POS User Guide

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.

About Loyalty Manager

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.

Common POS peripherals

POS is frequently deployed with the following peripherals:

- Touchscreen monitors
- OPOS scanners
- Windows or OPOS printers
- OPOS electronic cash drawers
- OPOS electronic scales for weighted items
- OPOS pole displays
- Net display monitors
- Keyboard and mouse

POS integrations

You can work with third-party software developers to integrate a wide range of payment platforms with POS. For more information on payment integration, refer to https://www.rmhpos.com/payment.

You can also integrate a variety of e-commerce, mobility, accounting and ERP, and reporting and analytics platforms with POS. For more information on these types of integrations, refer to https://www.rmhpos.com/integrations.

Weights and measures regulatory compliance

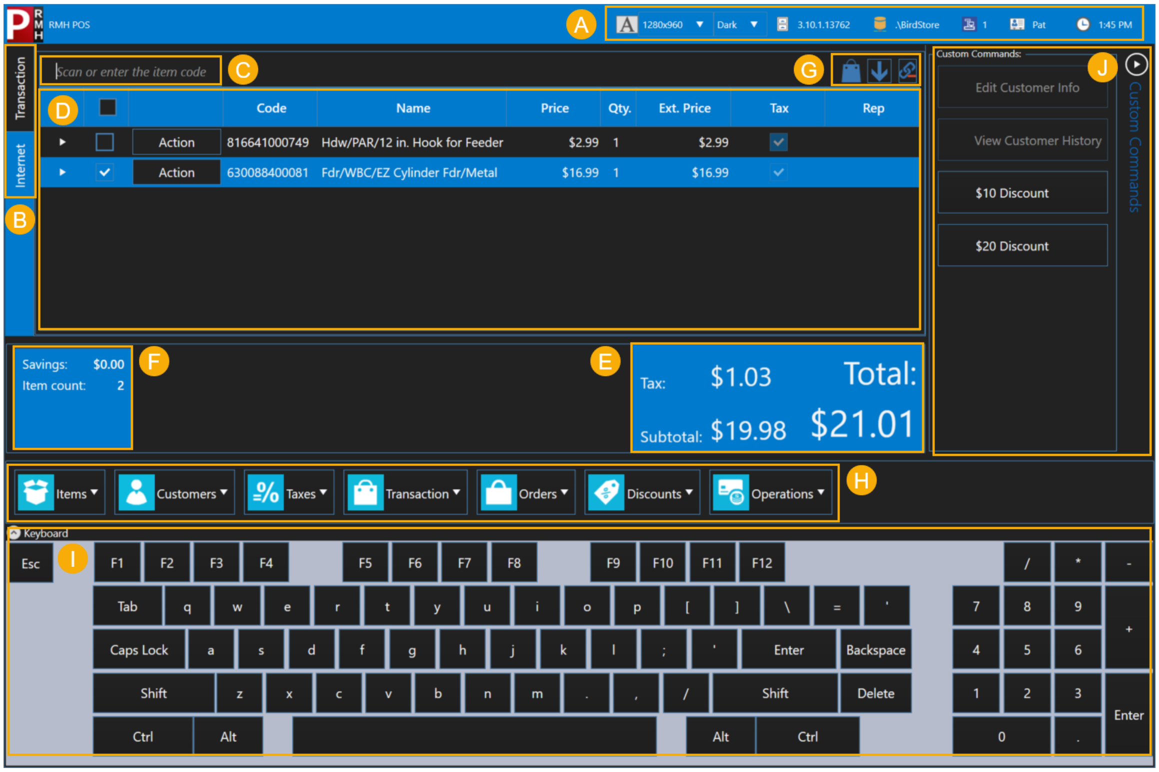
If you operate stores in locales where weights and measures (WAM) laws apply to retail sales, such as in the United Kingdom, you can configure POS to comply with WAM requirements.

POS Software Development Kit

You can use the open-source POS Software Development Kit (SDK) to create custom commands in POS, to program custom POS functionality, or to integrate third-party platforms with POS. The POS SDK is typically stored in C:\Program Files (x86)\Retail Hero\RMH POS\RMH POS SDK\SDK_POS.ZIP.

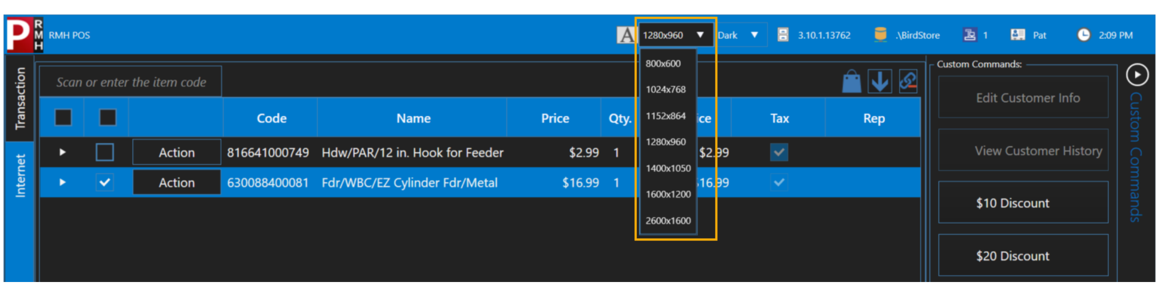
Getting started

Exploring the POS window

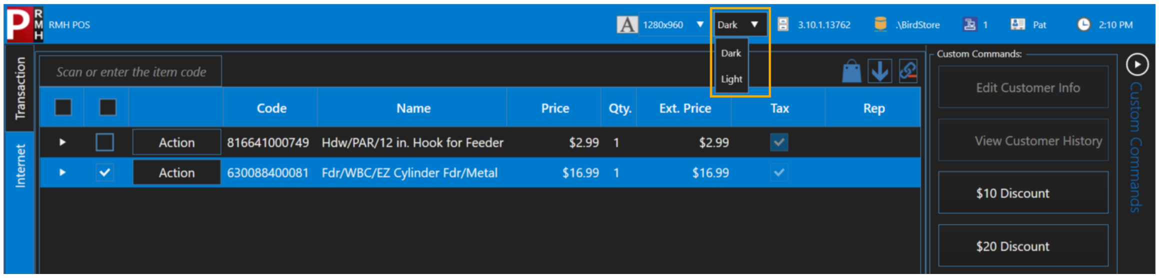


Title bar

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.



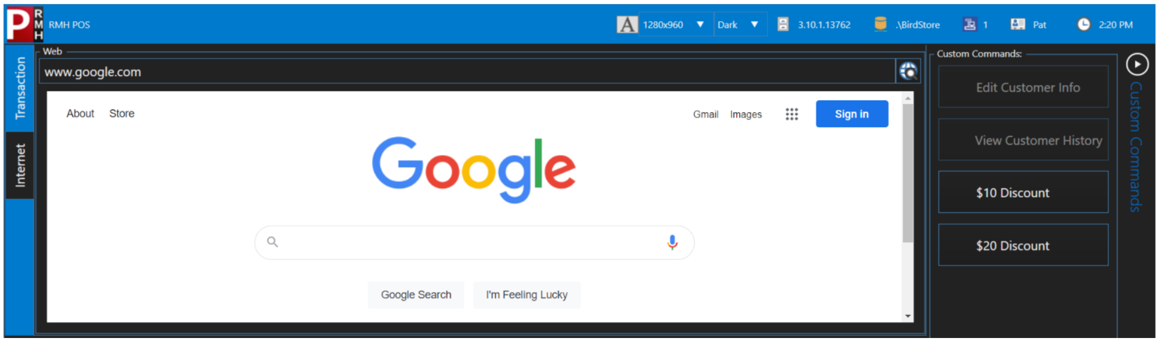
The title bar also shows information about POS, such as the store's weights and measures (WAM) certification number (not shown in screen shot), the POS software version, the name of the database that POS is connected to, the register number, the user name of the cashier who is logged in, and the current 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, lay-away, 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.

Configuring POS options to support store policies

Identifying and defining store policies

The first step in implementing Store Manager and POS should always be identifying your store's policies.

Your store's policies drive how you configure POS security. They also affect how you set up cashiers, registers, and cash drawers. and they can impact how you set up customers in the system. Store policies determine what kind of transactions are allowed in POS, what information and commands cashiers can access during a transaction, and what information cashiers are required to enter to complete a transaction.

Store policies you may want to identify before setting up Store Manager and POS might include:

Area	"At our store, do we want to...?"
POS security	▪ Require passwords to log on to POS? ▪ Set password complexity and reset policies? ▪ Force cashiers to log on for each POS transaction? ▪ Force cashier log off if POS is idle for a period of time? ▪ Prevent cashiers from exiting the POS app?
Register and cash drawer management	▪ Require decimal entry? ▪ Use change calculator? ▪ Require return of local currency? ▪ Require open/close amounts? ▪ Allow cashiers to enter opening/closing amounts? ▪ Allow cashiers to perform no sales, drops, or payouts?

Area	"At our store, do we want to...?"
	▪ Print receipts for no sales? ▪ Allow cashiers to generate X, Z, and ZZ reports? ▪ Set over/short limits for cashiers?
Customers	▪ Allow cashiers to add or edit new customers in POS? ▪ Require specific information (e.g., full name, phone number, email address) to save customers? ▪ Provide percent or price level discounts to specific customers? ▪ Enable accounts receivable (store credit) for specific customers? ▪ Display customers' accounts receivable information in POS?
Transactions	▪ Always display the Customer Lookup window? ▪ Prompt or require customer selection for transactions? ▪ Prompt or require sales representative selection for transactions? ▪ Prompt or require reason codes for discounts, inventory adjustments, no sales, returns, tax changes, drops, etc.? ▪ Allow cashiers to delete items from transactions? ▪ Allow cashiers to change item or transaction taxes? ▪ Allow cashiers to put transactions on hold? ▪ Allow cashiers to cancel transactions?

Area	"At our store, do we want to...?"
	▪ Allow cashiers to sell to store employees who have discounts? ▪ Set transaction amount limits? ▪ Set return amount limits?
Inventory	▪ Display item extended descriptions, notes, or sub-descriptions? ▪ Display out of stock items? ▪ Allow the sale of out of stock items? ▪ Allow back orders? ▪ Allow lookup of unknown items? ▪ Prevent the sale of inactive items? ▪ Allow cashiers to view or edit item cost? ▪ Allow cashiers to access pricing information? ▪ Allow serial numbers to be created (entered) in POS? ▪ Require unique serial numbers in POS? ▪ Enable random weight EAN and UPC codes?

Security policies

It is always a best practice to define your store's security policies.

I want to...	To set up, go to...
Require passwords to log on to POS	1. Click **Setup**. 2. Expand **People & Security**.

I want to...	To set up, go to...
	3. Click **Users**. 4. Do one of the following: ▪ Click **New** to create a new user. ▪ Double-click an existing user. 5. On the **General** tab, enter a **Password**.
Set password complexity and reset policies	1. Click **Setup**. 2. Expand **People & Security**. 3. Click **Password Policy**.
Force cashiers to log on for each POS transaction	1. Click **File | Configuration**. 2. Click **Store Rules**. 3. Expand **POS Options**. 4. Select **Force logon each sale**.
Automatic cashier log off if POS is idle for a period of time	1. Click **Setup**. 2. Expand **Hardware**. 3. Click **POS Profiles**. 4. Do one of the following:

I want to...	To set up, go to...
	▪ Click **New** to create a new POS profile. ▪ Double-click an POS profile. 5. On the **General** tab, in the **Idle logoff timeout (Sec.)** field, enter how many seconds POS can be idle before automatically logging off the user. **Note:** Assign the POS profile to the appropriate register(s).
Prevent cashiers from exiting the POS app	1. Click **Setup**. 2. Expand **People & Security**. 3. Click **Users**. 4. Do one of the following: ▪ Click **New** to create a new user. ▪ Double-click an existing user. 5. On the **General** tab, in **POS User Roles**, clear the check mark beside **Allowed to Exit POS**.

Register and cash drawer policies

Stores should always have policies defined for register and cash drawer management.

I want to...	To set up, go to...
Require decimal entry	1. Click **File** | **Configuration**. 2. Click **Store Rules**. 3. Expand **General Options**. 4. Select **Require decimal entry**.
Use change calculator	1. Click **File** | **Configuration**. 2. Click **Store Rules**. 3. Expand **POS Options**. 4. Select **Use change calculator**.
Require return of local currency	1. Click **File** | **Configuration**. 2. Click **Store Rules**. 3. Expand **POS Options**. 4. Select **Return local currency**.
Require open/close amounts	1. Click **File** | **Configuration**. 2. Click **Store Rules**. 3. Expand **General Options**. 4. Select **Force open/close amounts**.

I want to...	To set up, go to...
Allow cashiers to enter opening/closing amounts	1. Click **Setup**. 2. Expand **People & Security**. 3. Click **Users**. 4. Do one of the following: ▪ Click **New** to create a new user. ▪ Double-click an existing user. 5. On the **General** tab, in **POS User Roles**, select the following: ▪ **Allowed to enter opening amounts.** ▪ **Allowed to enter closing amounts**.
Allow cashiers to perform no sales, drops, or payouts	1. Click **Setup**. 2. Expand **People & Security**. 3. Click **Users**. 4. Do one of the following: ▪ Click **New** to create a new user. ▪ Double-click an existing user. 5. On the **General** tab, in **POS User**

I want to...	To set up, go to...
	Roles, select the following: ▪ **Allowed to perform no sales** ▪ **Allowed to perform drops and pay outs**
Print receipts for no sales	1. Click **File** | **Configuration**. 2. Click **Store Rules**. 3. Expand **POS Options**. 4. Select **Print no sale receipt**.
Allow cashiers to generate X, Z, and ZZ reports	1. Click **Setup**. 2. Expand **People & Security**. 3. Click **Users**. 4. Do one of the following: ▪ Click **New** to create a new user. ▪ Double-click an existing user. 5. On the **General** tab, in **POS User Roles**, select the following: ▪ **Allowed to generate X reports** ▪ **Allowed to generate Z & ZZ reports**

I want to...	To set up, go to...
Set over/short limits for cashiers	1. Click **Setup**. 2. Expand **People & Security**. 3. Click **Users**. 4. Do one of the following: ▪ Click **New** to create a new user. ▪ Double-click an existing user. 5. On the **General** tab, in **Over/Short Limits**, select one of the following: ▪ **Limit amount** ▪ **Limit percent**

Customer policies

It is important to define customer policies.

