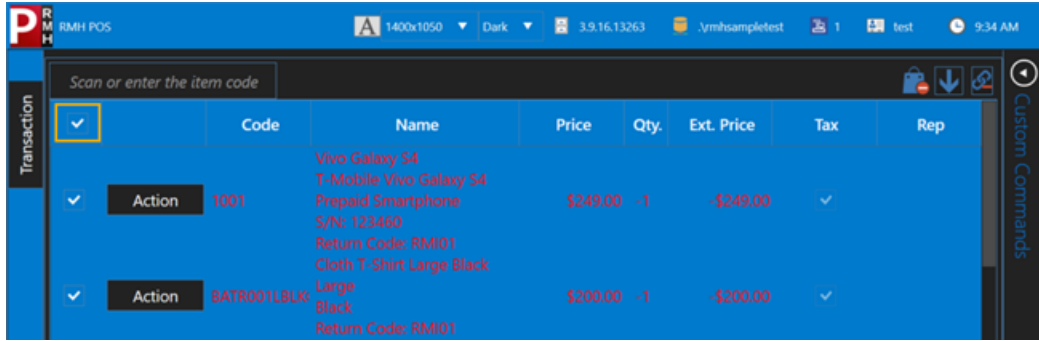
- If the customer purchased a quantity of a specific item, e.g., four packs of beer, and wants to return a portion of that quantity, click the check box beside the item and click **Action**. Use the **+** and **-** keys to indicate what quantity the customer wants to return and click **OK**.
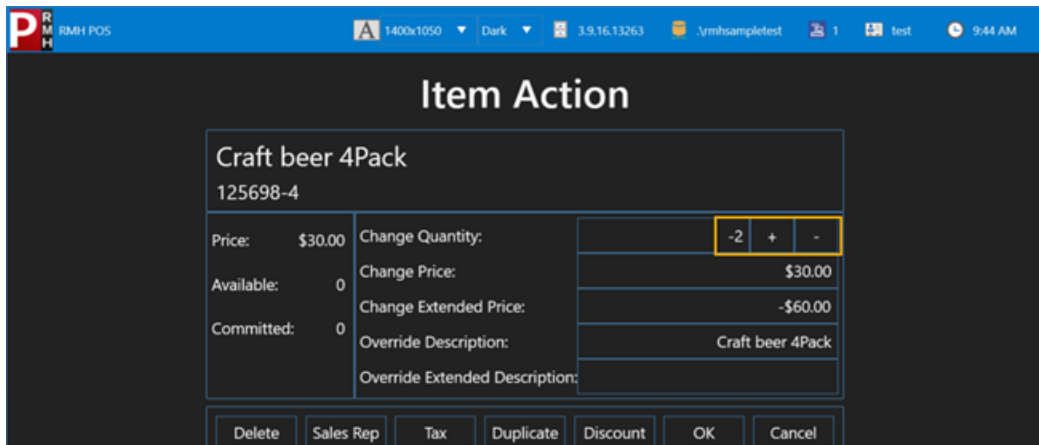
6.   Tap **Transaction | Tender Sale**.

7.   On the **Tender** screen, enter the tender amount next to the relevant tender type.

Follow your store policy about tendering returns. In most stores, you must use the original transaction tender for returns, e.g., if the customer used a VISA card ending in 1234 as the tender you must use the same card when tendering the return.

> **Tip:** If the customer is paying the entire amount using one tender type, you do not have to type the amount out. Instead, click in the amount field next to

the appropriate tender type and press + on the keyboard. POS auto-

matically enters the full amount of the transaction for that tender type.

8. Tap **OK**.

9. Tap **Yes** to print a receipt.

```
            RMH Sample
        7727 Lake Underhill Road
           Orlando FL 32899
            (407) 303-8110
            (407) 303-8110

         Sales Receipt

Transaction #:        4330
Date:  2021-11-17    Time:  9:53 AM
Cashier:  test       Register #:  1

Item      Description                   Amount
========  =======================  =============
125698-4  Craft beer 4Pack              -$60.00
          Return Code: RMI01
          -2 @ $30.00
                                   =============
                   Sub Total           -$60.00
                       Total           -$60.00

                   Change Cash          $60.00

          |||||||||||||||||||||||
                  4330
         Thank you for shopping
         RMH Sample
         We hope you'll come back soon!
```

Processing exchanges

Sometimes a customer will bring an item back to the store to exchange it for the same item or a similar item. Examples include items that are not working properly or were damaged when the customer opened the packaging.

Pre-requisites: Follow your store's policies and procedures for processing returns.

There are two methods for entering exchanges at the point-of-sale:

- **In sales mode:** With this method, enter the exchange item with a positive quantity and the returned item as a negative quantity. The return item must be a negative because, in sales mode, POS assumes every entry is a sale.
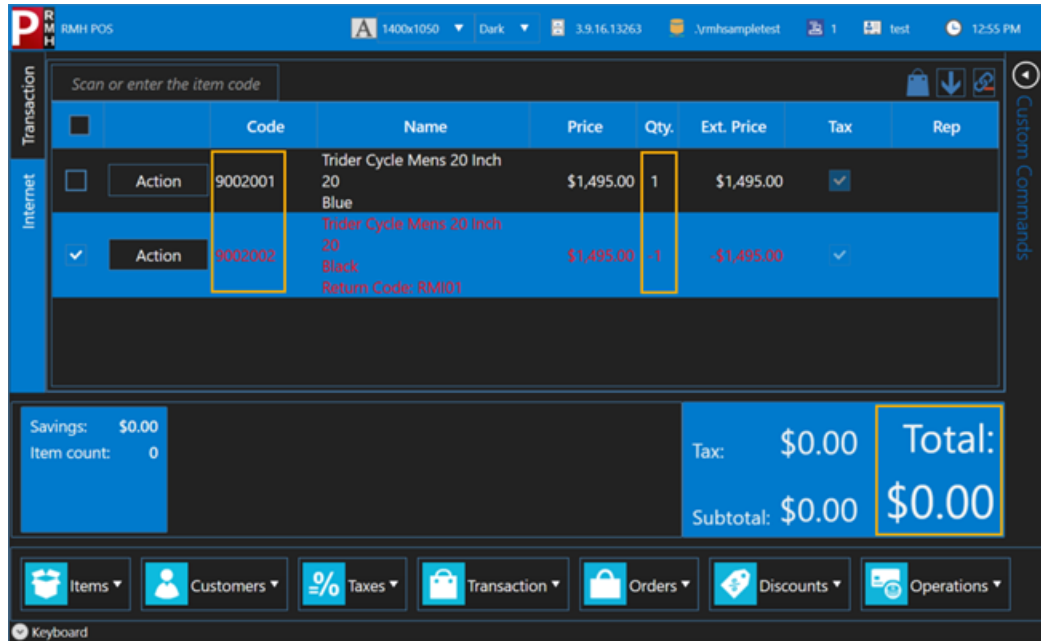
- **In return mode:** With this method, you click **Transaction | Sale/Return/No Sale | Return** to put POS into return mode, enter the exchange item with a negative quantity and enter the returned item as a positive quantity. The exchange (outgoing) item must be negative because, in return mode, POS assumes every entry is a return.

Processing refunds to a voucher

Some stores have a policy of refunding to a voucher when a customer returns an item. You can refund to a new voucher or to an existing voucher.

1. Process the return up to the point of tendering the sale.

2. Enter the refund amount next to the **Voucher** tender type.

    You can enter the full refund amount in the **Voucher** tender type or a portion of the refund amount. Follow your store's policies and procedures for refunds. The name of the **Voucher** tender type is customizable and may vary by store. Your store may call it Gift Voucher, Gift Card, Gift Certificate, or something else. In the example below, it's called Gift Voucher.

3. Tap **OK**.

4. If your store sells more than one type of voucher, on the **Select Voucher Item** screen tap the type of voucher and tap **Select**.

5. On the **Voucher Refund Verification** screen, do one of the following:

- Tap **Create new** to load the refund amount on a new voucher.