I want to...	To set up, go to...
Allow cashiers to add new customers in POS	1. Click **File** | **Configuration**. 2. Click **Store Rules**. 3. Expand **Customer Options**. 4. Select **Allow new customers at POS**.

I want to...	To set up, go to...
Allow cashiers to edit customers in POS	1. Click **Setup**. 2. Expand **People & Security**. 3. Click **Users**. 4. Do one of the following: ▪ Click **New** to create a new user. ▪ Double-click an existing user. 5. On the **General** tab, in **POS User Roles**, select **Allowed to view and edit all customers**.
Require specific information (e.g., full name, phone number, email address) to save customers	1. Click **Setup**. 2. Expand **Customer**. 3. Click **Customer Policy**.
Provide percent or price level discounts to specific customers	**In Store Manager:** 1. Click **Customer**. 2. Click **Customer**s. 3. Do one of the following: ▪ Click **New** to create a new customer. ▪ Double-click an existing cus-

<table>
<tr><th>I want to...</th><th>To set up, go to...</th></tr>
<tr><td></td><td>tomer.

4. On the Customer Options tab, enter discounts in the following fields:
Price Level
Discount (%)
In POS:

1. Do one of the following: Tap Customer | New Customer to create a new customer. Look up an existing customer, then tap Customer | Edit Customer. 2. On the Options tab, enter discounts in the following fields: Price Level Discount (%)</td></tr>
<tr><td>Enable accounts receivable (store credit)</td><td>Before you can set up accounts receivable (AR) accounts in Store Manager or POS, you must define a Default Account Group.</td></tr>
</table>

I want to...	To set up, go to...
	1. Click **Setup**. 2. Expand **Customer**. 3. Expand **Accounts Receivable**. 4. Click **Accounting Defaults**. 5. Select a **Default Account Group**.
Display customers' accounts receivable information in POS	1. Click **Setup**. 2. Expand **Hardware**. 3. Click **POS Profiles**. 4. Do one of the following: ▪ Click **New** to create a new POS profile. ▪ Double-click an existing POS profile. 5. Select **Separate tab for AR info**. **Note:** Assign the POS profile to the appropriate register(s).

Transaction policies

You will want to define policies for what actions are allowed - and not allowed - in POS.

I want to...	To set up, go to...
Always display the Customer Lookup window	1. Click **File** | **Configuration**. 2. Click **Store Rules**. 3. Expand **Customer Options**. 4. Select **Always display 'Find' window for customers**.
Prompt or require customer selection for transactions	1. Click **File** | **Configuration**. 2. Click **Store Rules**. 3. Expand **Customer Options**. 4. Select one or more of the following: ▪ **Prompt for customer selection** ▪ **Require customer selection for orders** ▪ **Require customer selection for quotes** ▪ **Require customer selection for sales**
Prompt or require sales representative selection for transactions	1. Click **File** | **Configuration**. 2. Click **Store Rules**. 3. Expand **POS Options**.

I want to...	To set up, go to...
	4. Select one or more of the following: ▪ **Prompt for sales representative** ▪ **Require sales representative**
Prompt or require reason codes for discounts, inventory adjustments, no sales, returns, tax changes, drops, etc.	1. Click **File** | **Configuration**. 2. Click **Store Rules**. 3. Expand **Reason Code Options**. 4. Select one or more of the available options.
Prevent or allow cashiers to delete items from transactions	1. Click **Setup**. 2. Expand **People & Security**. 3. Click **Users**. 4. Do one of the following: ▪ Click **New** to create a new user. ▪ Double-click an existing user. 5. On the **General** tab, in **POS User Roles**, select or clear **Allowed to delete entries from transactions**.
Prevent or allow cashiers to change	1. Click **Setup**.

I want to...	To set up, go to...
item or transaction taxes	2. Expand **People & Security**. 3. Click **Users**. 4. Do one of the following: ▪ Click **New** to create a new user. ▪ Double-click an existing user. 5. On the **General** tab, in **POS User Roles**, select or clear **Allowed to change tax status**.
Prevent or allow cashiers to use the Action button in POS **Note: Transaction-related item actions that are available through the Action button include changing item quantities, deleting items, adding sales representatives, changing tax, duplicating items, and adding discounts**	1. Click **Setup**. 2. Expand **People & Security**. 3. Click **Users**. 4. Do one of the following: ▪ Click **New** to create a new user. ▪ Double-click an existing user. 5. On the **Extended Properties** tab, select or clear **Do not allow to access the Action button**.
Prevent or allow cashiers to put transactions on hold	1. Click **Setup**. 2. Expand **People & Security**.

I want to...	To set up, go to...
	3. Click **Users**. 4. Do one of the following: - Click **New** to create a new user. - Double-click an existing user. 5. On the **General** tab, in **POS User Roles**, select or clear **Allowed to put transactions on hold**.
Prevent or allow cashiers to cancel transactions	1. Click **Setup**. 2. Expand **People & Security**. 3. Click **Users**. 4. Do one of the following: - Click **New** to create a new user. - Double-click an existing user. 5. On the **General** tab, in **POS User Roles**, select or clear **Allowed to abort transactions**.
Prevent or allow cashiers to sell to store employees who have dis-counts	1. Click **Setup**. 2. Expand **People & Security**. 3. Click **Users**.

I want to...	To set up, go to...
	4. Do one of the following: ▪ Click **New** to create a new user. ▪ Double-click an existing user. 5. On the **General** tab, in **POS User Roles**, select or clear **Allowed to sell to employees with discounts**.
Set transaction amount limits	1. Click **Setup**. 2. Expand **People & Security**. 3. Click **Users**. 4. Do one of the following: ▪ Click **New** to create a new user. ▪ Double-click an existing user. 5. On the **General** tab, enter a dollar amount in the **Floor Limit** field.
Prevent or allow cashiers to return or void items from a transaction	1. Click **Setup**. 2. Expand **People & Security**. 3. Click **Users**. 4. Do one of the following: ▪ Click **New** to create a new user.

I want to...	To set up, go to...
	■ Double-click an existing user. 5. On the **Extended Properties** tab, select or clear **Do not allow to return or void entries from transaction**.
Set return amount limits	1. Click **Setup**. 2. Expand **People & Security**. 3. Click **Users**. 4. Do one of the following: ■ Click **New** to create a new user. ■ Double-click an existing user. 5. On the **General** tab, enter a dollar amount in the **Return Limit** field.

Inventory policies

You should also consider defining policies regarding what inventory information cashiers and floor sales can look up in POS, and what inventory-related actions are available in POS.

I want to...	To set up, go to...
Display or hide item extended descriptions, notes, or sub-descriptions	1. Click **File** | **Configuration**.

I want to...	To set up, go to...
	2. Click **Store Rules**. 3. Expand **Item Options**. 4. Select or clear: ▪ **Show Item Extended Description** ▪ **Show Item Notes** ▪ **Show Item SubDescription** ▪ **Show previously defined Item SubDescription**
Display or hide out of stock items	1. Click **File** | **Configuration**. 2. Click **Store Rules**. 3. Expand **Item Options**. 4. Select or clear **Display out of stock**.
Prevent or allow the sale of out of stock items	1. Click **File** | **Configuration**.

I want to...	To set up, go to...
	2. Click **Store Rules**. 3. Expand **Item Options**. 4. Select or clear **Do not allow sale of items when out of stock**.
Prevent or allow cashiers to accept the return of out of stock items	1. Click **Setup**. 2. Expand **People & Security**. 3. Click **Users**. 4. Do one of the fol-lowing: ▪ Click **New** to create a new user. ▪ Double-click an existing user. 5. On the **Extended Properties** tab, select or clear**Do not allow to accept out of stock item**.

I want to...	To set up, go to...
Prevent or allow back orders	1. Click **File** | **Con-figuration**. 2. Click **Store Rules**. 3. Expand **POS Options**. 4. Select or clear**Enable back orders**.
Prevent or allow lookup of unknown items	1. Click **File** | **Con-figuration**. 2. Click **Store Rules**. 3. Expand **Item Options**. 4. Select or clear: ▪ **Display unknown item screen** ▪ **Look up unknown items**
Prevent or allow the sale of inactive items	1. Click **File** | **Con-figuration**. 2. Click **Store Rules**.

I want to...	To set up, go to...
	3. Expand **POS Options**. 4. Select or clear **Prevent the sale of inactive items**.
Prevent or allow cashiers to view item cost	1. Click **Setup**. 2. Expand **People & Security**. 3. Click **Users**. 4. Do one of the following: ▪ Click **New** to create a new user. ▪ Double-click an existing user. 5. On the **General** tab, in **POS User Roles**, select or clear**Allowed to view cost information**.
Prevent or allow cashiers to edit item cost	1. Click **File** | **Configuration**.

I want to...	To set up, go to...
	2. Click **Store Rules**. 3. Expand **Item Options**. 4. Select or clear **Do not allow edit of item cost**.
Prevent or allow cashiers to access pricing information	1. Click **Setup**. 2. Expand **People & Security**. 3. Click **Users**. 4. Do one of the following: ▪ Click **New** to create a new user. ▪ Double-click an existing user. 5. On the **General** tab, in **POS User Roles**, select or clear **Allowed to access pricing**.

I want to...	To set up, go to...
Prevent or allow cashiers to use the Action button in POS **Note: Inventory-related item actions that are available through the Action button include changing the item price, extended price, and description.**	1. Click **Setup**. 2. Expand **People & Security**. 3. Click **Users**. 4. Do one of the following: ▪ Click **New** to create a new user. ▪ Double-click an existing user. 5. On the **Extended Properties** tab, select or clear **Do not allow to access the Action button**.
Prevent or allow cashiers to edit item description	1. Click **Setup**. 2. Expand **People & Security**. 3. Click **Users**. 4. Do one of the following:

I want to...	To set up, go to...
	■ Click **New** to create a new user. ■ Double-click an existing user. 5. On the **Extended Properties** tab, select or clear **Allowed to edit Item Description**.
Prevent or allow serial numbers to be created (entered) in POS	1. Click **File | Configuration**. 2. Click **Store Rules**. 3. Expand **Serial Number Options**. 4. Select or clear **Allow POS serial number creation**.
Require unique serial numbers in POS	1. Click **File | Configuration**. 2. Click **Store Rules**. 3. Expand **Serial Number Options**.

I want to...	To set up, go to...
	4. Select **Enforce unique serial numbers**.
Enable random weight EAN and UPC codes	1. Click **File** | **Configuration**. 2. Click **Store Rules**. 3. Expand **POS Options**. 4. Select one or more of the following options: ▪ **Utilize random weight EAN codes** ▪ **Utilize random weight UPC codes**

Customizing the POS screen and display

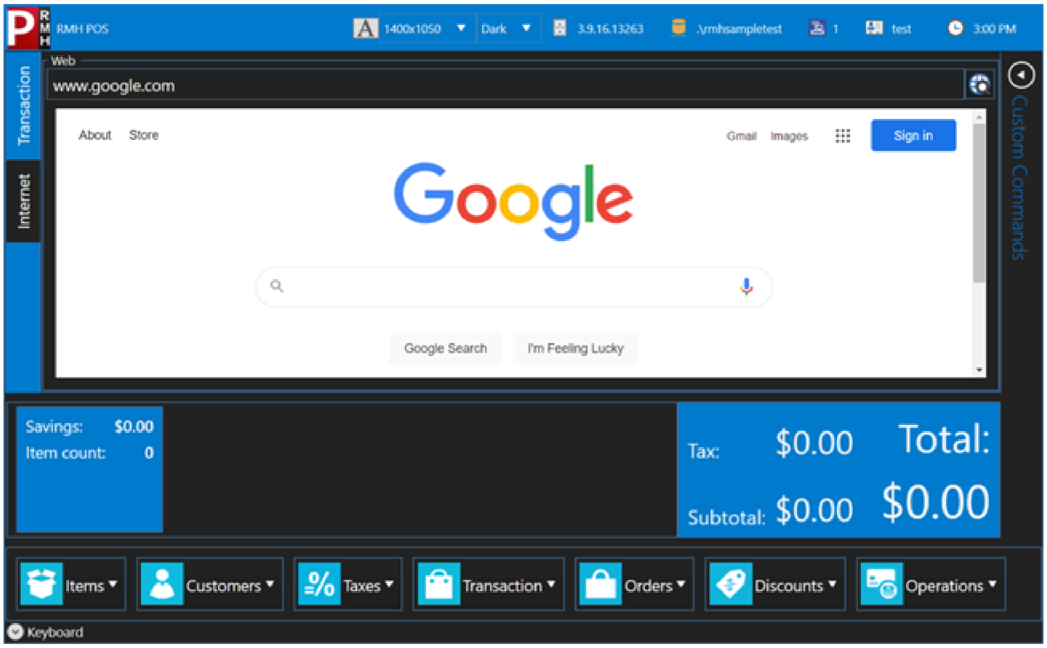
About POS profiles

POS profiles control specific aspects of the POS display and behavior.

Some of the things that POS profiles control include:

- How long a POS lane can be idle before the user is automatically logged off;
- The maximum number of rows to display, e.g., when you search for an item;

- Whether to display a details row for each item;
- Whether to display an integrated web browser in POS;



- Whether to enable integrated payment;
- Whether to display Weights and Measures information on the POS login screen, and the number of decimal digits to use in measurements.

> **Note:** POS profiles are defined in Store Manager in **Setup** | **Hardware** | **POS Profiles**. You can assign a POS profile to a specific POS lane in Store Manager in **Setup** | **Hardware** | **Register List**.

Activating the Internet tab

Stores have the option to activate the **Internet** tab, located to the left of the POS window, and set a default web site such as 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.