- Tap **Refund to existing** to load the refund amount on an existing voucher.

6. If you are refunding to a new voucher, if prompted, enter the voucher number

7. If you are refunding to an existing voucher, tap in the **Existing Number** field and enter the voucher number.

8. Tap **Search** or press **Enter**.

9. Tap **Select**.

10. Tap **Yes** to print the receipt.

    The receipt shows the new balance.

Administration

Entering your work hours

Your store may require you to enter your work hours in POS. You can enter the time you start your shift (when you "punch in") and the time you end your shift (when you "punch out") using the time clock in POS.

To punch in:

1. Tap **Operations** | **Time Clock**.

2. Enter your **User ID** and **Password** and press **Enter**.

3. Tap **Punch In**. The system automatically records your start time.

To punch out:

1. Tap **Operations** | **Time Clock**.

2. Enter your **User ID** and **Password** and press **Enter**.

3. Tap **Punch Out**. The system automatically records your end time.

Changing your password

To change your password in POS:

1. If necessary, tap **Operations** | **Secure** | **Login/Logout** or press **F9** to log out of POS.

2. On the **Login** screen, enter your **User ID**.
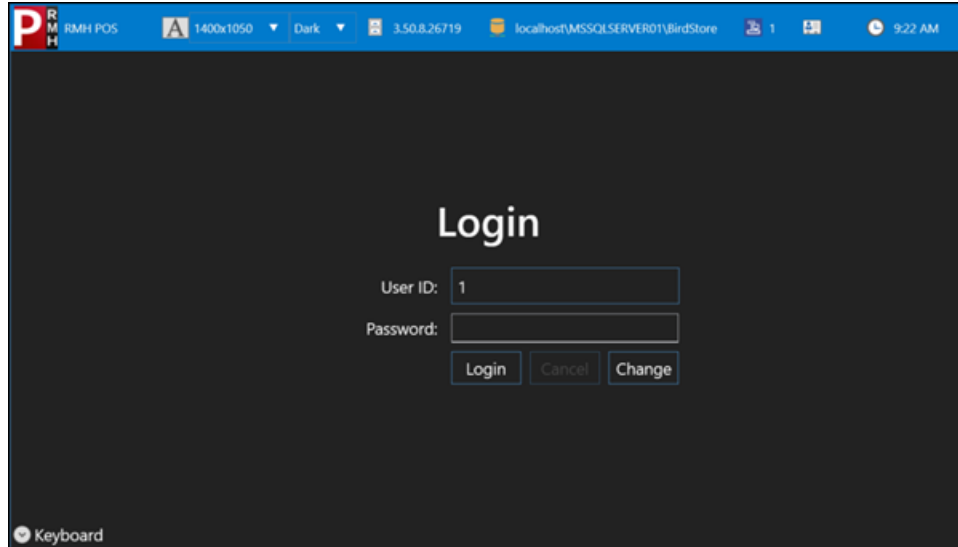
3. Tap **Change**.

4. On the **Change Password** screen:

    a. Enter your current password in the **Password** field.

    b. Enter your new password in the **New password** and **Confirm password** fields.

    c. Tap **OK**.
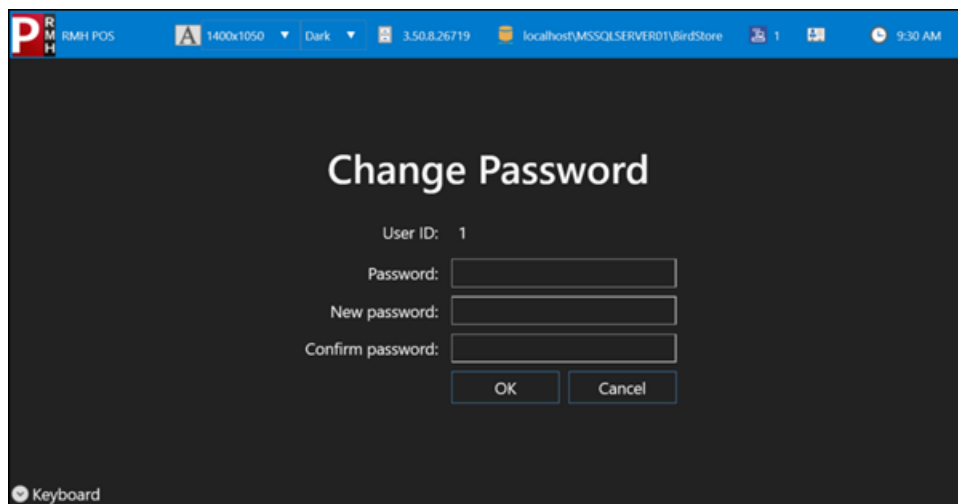
5. On the **Login** screen, enter your **User ID** and your new **Password** to log in to POS.

Glossary

A

accelerators
A mechanism for multiplying collected loyalty points.

alias
Aliases are like nicknames. You can define one or more aliases for an item. Aliases are a useful way to search for an item in POS or Store Manager. Each alias must be unique and cannot be the same at the item lookup code.

AR
The accounts receivable (AR) is money that is owed to a company by a customer who received products and services that were provided on credit.

assembly item
An assembly item is composed of items that are bundled or assembled into a package and sold under a separate lookup code, e.g., a gaming package with a controller, console, and game, or a cell phone contract that includes a specific cell phone. When a customer purchases an assembly item, the in-stock quantity of the individual assembly components is updated in the store database. More importantly, the cashier can change the quantity, price, or taxes of individual assembly components, e.g., the cashier can add or remove components and both the in-stock quantity of the components and the price of the assembly item are automatically adjusted.

B

back office
In a retail store, the back office usually refers to office space at the back of the store where managers and other team members perform tasks like counting cash, running reports, or reordering inventory out of sight of customers. This area may or may not be secured to prevent unauthorized entry. At Retail Management Hero, sometimes the Store Manager application is referred to as the Back Office Manager (BOM).

back order
An order for an item that is currently out-of-stock.

backup
A copy of a file, such as the store database, that is created in case the original file is damaged or deleted. Stores should backup their database every day.

bar code

A code that can be read by a scanning device. The bars that make up the barcode represent a series of numbers.

batch

Store Manager uses batches to export data to external accounting software applications. A unique batch number is assigned to each register when it is opened. This batch remains open until you run a Z report to close the register. You can then post the information in the closed batch to an external file that can be imported into your accounting software.

billing cycle

The period of time between billings for products or services, e.g., a month.

bin location

The location in the store where an item is stored.

blind closeout

A blind closeout is the process of closing a batch at a register without running a Z report. Typically, cashiers will perform a blind closeout at the register at the end of their shift and then take their cash drawer to the back office where they can balance their cash drawer and complete the closing process out of sight of customers.

block sale

You can block sales of items according to a schedule or starting or ending on a specific date.

buy X and get Y for Z

A type of discount where a customer buys a specified quantity of items ("X") at full price and then gets a specified number of items ("Y") for free or at a discounted price, e.g., BOGO or "buy one get one" free discounts.

C

cash drawer

A electronic cash drawer is a cash drawer that is connected to the register via a cable. Typically, electronic cash drawers open automatically at the end of a transaction.

child item

A child item is an item that can either be sold singly or in a specific quantity within a parent item, e.g., 24 single bottles of water (child) in a case (parent). When the on-hand quantity of the single item is depleted, the parent item can be opened up to add the single items to the quantity on-hand.

collection schedule
A set of rules which determines how the points are collected.

committed
A value that represents the quantity of an item that has been back ordered or work ordered. This value does not represent what is currently in-stock.

conversion rate
The ratio between two currencies, e.g., 1:2, which indicates how much of one currency is needed to exchange for the equivalent value of another currency. Store Manager uses the conversion rate to convert the local currency used by the store to a foreign currency.

custom commands
You can define custom commands that display on the right side of the POS screen. You might use custom commands to provide access to third party integrations or any custom POS functions that you have built using the POS Software Development Kit (SDK). At Retail Management Hero, these custom commands are sometimes referred to as shortcut keys that allow cashiers to access a function quickly. You can use custom commands with custom keys and task pads.

customer group
A group of customers to which collection or redemption apply. Consists of individual customer accounts.