Activating the Internet tab is a two-step process:

1. Enable the Internet tab in POS profile(s).

2. Assign the POS profile(s) to the register(s).

To enable the Internet tab in a POS profile:

1. In Store Manager, click **Setup**.

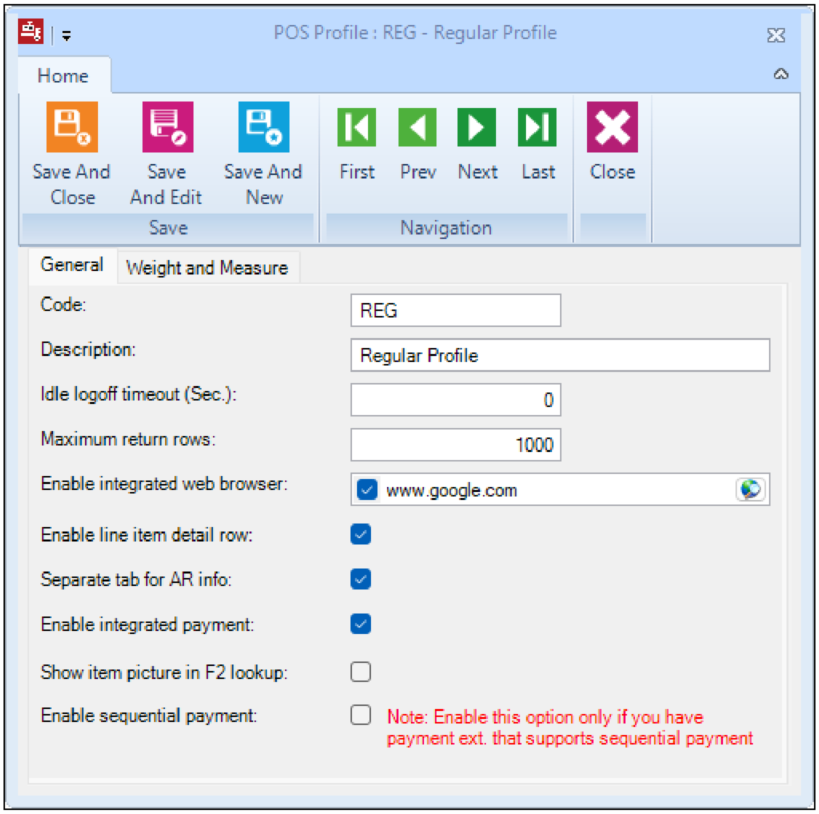
2. Expand **Hardware**.

3. Click **POS Profiles**.

4. Do one of the following:

   - Double-click an existing POS profile to open and edit it; or
   - Click **New** and create a new POS profile.

5. Select **Enable integrated web browser** and either type or paste the web site URL into the field.



6. Click the **Preview** icon to test the web site URL. (If you entered it correctly, the web site will open in a tab in your web browser.)

7. Click **Save And Close**.

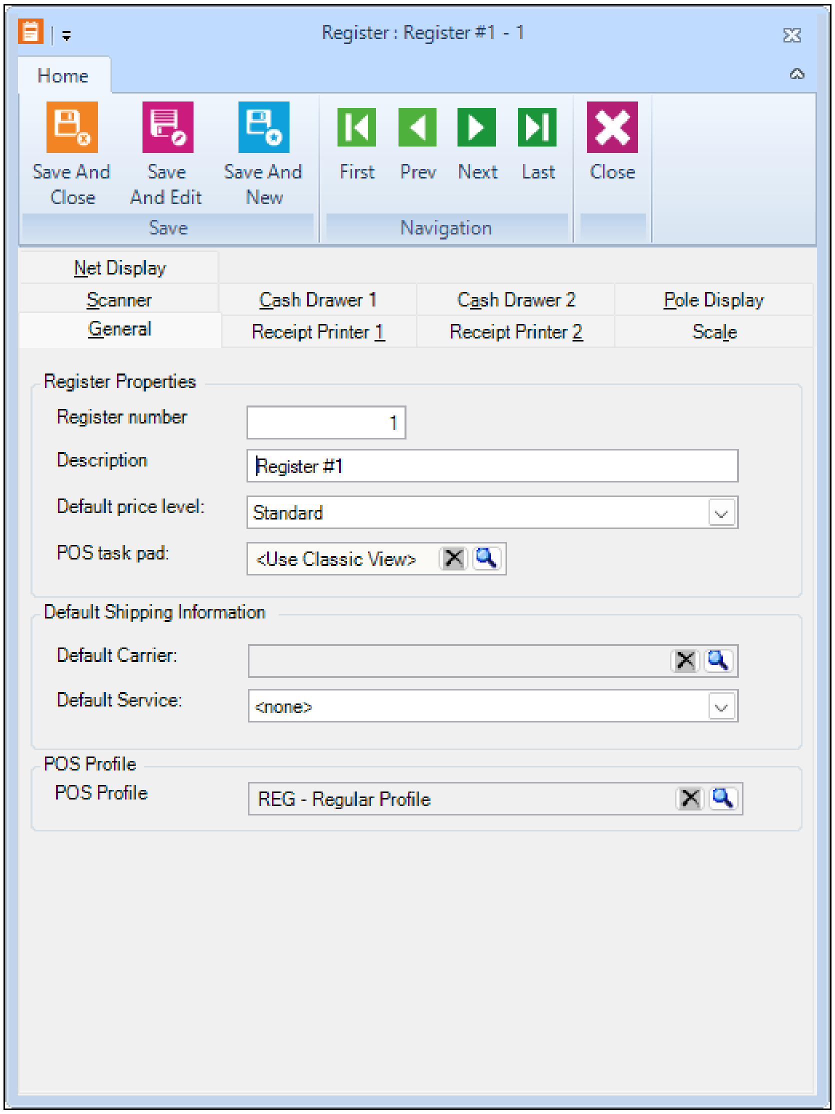
To assign the POS Profile to a register:

1. Under **Setup** | **Hardware**, click **Register List**.

2. Do one of the following:

   - Double-click an existing register to open and edit it; or
   - Click **New** and create a new register.

3. On the **General** tab, from **POS Profile**, select the POS profile with the enabled integrated web site.



4. Click **Save And Close**. The integrated web site it now enabled for all registers using the POS profile.

Setting up pole display messages

Stores that have electronic pole displays connected to their registers can set up different messages to show on the pole display screens. Setting up pole display messages is a two-step process:

1. Set up the pole display message(s). Each message can contain up to two lines of text.

2. Enable pole display for the register(s) and select the pole display message(s).

To add pole display messages at POS registers:

1. Click **Setup**.

2. Expand **Hardware**.

3. Click **Pole Display Messages**.

4. Do one of the following:

   - Double-click an existing pole display message to open and edit it; or
   - Click **New** and create a new pole display message.

5. In the **Message Description**, enter a name for the pole display message such as Loyalty Message. This name is used to select which pole display message to display when you set up the register.

6. For either **Line 1** or **Line 2**:

   a. Enter the **Message** that you want to display in the line. Leave the Message blank if you want to display the date and time in the line.

      > **Note:** The best practice is to limit the message to 100 characters.

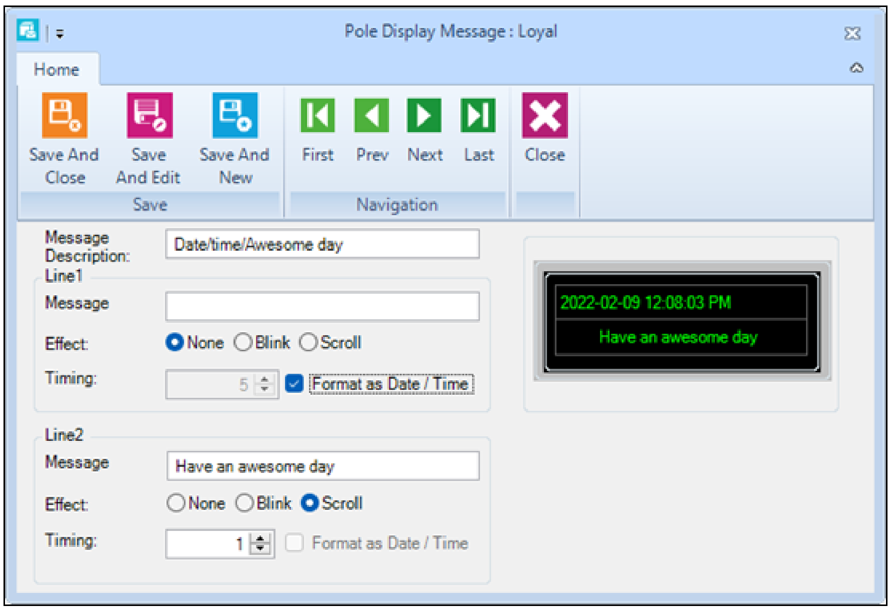
   b. For **Effect**, select **None**, **Blink**, or **Scroll**.

      > **Note:** You can only select one effect per message. If you select None, the message remains stationary on the pole display and if the message exceeds the display limit it will be truncated.

c. Use **Timing** to control the speed of the Blink or Scroll effect. The lower the number, the faster the speed.

d. If you want to display the date and time in the line, ensure the Message field is blank ad select **Format as Date / Time**.

7. Check the preview to confirm that the messages and effects are set up to your satisfaction.



8. Click **Save And Close**.

9. Under **Setup** | **Hardware**, click **Register List**.

10. Do one of the following:

- Double-click an existing register to open and edit it; or
- Click **New** and create a new register.

11. On the **Pole Display** tab, select **Pole display is enabled for this register**.

12. From **OPOS device name**, enter the name of the pole display device.

13. For **Pole display message**, click the **Search** icon, select the appropriate pole display message, and click **OK**.

14. Click **Save And Close**. The pole display message is now enabled for the register.

Setting up net display channels

Stores that have an second monitor connected to their registers can use net display channels to web sites, item pictures, and receipts on the second monitor. Setting up net display channels is a two-step process:

1. Set up the net display channel(s).

2. Enable net display for the register(s) and select the net display channel(s).

> **Pre-requisites:** To use net display channels you must have two monitors connected to the register, and the computer must be configured to extend the display to the second monitor. If you want to display web sites on the second monitor the computer must have access to the Internet.

To set up net display channels at POS registers:

1. Click **Setup**.

2. Expand **Hardware**.

3. Click **Net Display Channels**.

4. Do one of the following:

   - Double-click an existing net display channel to open and edit it; or
   - Click **New** and create a new net display channel.

5. For new net display channels, in the **Channel Name** field, enter a name for the channel.

6. To add a web site to the net display channel:

   a. Click **New**.

   b. In the **URL** field, type or paste the web address, such as http://rmhpos.com.

   c. Select the URL and click **Preview** to confirm that the web address is correct.

   d. In the **Seconds** field, enter the number of seconds the web site should display.

7. Repeat the previous step to add more web sites, if desired. To change the order in which the web sites are displayed, select a web site and move it up or down in the list using the **Move Up** or **Move Down** buttons.

8. If you added pictures for most items in your store (in Merchandising | Items | Special), select **Display each item's picture as it is rung up** to display those pictures on the second monitor.

9. Click **Save And Close**.

10. Under **Setup** | **Hardware**, click **Register List**.

11. Do one of the following:

    - Double-click an existing register to open and edit it; or
    - Click **New** and create a new register.

12. On the **Net Display** tab, select **Net display is enabled for this register**.

13. For **Net display channel**, click the **Search** icon, select the appropriate net display channel, and click **OK**.

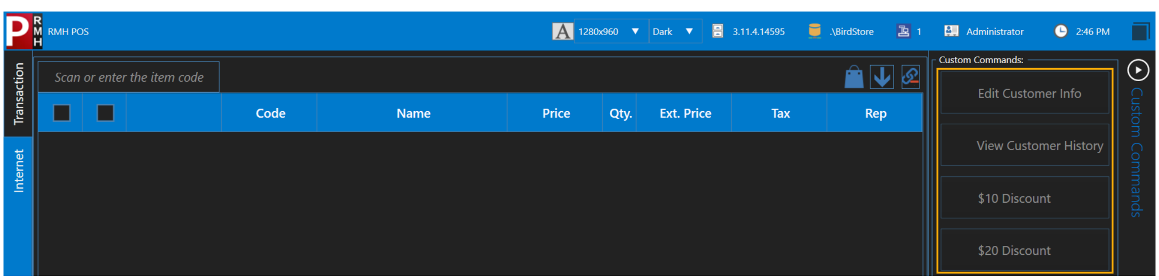
14. To display receipts on the second monitor, select **Show receipt on Net Display** and then select the placement of the receipt on the monitor:

    - Left
    - Right
    - Bottom
    - Top

15. Click **Save And Close**. The net display channel is now enabled for the register.

Setting up custom POS buttons

Stores have the option to set up custom buttons in POS for common tasks, such as applying dollar or percent off discounts or tendering common cash denominations such as 20s, 50s, or 100s. Custom POS buttons display in the **Custom Commands** pane to the right of the POS window:



> **Note:** Custom POS buttons display in the Custom Commands pane only if there is no task pad assigned to the register. If there is a task pad assigned to the register or user, the task pad displays in the Custom Commands pane in POS instead of the custom buttons. To save space in the POS screen, click the arrow to hide the Custom Commands pane when it is not in use.

To configure custom buttons for POS:

1. Identify the commands that contain the functionality you want to program into the button. Refer to the Commands reference guide for more information.
2. In Store Manager, click **Setup**.
3. Expand **Hardware**.
4. Click **Custom POS Buttons**.
5. Click **New**.
6. For **Number**, enter a number representing the order in which the button should display in the **Custom Commands** pane, with 1 displaying at the top of the pane.
7. From **Style**, select **Internal Command**.
8. For **Caption**, enter the text that you would like to display on the button label, e.g., $10 Discount.
9. If desired, click **Load Image**, select an image to display on the button to the left of the button label, and click **Open**.
10. In the **Command** field, enter the command (or chain of commands) and any relevant command parameters.

    Starting with release 3.11.0 you can program Task Pads or Custom Buttons to execute a chain of commands when the button is clicked by adding a semicolon (;) between commands. For example, you might create a chain of commands to discount a transaction (command 1) and then automatically select a discount reason code (command 2). There is no limit to the number of commands in a chain.

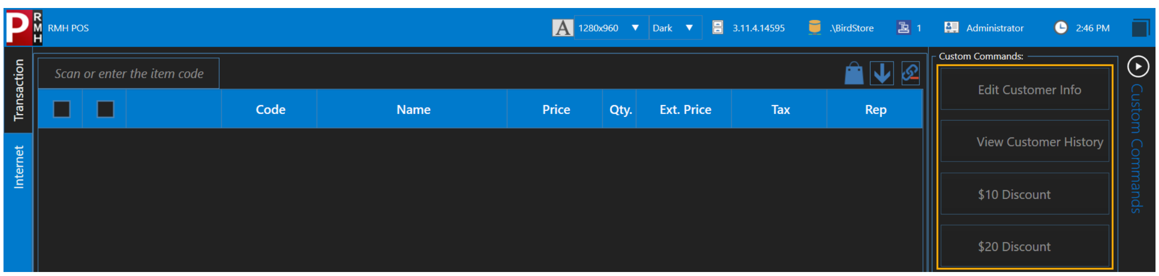
However, the commands should be chained together to follow a logical transaction process.

11. If desired, enter a **Description** of the command. This description does not display in POS. It is for reference only within Store Manager.