D

database
A structured set of data that is stored and accessed by a computer software application. In relational databases, data is organized into tables that can be linked (related) based on a value that is common to each, e.g., a lookup ID or customer ID.

denomination
Denomination refers to the recognized face value of specific units of a currency, usually in the form of coins and bank notes. For example, in the U.S. the most recognized denominations for coins are pennies ($0.01), nickels ($0.05), dimes ($0.10), and quarters ($0.25). The most recognized denominations for bank notes are $1.00, $2.00, $5.00, $10.00, $20.00, $50.00, and $100.00.

device
In Retail Management Hero, a device refers to any electronic device such as a keyboard, monitor, cash drawer, scale, scanner, printer, etc.

drop
Excess cash that is removed from a cash drawer and put in the store's safe until the register is reconciled at the end of the cashier's shift.

E

EAN

The European Article Number (EAN) is an international numbering and barcode standard used to identify a specific item that is sold in a specific packaging configuration by a specific manufacturer.

exchange rate

The rate, e.g., 1.35, at which one country's currency can be exchanged for another currency. Store Manager uses the exchange rate to convert any amounts tendered in foreign currencies to the local currency.

F

field

A field in a computer software application is a drop-down, checkbox, or text box where you can select pre-defined values (drop-down or checkbox) or enter text (text box). Field data is stored in a database record.

function button

In the POS user interface, there are a number of function buttons at the bottom of the screen: Items, Customers, Taxes, Transaction, Orders, Discounts, and Operations. Use these button to access related functions.

G

gift card

There are two types of gift cards: (1) A voucher generated by the store in the form of a gift card, which may have a magnetic strip or barcode; and (2) A gift card from Visa, Amex, or another company that is processed through the payment system.

gift certificate

A type of voucher, usually printed on heavy card stock. The voucher number and prepaid dollar amount can be preprinted on the certificate or written on the certificate by the cashier. The gift certificate holder can use the certificate to purchase goods or services up to the total dollar amount specified on the certificate.

GL

The general ledger (GL) is a book that summarizes all of a company's financial transactions through offsetting debit and credit accounts.

GST

Goods and Services Tax (GST) is a value added tax. Countries that charge GST include Canada, the UK, France, Spain, Italy, Vietnam, Singapore, South Korea, and India.

I

incentive group
> A group of items to which collection or redemption may apply. An incentive group may contain individual items, or entire departments and categories.

inventory
> In a retail store, inventory refers to a list of items sold by the store and the quantity of each item that the store has on hand.

Inventory Wizard
> In Store Manager, the Inventory Wizard is a tool you can use to make bulk changes to items in your store database, e.g., change the item price, cost, reorder information, or sales tax, or apply discounts.

item
> In Retail Management Hero, items are specific goods or services sold by the store. Every item must have a unique item lookup code.

J

journal
> The journal contains all transactions in the store's database.

K

kit item
> Kit items contain other items that are in the store database but are only sold as one item, e.g., a first aid kit. Kit items are sold as standard items. Kit items and assembly items are not the same. When a customer purchases a kit item, the in-stock quantity of the individual kit components do not change in the store database. In addition, the cashier cannot change the quantity, price, or taxes of individual kit components.

L

Label Designer
> In Store Manager, the Label Designer is a tool you can use to create templates for your own labels, e.g., add graphics and custom text.