12. Click **Save And Close**.

Setting up custom POS task pads

Stores have the option to set up task pads with custom buttons in POS for common tasks, such as looking up items. Task pad buttons display in the **Custom Commands** pane to the right of the POS window:



> **Note:** It is also possible to configure custom POS buttons that display in the Custom Commands pane. Custom POS buttons only display if there is no task pad assigned to the register or user. If there is a task pad assigned to the register, the task pad displays in the Custom Commands pane instead of the custom POS buttons.

To configure task pads for POS:

1. Identify the commands that contain the functionality you want to program into the task pad buttons. Refer to the Commands reference guide for more information.

2. In Store Manager, click **Setup**.

3. Expand **Hardware**.

4. Click **POS Task Pads**.

5. Click **New**.

6. Enter a **Name** for the task pad.

7. From **Layout**, select a button layout for the task pad.

8. Click a button in the **Preview**.

9. From **Button Type**, select one of the following:

   - **Command:** Select this option if you want to configure the button to execute a command or chain of commands.
   - **Task Pad:** Select this option if you want to configure the button to launch a task pad. For example, if you run a convenience store and you use touch-screen monitors in POS lanes, you might want to set up task pads for different types of items like soft drinks, snacks, sandwiches, milk, and so on to make it easier to add items to transactions.

10. If you selected **Command**, in the **Command** field, enter the command (or chain of commands) and any relevant command parameters.

    Starting with release 3.11.0 you can program Task Pads or Custom Buttons to execute a chain of commands when the button is clicked by adding a semicolon (;) between commands. For example, you might create a chain of commands to discount a transaction (command 1) and then automatically select a discount reason code (command 2). There is no limit to the number of commands in a chain. However, the commands should be chained together to follow a logical transaction process.

11. If you selected **Task Pad**, click the **Browse** icon next to **Task Pad Name**, select the task pad that you want to launch from the button, and click **OK**.

12. If desired, select a custom color for the button. To do this, click the **Browse** icon next to **Button Color**, select the button color, and click **OK**.

13. For **Caption**, enter the text that you would like to display on the button label, e.g., $10 Discount.

14. If desired, select a custom color for the font. To do this, click the **Browse** icon next to **Font Color**, select the button color, and click **OK**.

15. If desired, select an image to display on the button to the left of the button label. To do this, click the **Browse** icon next to **Image**, select the image, and click **Open**.

16. Click **Save And Close**.

17. Do one of the following:

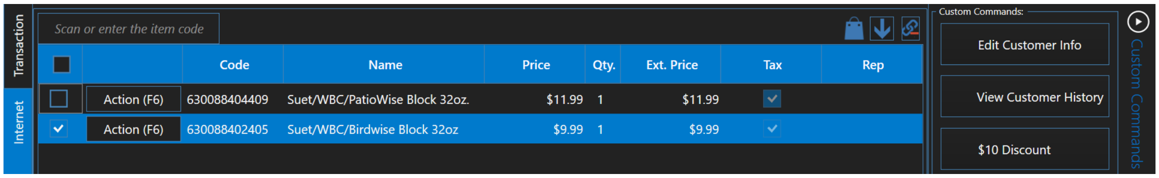
    - Assign the task pad to a specific user; or
    - Assign the task pad to a specific register or user.

    Refer to "Setting up a user account" and "Setting up registers" in the Store Manager User Guide for more information.

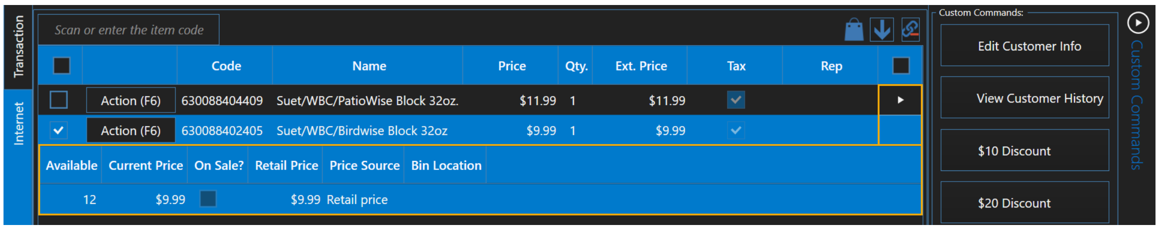
Enabling line item details in transaction lists

Stores have the option to enable line item details in transaction lists. The line item details offer more information about an item, such as the quantity available in the store, the current price, whether the item is on sale, and the bin location.

If line item details are not enabled, you can only see a summary line for each item in the transaction list:



If line item details are enabled, however, an arrow displays on the summary line. Click this arrow to display the item details line below the summary line:



Enabling line item details is a two-step process:

1. Enable line item details in the POS Profile.

2. Assign the POS Profile to the register(s).

To enable line item details in the POS Profile:

1. In Store Manager, click **Setup**.

2. Expand **Hardware**.

3. Click **POS Profiles**.

4. Do one of the following:

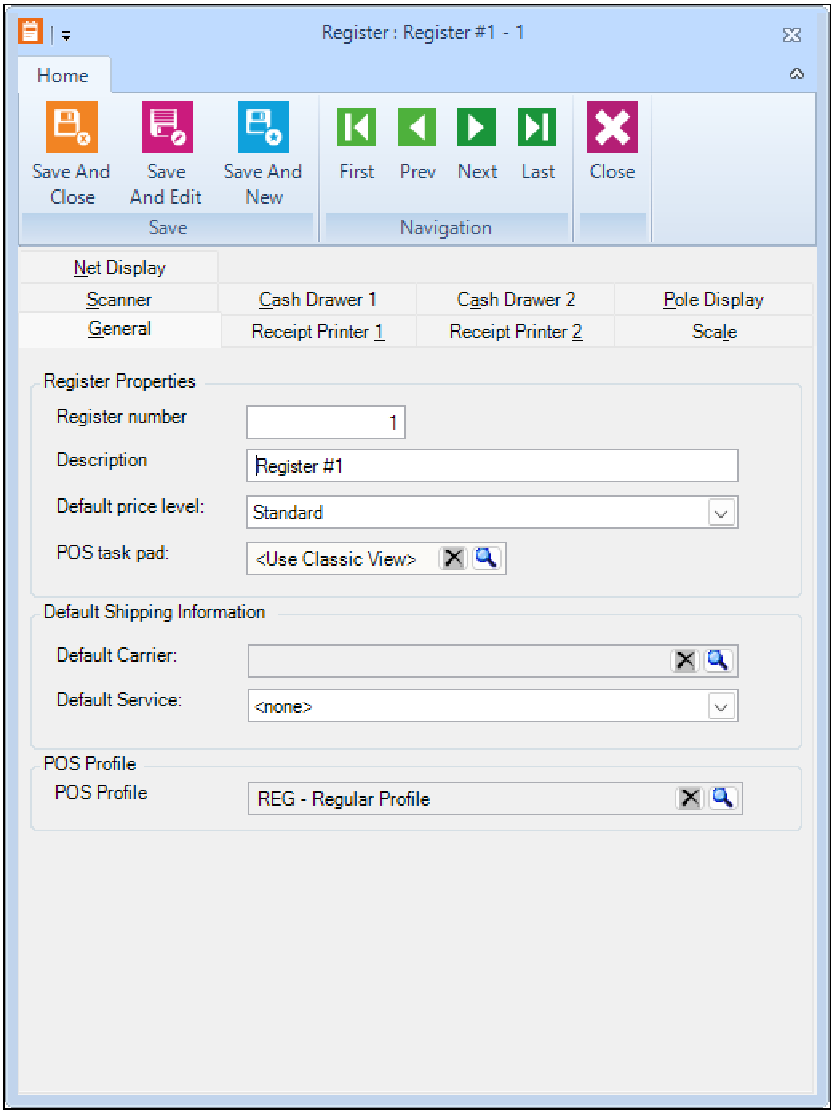
   - Double-click an existing POS profile to open and edit it; or
   - Click **New** and create a new POS profile.

5. Select **Enable line item detail row**.

6. Click **Save And Close**.

To assign the POS Profile to the register(s):

1. In Store Manager, click **Setup**.
2. Expand **Hardware**.
3. Click **Register List**.
4. Do one of the following:
   - Double-click an existing register to open and edit it; or
   - Click **New** and create a new register.
5. On the **General** tab, from **POS Profile**, select the POS profile with line item details enabled.



6. Click **Save And Close**. Line item details are now enabled for the register(s) using the POS profile.

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.

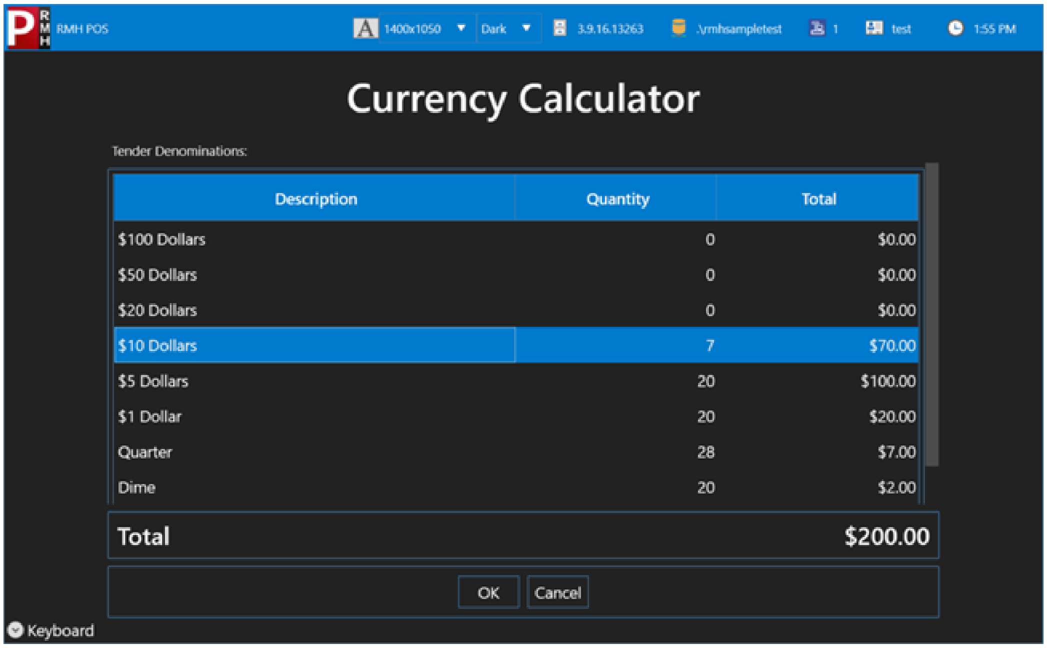
3. In POS, tap **Operations** | **Batch** | **Enter Opening Amounts**.

    > **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.

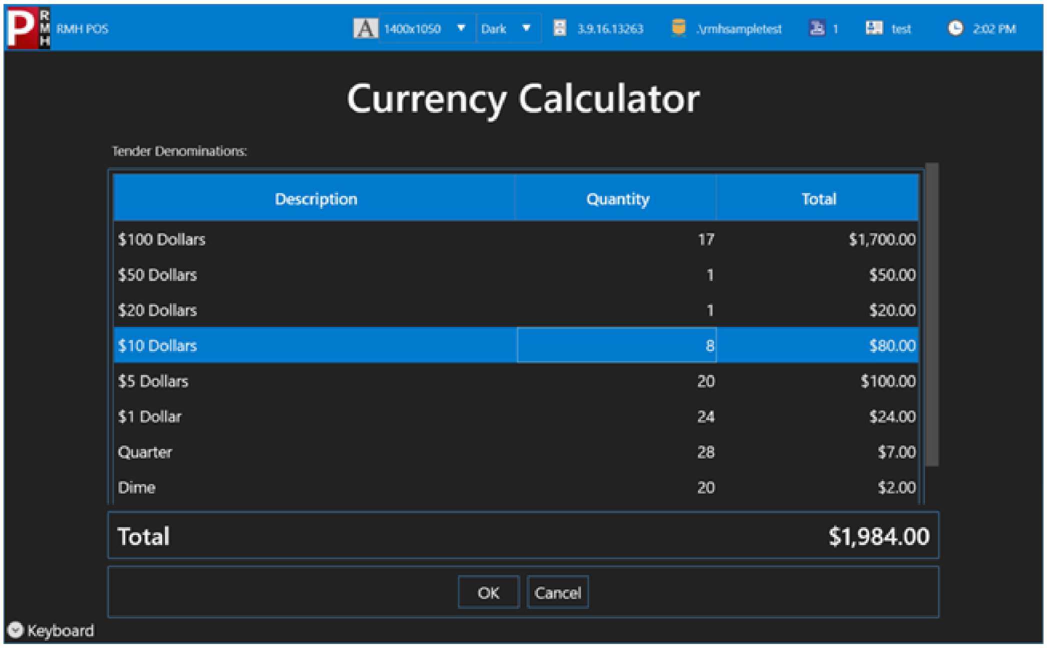
5. Follow your store's procedures for counting your cash drawer, entering closing cash amounts, and generating X reports and Z reports.

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.

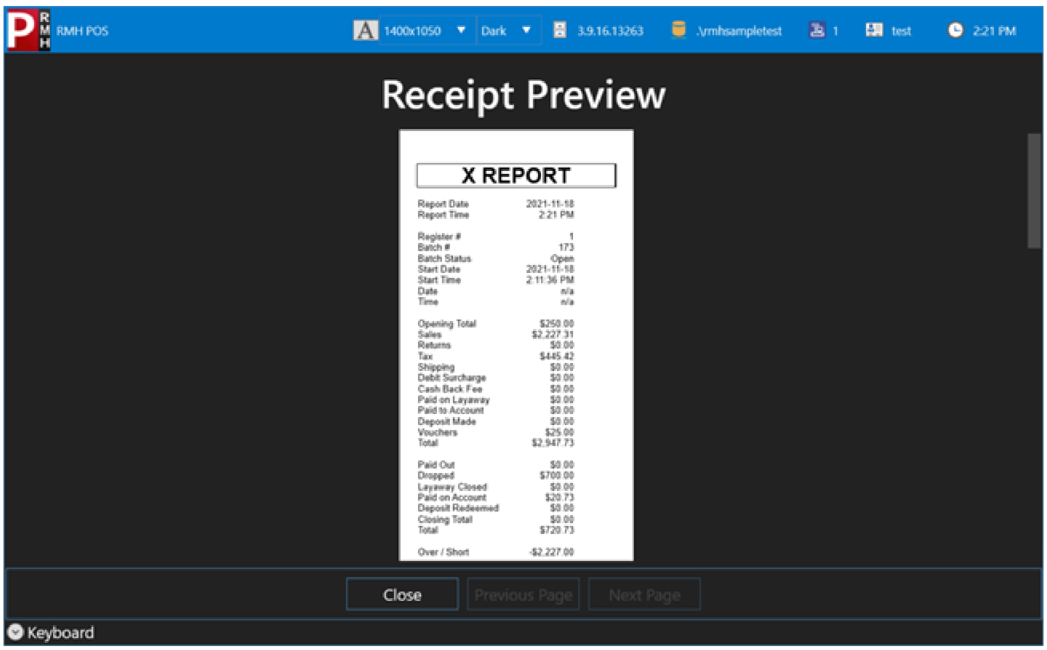
Pre-requisites: You must have the **Allowed to generate X Reports** and **Allowed to generate Z & ZZ Reports** permissions to generate reports in POS.