Label Wizard
> In Store Manager, the Label Wizard is a tool that you can use to select a template, enter filter criteria to select items, and then print the required number of labels for those items.

landed cost

Store Manager can automatically calculate the landed cost for each item received through purchase orders and inventory transfers. The landed cost of an item is the sum of the item's cost, tax, shipping, and other fees. You can specify the default cost distribution method that RMH Store Manager uses when items are received: Quantity, Value, or Manual.

lane

In a retail store, a lane refers to a checkout lane where a customer takes the items they wish to purchase so the cashier can add the items to a transaction in POS and collect payment. A lane may be configured as an actual lane, or it may simply be a counter or desk.

layaway

Layaway is a process where a customer pays for an item (or items) in increments. The customer only receives the item when it has been fully paid for. The customer typically pays a minimum deposit on the item to place it on layaway.

lookup code

A unique set of alphanumeric characters used to identify an item, e.g., barcode numbers if an item has a barcode.

lot matrix item

A lot matrix item is composed of items that are packaged in different quantities and have different prices based on the quantity purchases, e.g., a can of beer that may be sold individually, or in 6-pack, 12-pack, or 24-pack quantities. Lot matrix items typically have the same lookup code but have different prices that correspond to the lot size (e.g., package quantity).

loyalty batch

A complete set of the loyalty transactions - between the first instance of collecting the points, and redemption (full or partial).

loyalty points

A mechanism of collecting loyalty value. Depending on the collection, type may be awarded based on the purchased items price, quantity, or on the transaction subtotal.

loyalty program

A combination of the collection schedule and redemption schedule with some optional parameters (such as effective dates).

M

matrix item

A matrix item is composed of items that are essentially the same, e.g., t-shirts or pants, but vary in one or two ways like size or color. These items, or components,

typically have the same lookup code, description, and price as the matrix item. However, you have the option of setting up unique lookup codes, descriptions, and prices for each component. You can define up to three dimensions, e.g., size or color, to differentiate between components in the matrix. Within each dimension you can define several attributes, e.g., XS, S, M, L, XL, XXL, XXXL.

merchant account

A merchant account is a special business account set up to process debit and credit card transactions. It is not a normal bank account. Its sole purpose is to process debit and credit card transactions and deposit those funds into the store's checking account, minus any transaction fees.

mix and match

A type of discount where the customer can buy a specified quantity of items (the same item or similar items) for a discounted price, e.g., you have candy bars A, B, and C that you normally sell for $.85/ea. but you set up a mix and match discount where the customer can buy three of those candy bars, in any combination, for $1.99.

N

net display

A net display is a monitor, usually connected to a register, where you can display product photos, multimedia advertisements, or websites.

New Item Wizard

The New Item Wizard is a tool that you can use to add items and their components to the store database. The New Item Wizard is particularly useful for adding matrix, lot matrix, and assembly items to the store database.

no sale

In POS, a no sale is a type of transaction that allows the cashier to open the cash drawer without completing a sale. In Store Manager, you can control whether cashiers are allowed to enter a no sale. If they are allowed to enter a no sale, you can require a reason code and printed receipt.

O

offline database

You can set up POS to use an offline database if the network connection to the main database is disrupted.

offline inventory

Offline inventory are items that are not for sale, such as items that are damaged, have been returned, or that you plan to transfer out of the store. Note: Do not confuse offline inventory with items that are blocked for sale.

on hold

An on hold transaction is on that has not been completed. It has been saved for retrieval and completion at a later time. When an on hold transaction is retrieved, it appears in the state it was in when it was saved.

open up

When the on-hand quantity of a single (child) item is depleted, you can use Store Manager to open up the parent item and add the quantity of child items to the on-hand quantity for the single item, e.g, you open up a case of 24 bottles of water so you can sell the 24 bottles of water individually as single items. This is also known as breaking. It is a useful way to extract single items from carton or case inventories.

OPOS

OLE for Point of Sale (OPOS) is a standard that ensures that hardware and software is compatible. You can connect OPOS compatible hardware or peripherals, e.g., printers, pole displays, cash drawers, scales, and scanners, to registers running POS.

P

parent item

A parent item contains a set quantity of a single item, e.g., a case (parent item) of 24 bottles of water (single or child items). When the on-hand quantity of the single item is depleted, the parent item can be opened up to add the single items to the quantity on-hand.

payment provider

A payment provider is responsible for collecting cash from authorized debit or credit card transactions and depositing it into the merchant account according to the settlement transactions submitted by the store.

peripheral

A peripheral is a device, e.g., printer, scale, scanner, that is plugged in to a computer.