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.

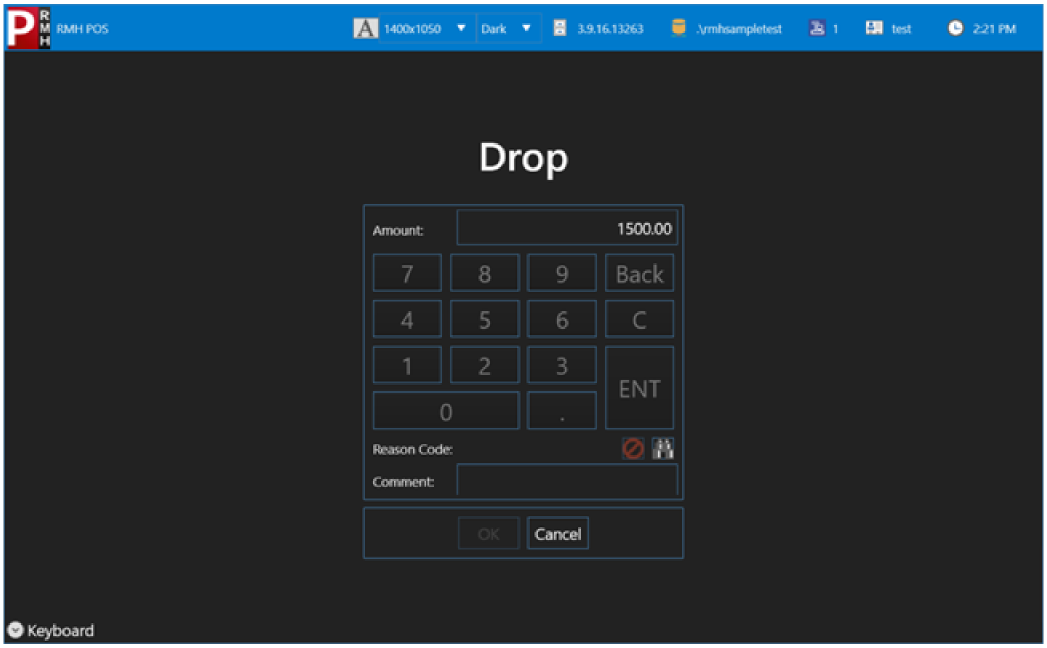
Managing the cash drawer

Performing cash drops

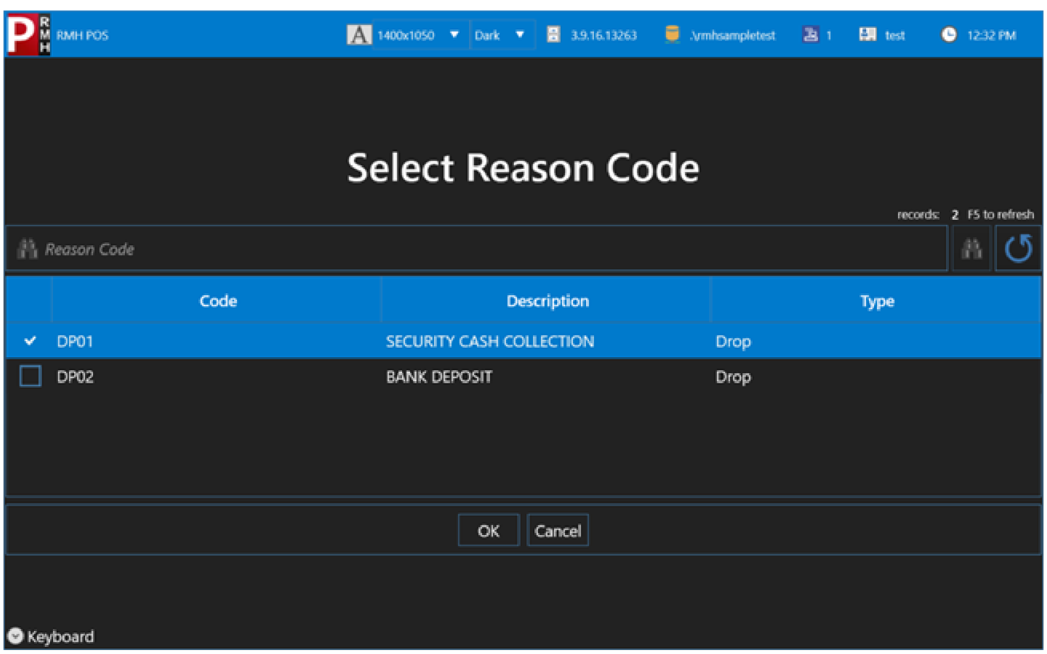
You should skim excess cash from your cash drawer throughout your shift and perform cash drops to the store safe or another secure location. This reduces the store's risk of theft. When you perform a cash drop, the amount is included in your total sales for the day and will display on your Z report.

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

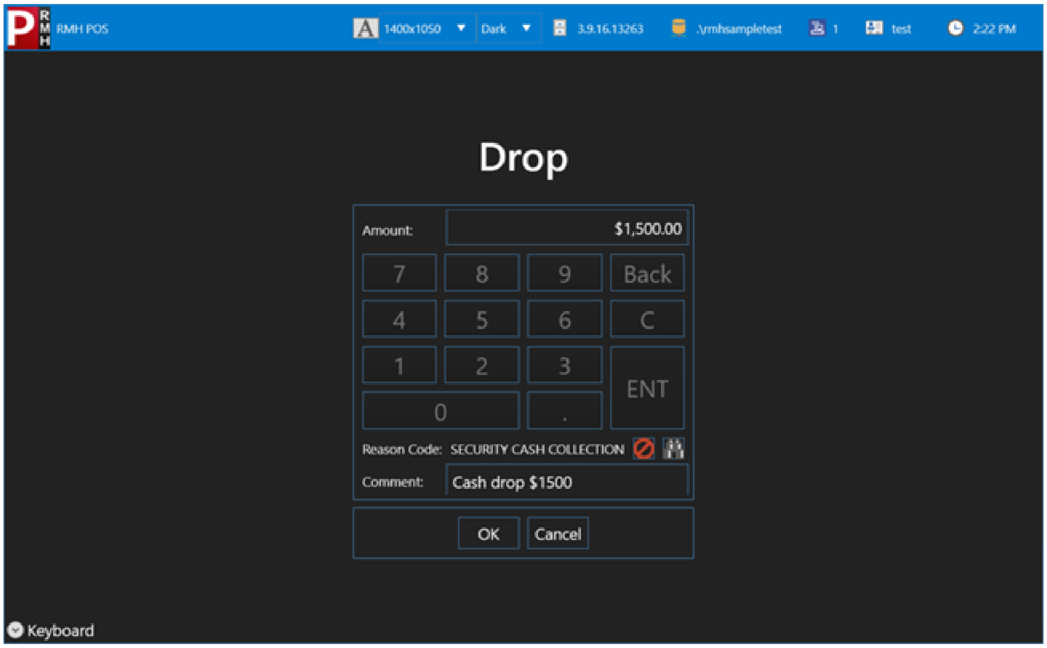
1. Tap **Operations** | **Cash** | **Cash drop**.
2. Tap in the **Amount** field and enter the total amount that you want to drop, e.g., $1500.



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.

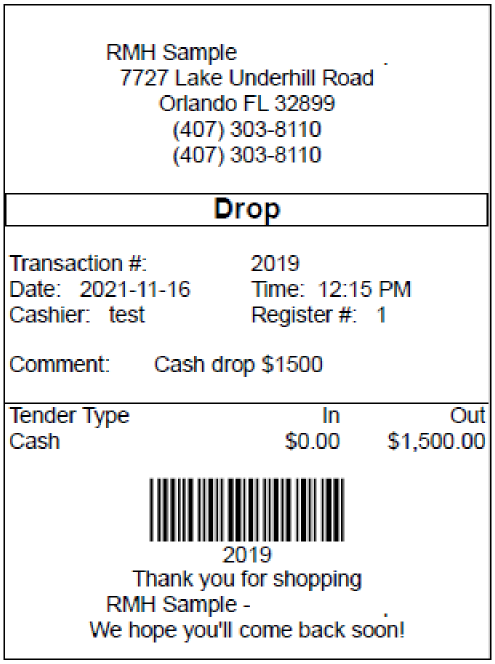


5. Tap **OK**.

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.

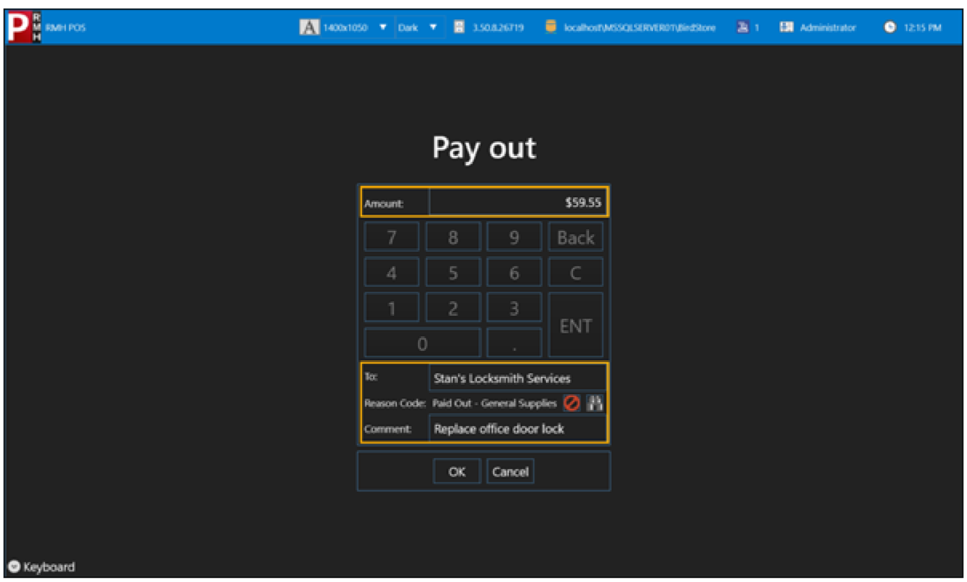
Performing payouts

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

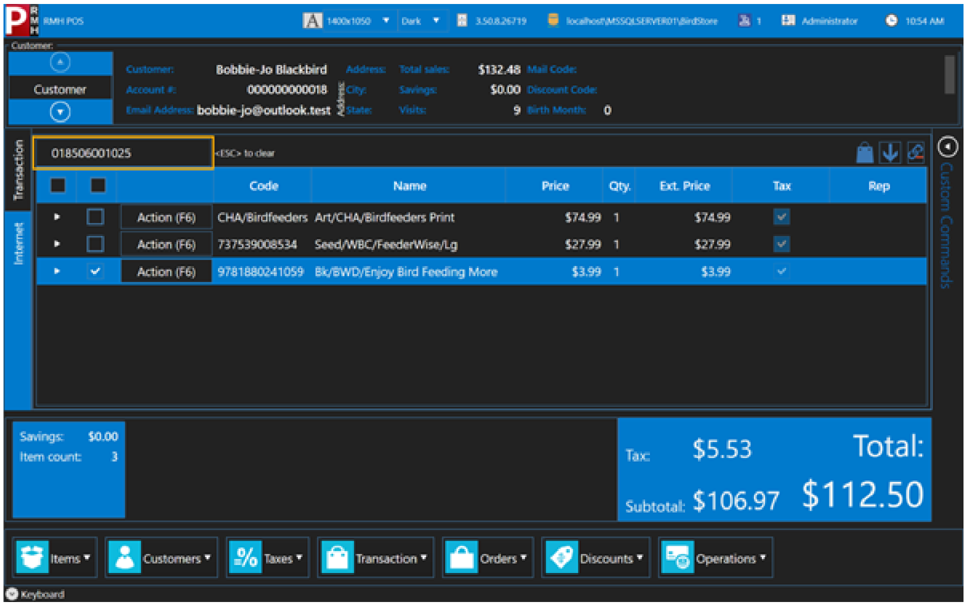
2
Thank you for shopping
Demo Store - Bird
We hope you'll come back soon!

Processing transactions

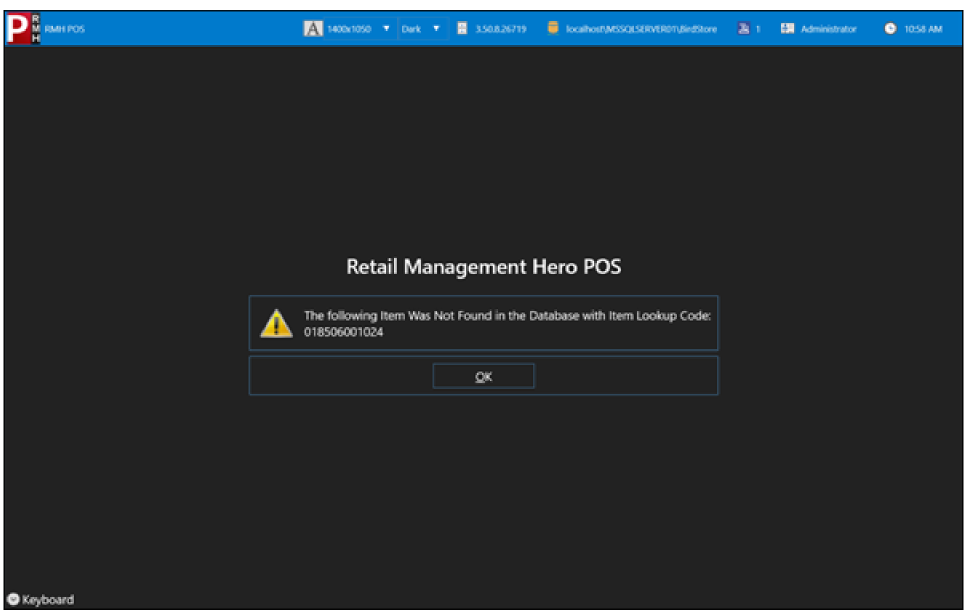
Adding items to transactions

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

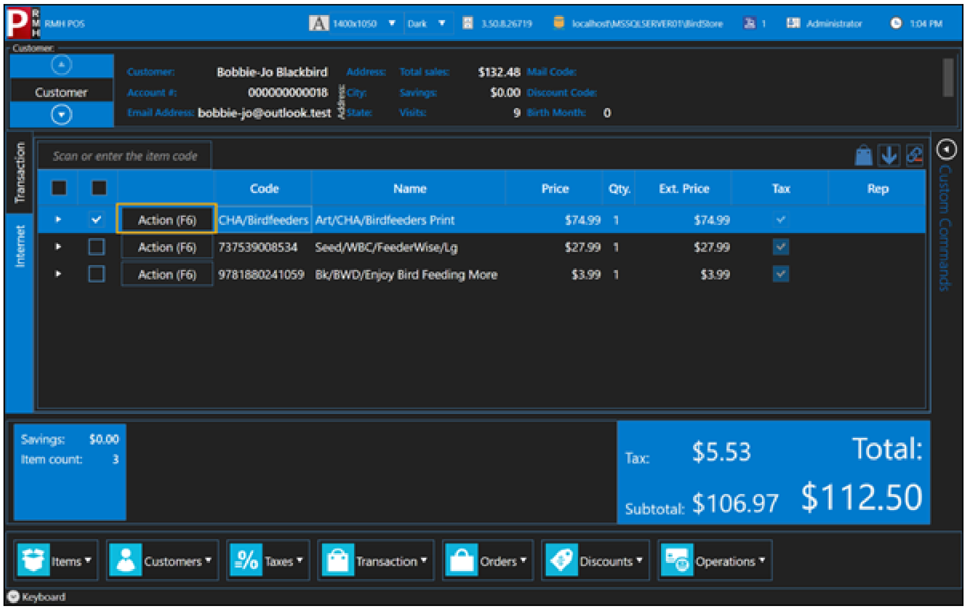
Once you have mastered adding items to transactions, you will want to learn how to perform common tasks such as:

- 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.

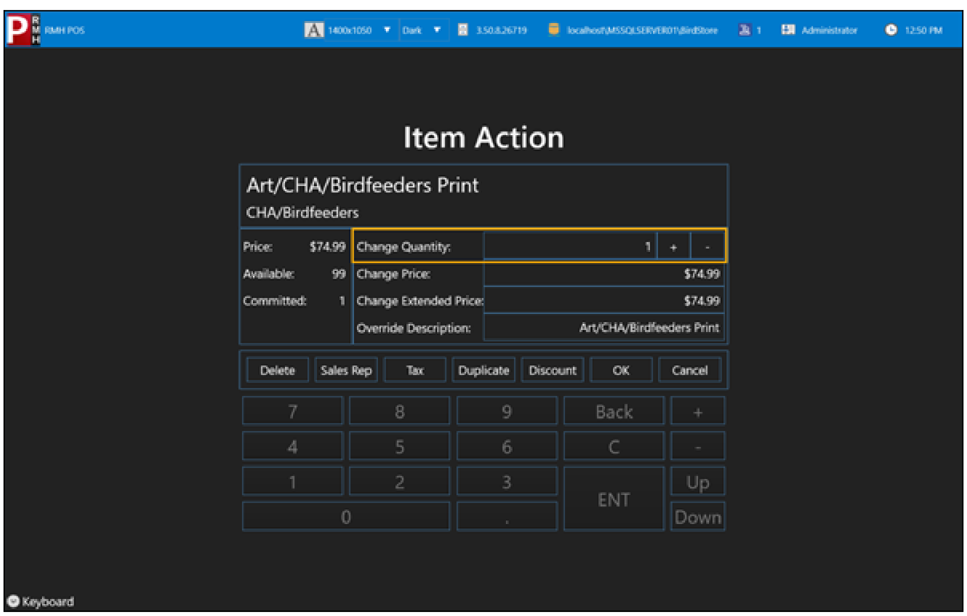
Changing the item quantity

1. Tap the **Action** button beside the item.



2. On the **Item Action** screen, do one of the following:

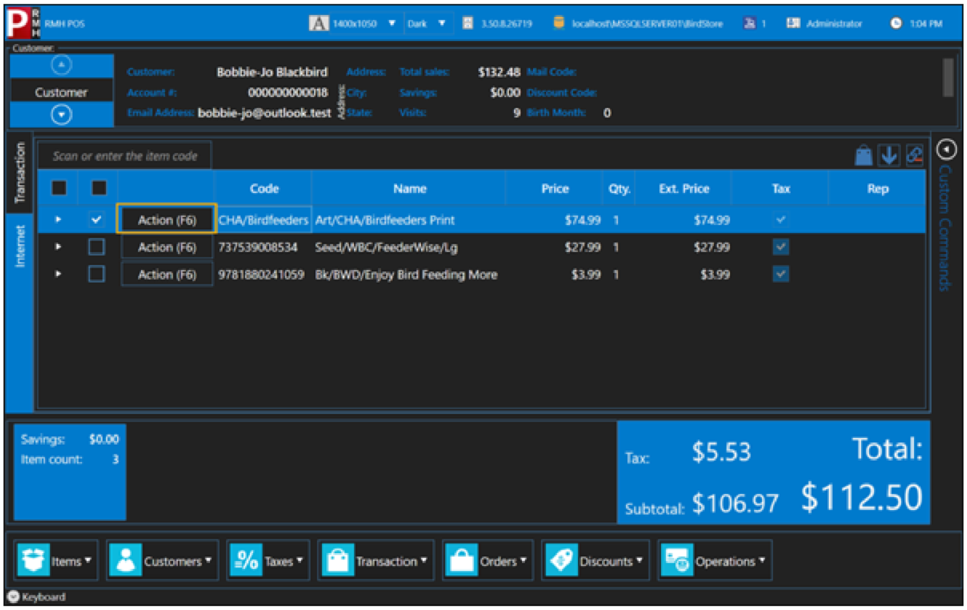
- Tap the **+** or **-** buttons until the correct item quantity displays.
- Manually enter the correct item quantity.



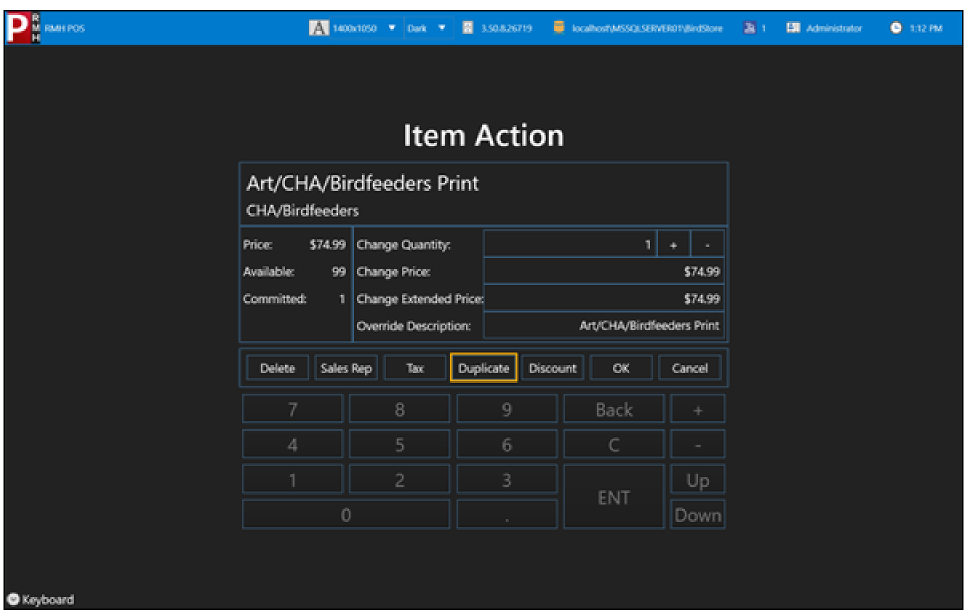
3. Tap **OK**.

Duplicating items

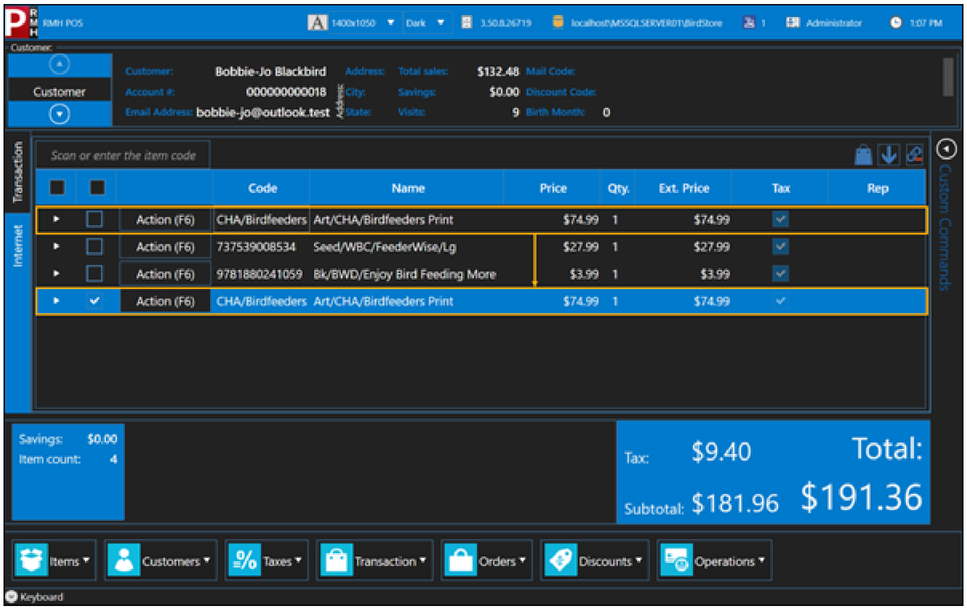
1. Tap the **Action** button beside the item.



2. On the **Item Action** screen, tap **Duplicate**.



3. Tap **OK**. The duplicate item is added to the transaction screen.

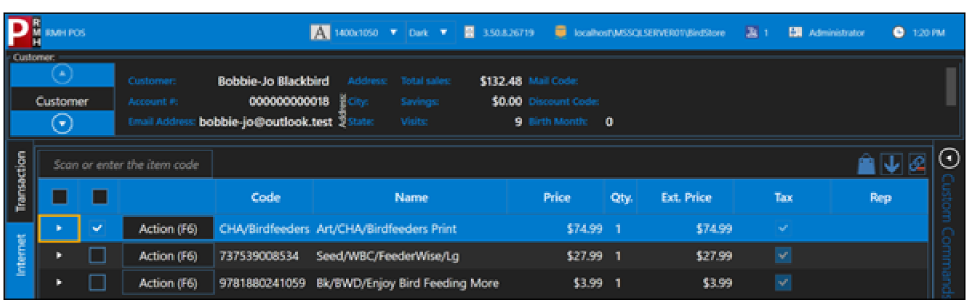


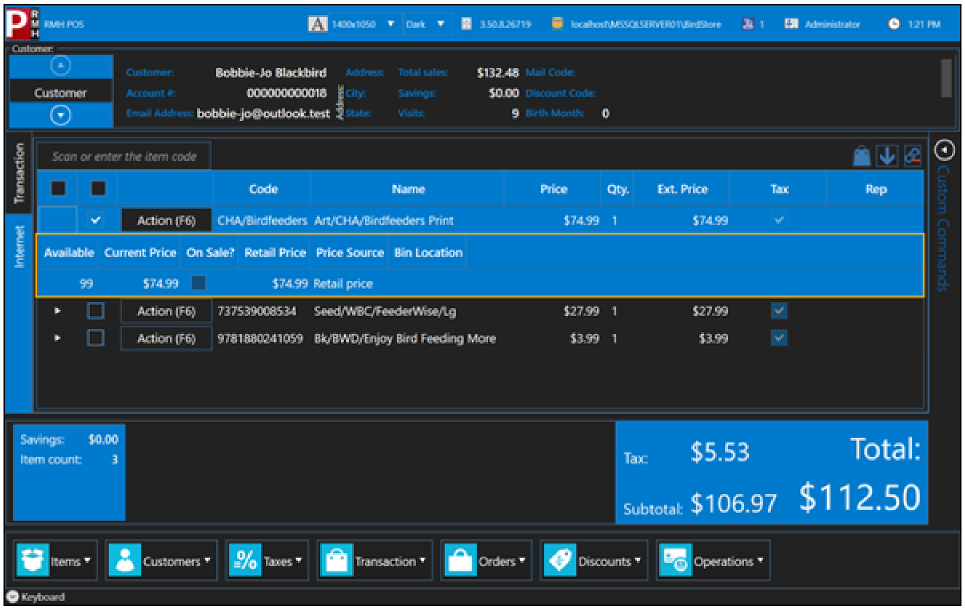
Looking up item availability and pricing

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.

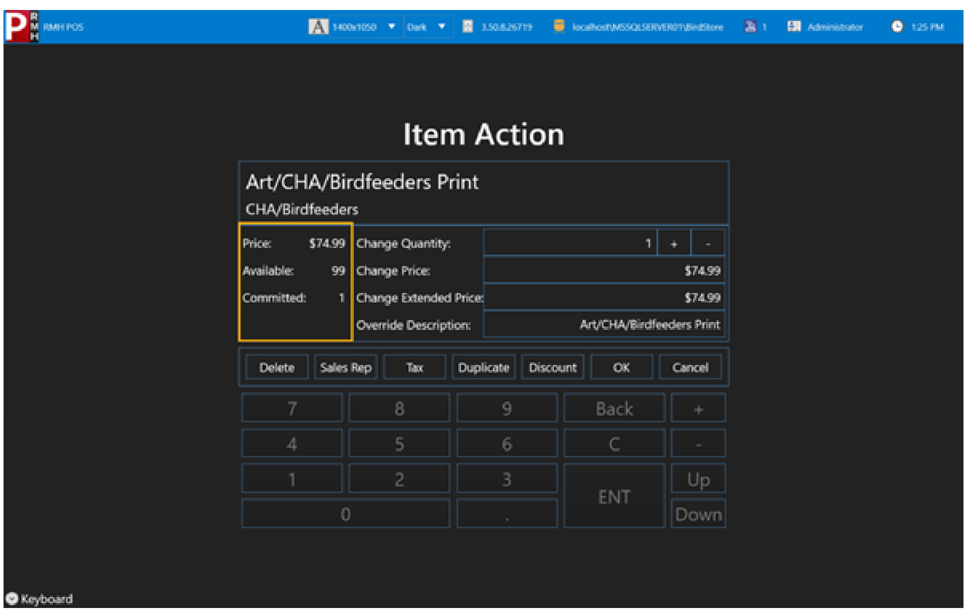
> **Pre-requisites:** The **Enable line item detail row** option must be enabled in the **POS Profile** connected to the register to see the line item details row.