PO

A purchase order (PO) is an order for specific items that is placed with a supplier.

R

reason code

A reason code is a pre-defined list of explanations for a specific action, e.g., price correction, cancelled sale, staff discount, etc.

redemption schedule

A set of rules which determines how the points are redeemed.

register
A register refers to the computer running POS in a lane. A number of devices may be connected to the register, such as a monitor, keyboard, mouse, electronic cash drawer, scanner, or scale.

reorder point
The reorder point is the mimimum number of items you can have on-hand before you should place a PO with the supplier to reorder the item.

restock level
The restock level is the quantity of an item that you want to have in stock. Store Manager uses the restock level to computer the quantity of the item to order when you generate a PO for the item.

return
A return is a transaction in which a customer returns an item they purchased. They may return the item for exchange with the same or a similar item, or for a full or partial refund on the purchase price.

reward transaction
A sales transaction in which the collected loyalty value is being redeemed.

role
In Store Manager, you create roles for different employee functions in the store (e.g., manager, cashier, sales representative) and assign specific privileges or rights to the role. When you create a user account for a new employee you assign a role to the user account, and then customize their privileges or rights as required.

S

sales quote
A sales quote contains a list of items that the store or sales representative is willing to sell for the price specified in the quote. A sales quote is typically only valid for a limited period of time, e.g., two weeks.

serial number
A serial number is a unique identifier assigned to an item. It is typically a sequential or incremented number, e.g., 1, 2, 3, 4.

serialized item
A serialized item has a unique serial number assigned to it. Store Manager can track the purchase of serialized items by serial number.

settlement
Settlement is a process where the store sends authorized debit or credit card transactions to the acquiring bank to be processed. The acquiring bank then

"purchases" the transactions and deposits cash in the store's bank account.

T

tag along item

A tag along item is sold along with another item. When the other item is rung up at the register, the tag along item is automatically added to the sale.

tare weight

The tare weight is the extra weight accompanying an item that is not included in the item's weight when the sale price of the weighted item is calculated, e.g., packaging.

tender type

The tender type is a monetary classification, e.g., cash, debit, credit.

transaction

A transaction is any action at the register (using POS) that involves the entry of items from the store database, e.g., sales, returns.

U

UPC

A universal product code (UPC) is a type of code printed on item packaging that identifies the item. The code has two parts: a scannable barcode and a 12-digit number located beneath the barcode.

URL

A universal resource locator (URL) is a website address, e.g., http://www.rmh-pos.com

user account

A user account is required to log in to Central Manager, Store Manager, Loyalty, or POS. Every employee should have their own unique user account.

V

VAT

Value added tax (VAT) is a type of tax that is levied on the price of a product or service. It is typically applied to items when they are rung up at the register (the point-of-sale). Stores that charge VAT must have a VAT account with the government so they can both submit VAT that they collected from customers and request credit for VAT they paid for products and services.

void

You may opt to void a transaction if, for example, the customer paid for the transaction using the wrong credit card or debit card. When a transaction is voided, it is as if it never happened. Inventory is not affected, and the sale method is cancelled (for example, their card will not be charged). You can only void a transaction if the batch is still open. You cannot void transactions in closed batches.

voucher

A voucher is an item that acts as a gift card or gift certificate.

W

weighted item

A weighted item is an item whose sale price at the register (the point-of-sale) is determined by its weight. The cashier must input the weight of the item manually or through an electronic scale. The item may have an associated tare weight.

work order

A work order is a type of transaction that is saved so it can be retrieved and completed at a later time. A deposit is typically collected from the customer for work orders.

X

X report

An X report is a report that displays current sales statistics for a register. Running an X report does not close the batch; it only displays sales information.

XML

Extensible markup language (XML) is a way of formatting data so it is easy to distribute across networks or between computer software applications.

Z

Z report

A Z report is similar to an X report because it displays current sales statistics for a register. However, running a Z report closes the batch. You should only run a Z report once a day. Most stores run a Z report at store closing.

ZZ report

A ZZ report is similar to a Z report. However, it is a report on all of the Z reports that were generated since the last ZZ report.