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.



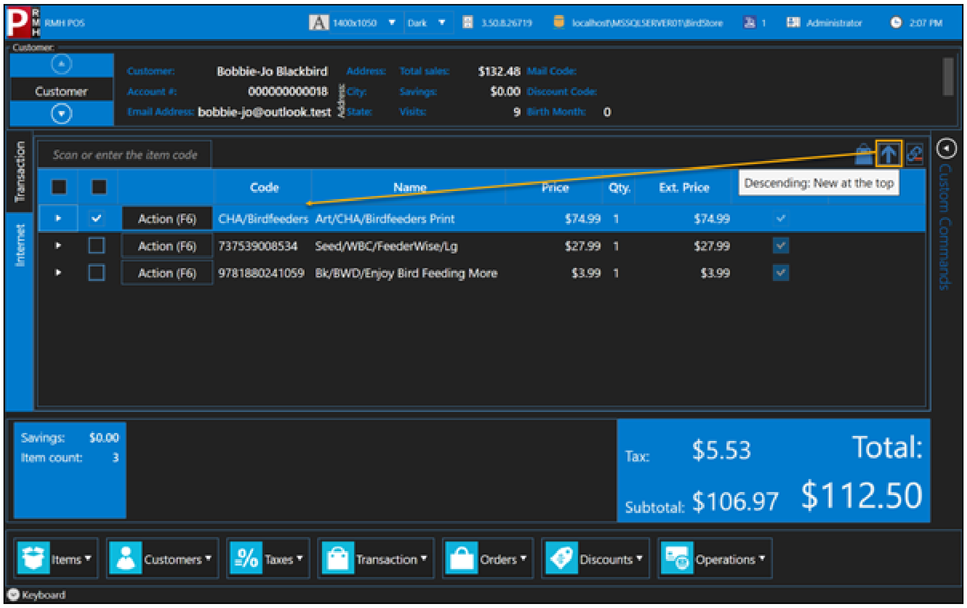


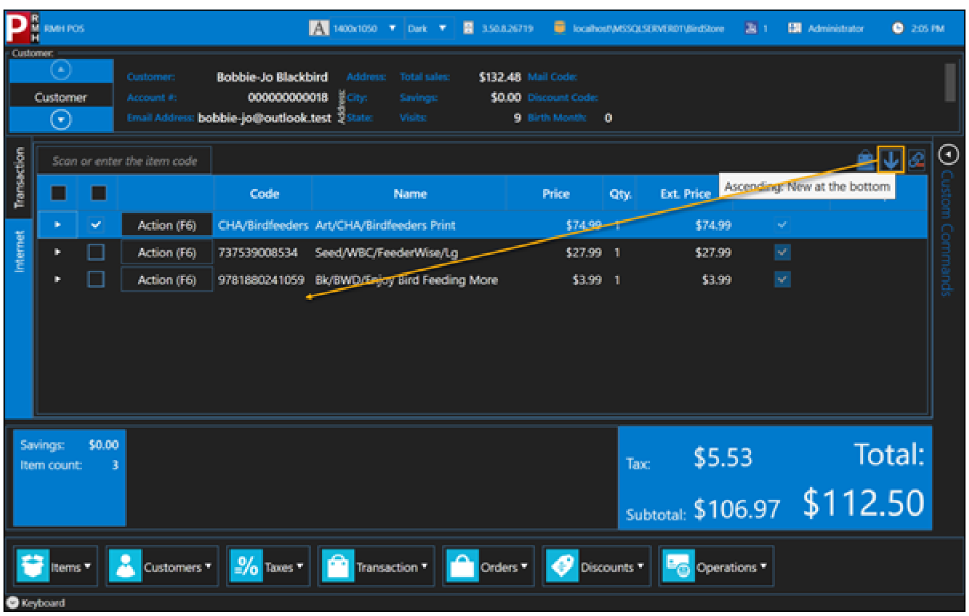
Option 2: If line item details are not enabled for your register, tap the **Action** button beside the item. You can see availability and pricing information on the **Item Action** screen.



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.

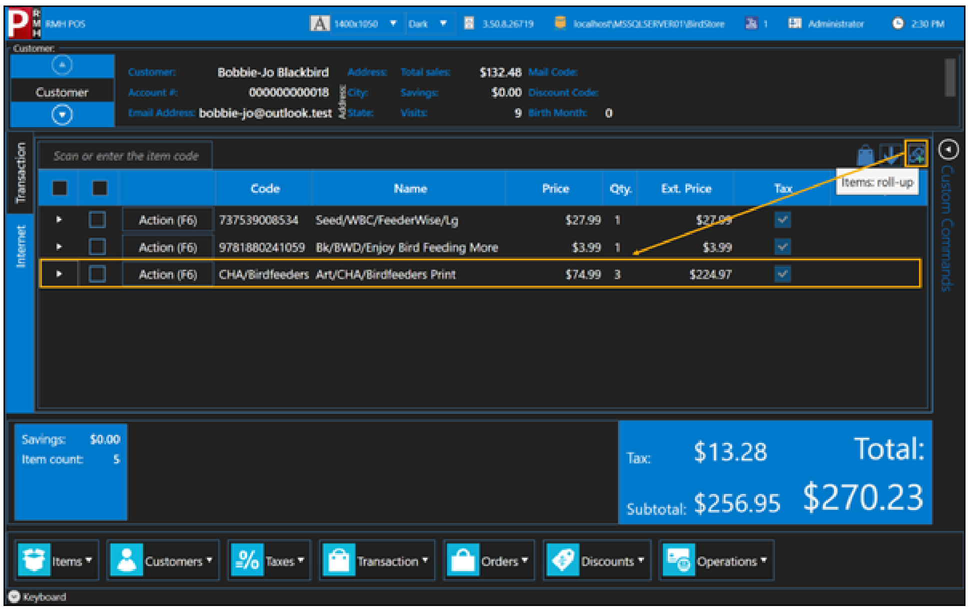


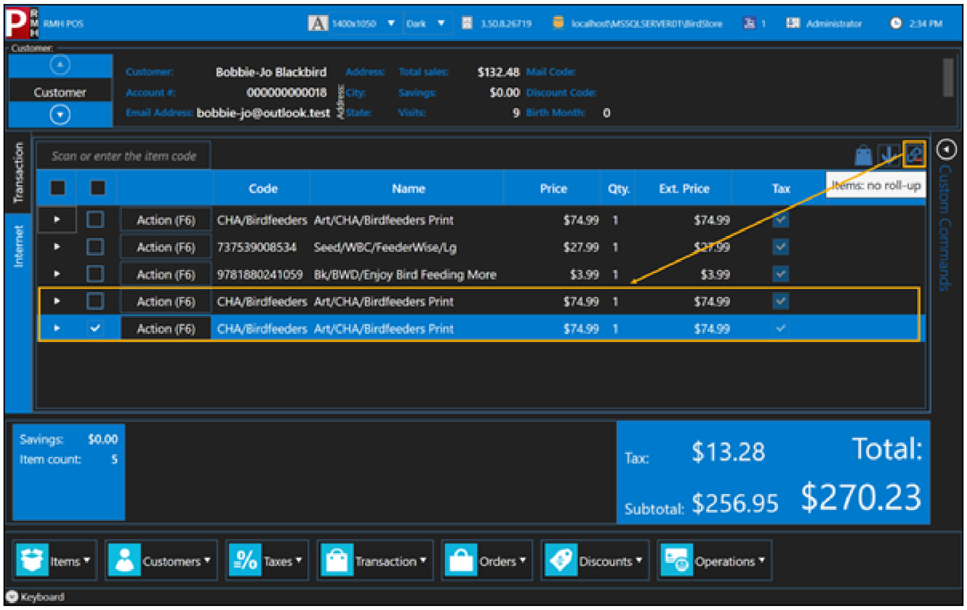


Turning item roll up on an off

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

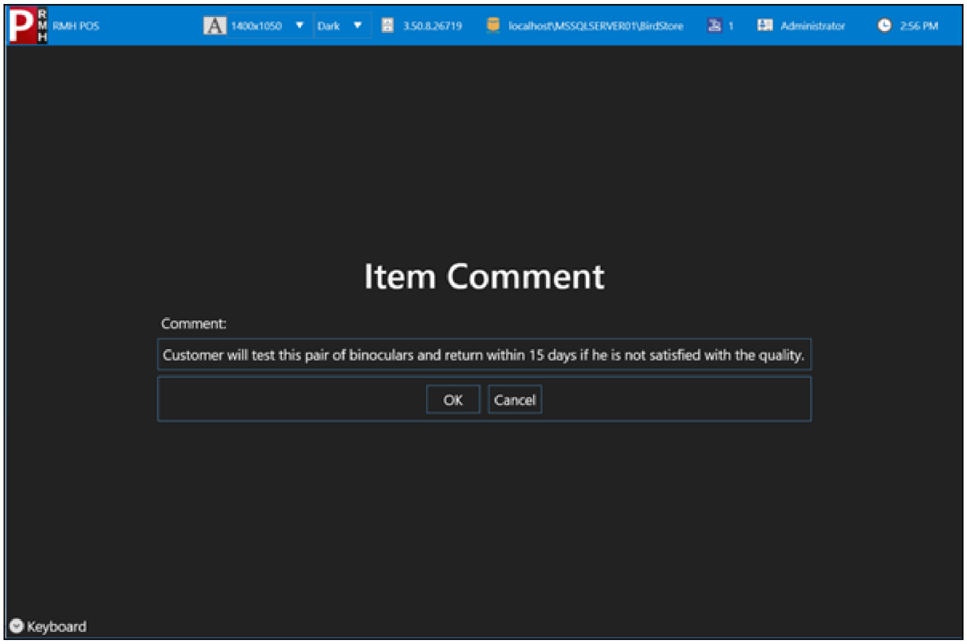
> **Pre-requisites:** You must have the **Allowed to delete entries from transactions** permission to delete items from the transaction item list in POS.

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**.

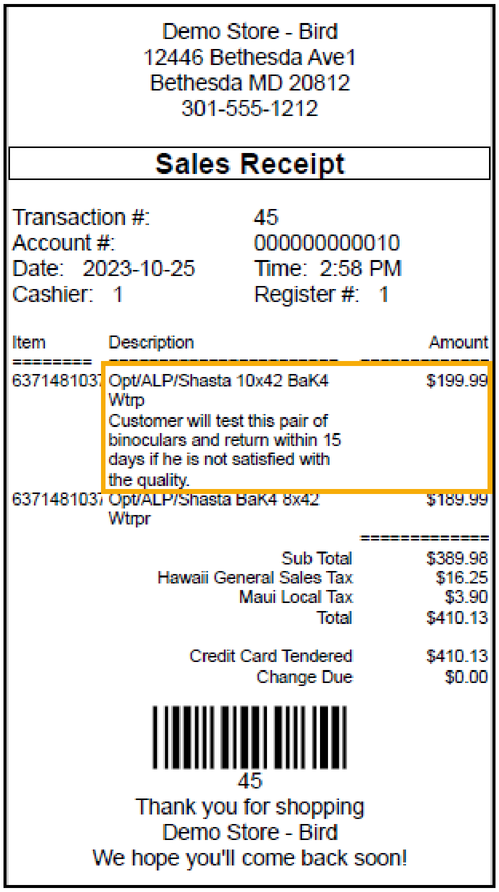
5. Tap **Transaction** | **Tender Sale** or press **F12**.

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
637148103	Opt/ALP/Shasta 10x42 BaK4 Wtrp Customer will test this pair of binoculars and return within 15 days if he is not satisfied with the quality.	$199.99
637148103	Opt/ALP/Shasta BaK4 8x42 Wtrpr	$189.99

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

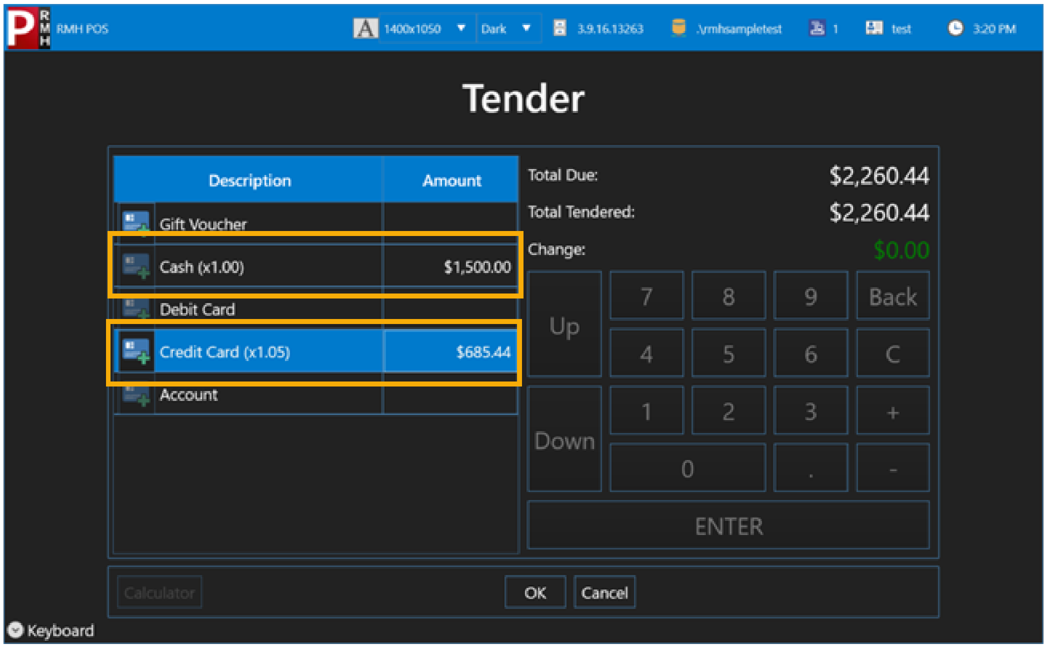
After you have entered all of the items and the customer is ready to pay, you can tender the sale (also known as accepting payment).

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

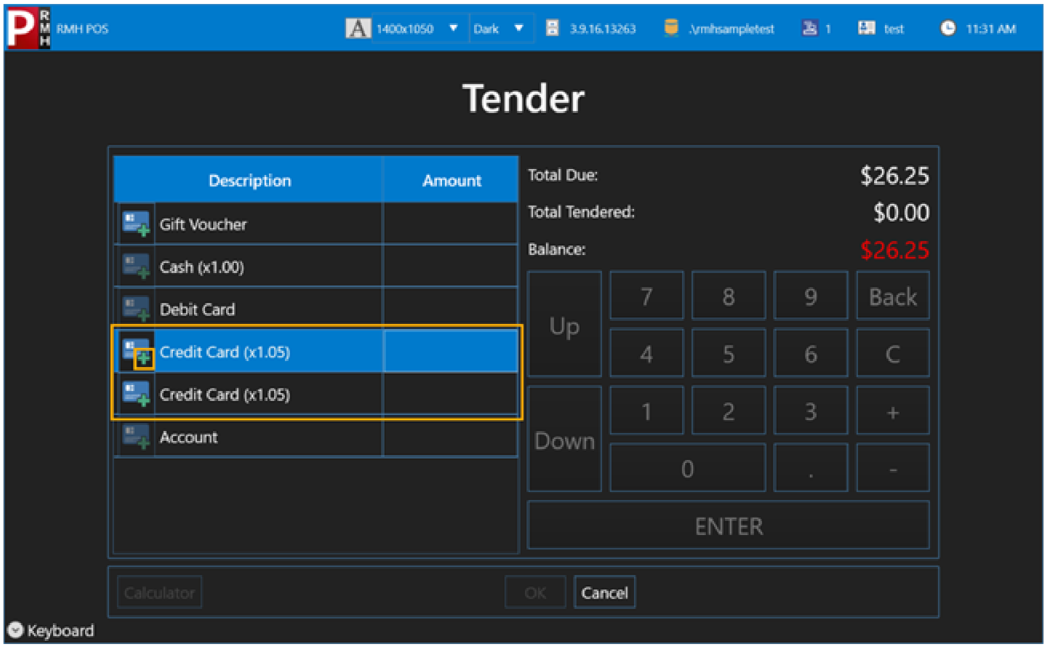
2. On the **Tender** screen, enter the tender amount next to the relevant tender type.

> **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 20 Blue	$1,494.00
INT	Intact Cycle Helmet OSFM ASSORTED	$299.00
	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!

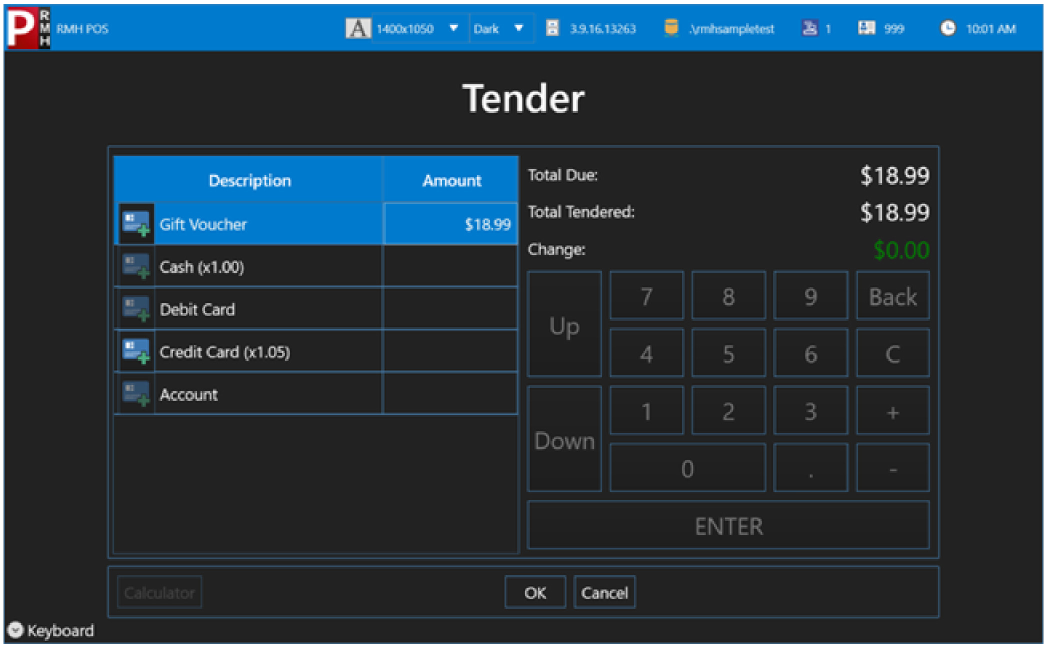
Tendering a sale using a voucher

1. Enter all of the items in the transaction.

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

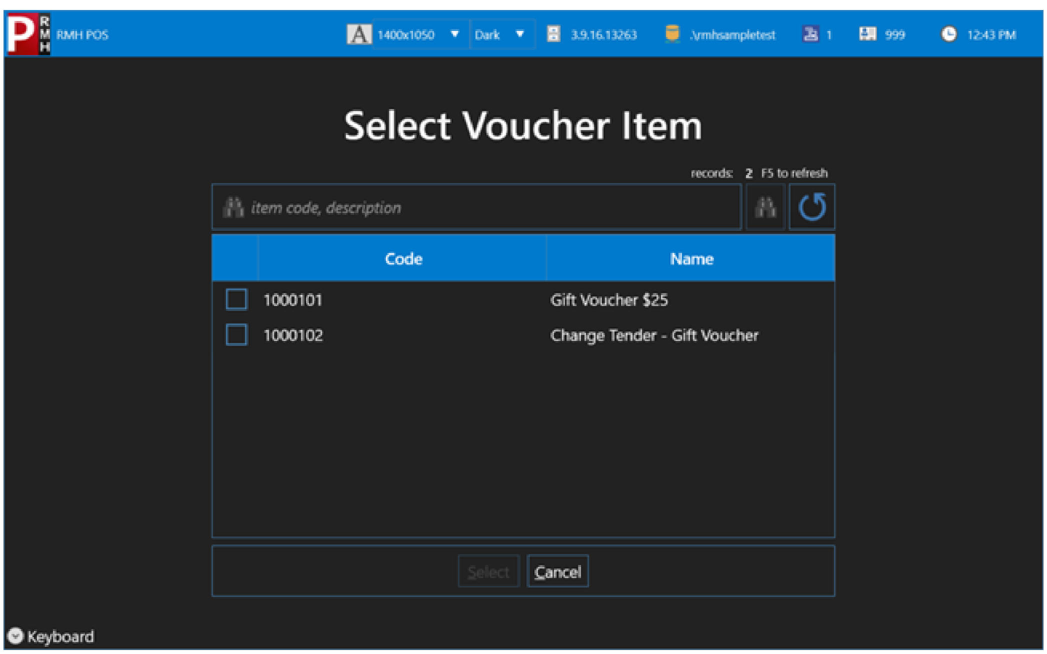
3. On the **Tender** screen, enter the amount the customer wants to redeem from the voucher next to the **Voucher** tender type.

   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.

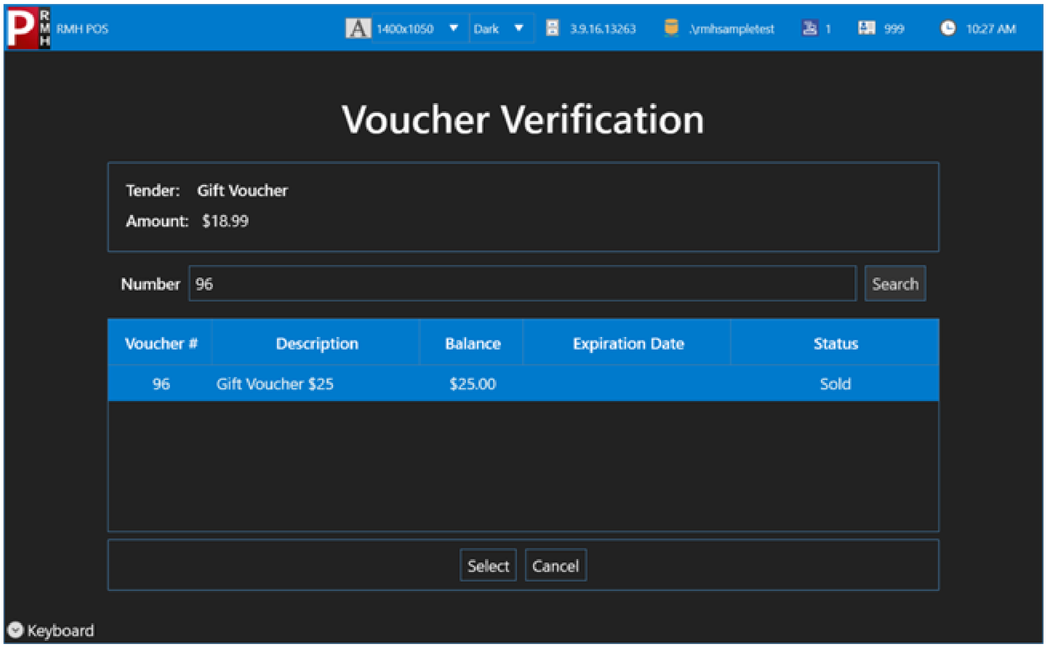


4. Tap **OK**.

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.

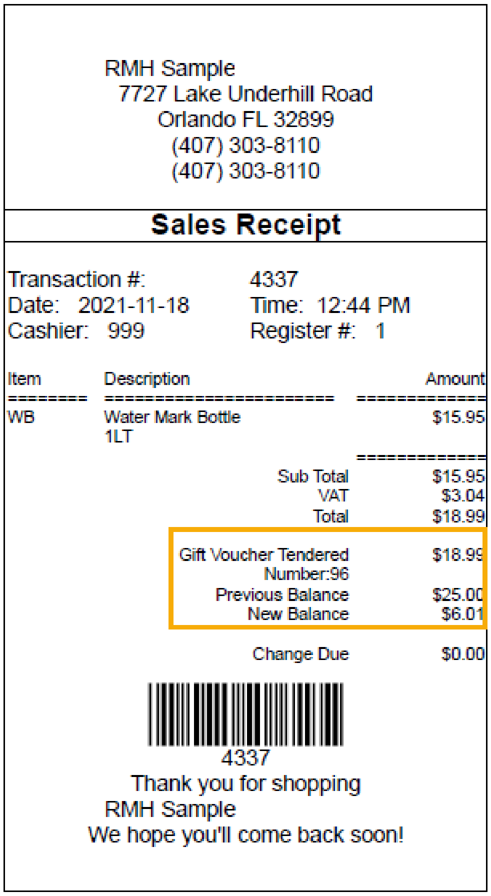


7. Tap **Search** or press **Enter**.

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 1LT		$15.95
		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**.

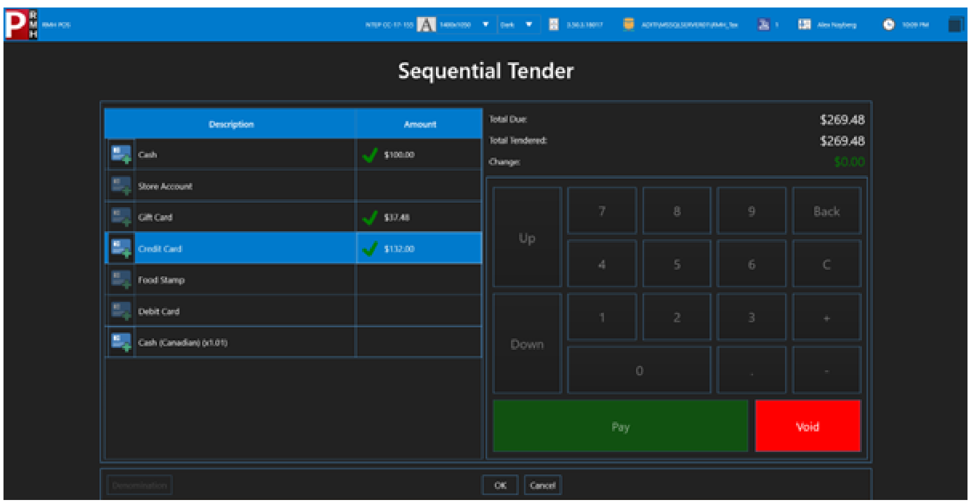
5. Process the payment, e.g., follow the prompts on the POS terminal.

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.

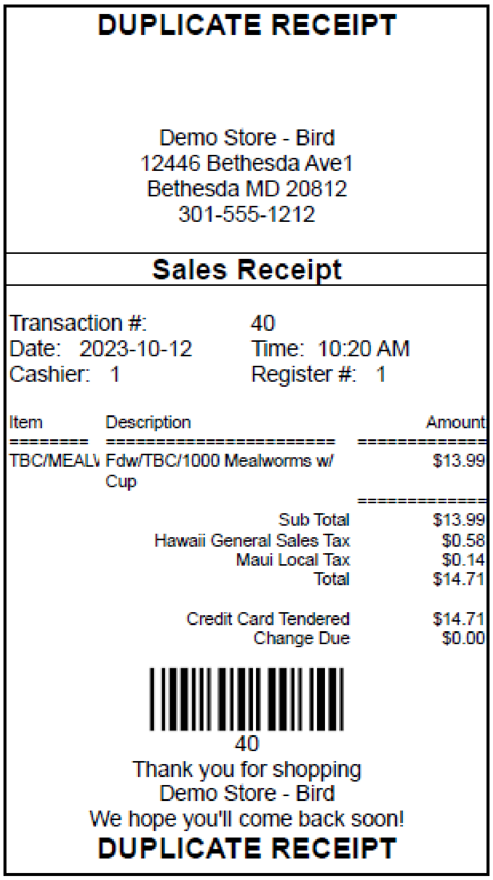
> **Pre-requisites:** You must have the **Allowed to review printed Journals** permission to look up receipts in the Journal in POS.

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/ Cup	$13.99
	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**.

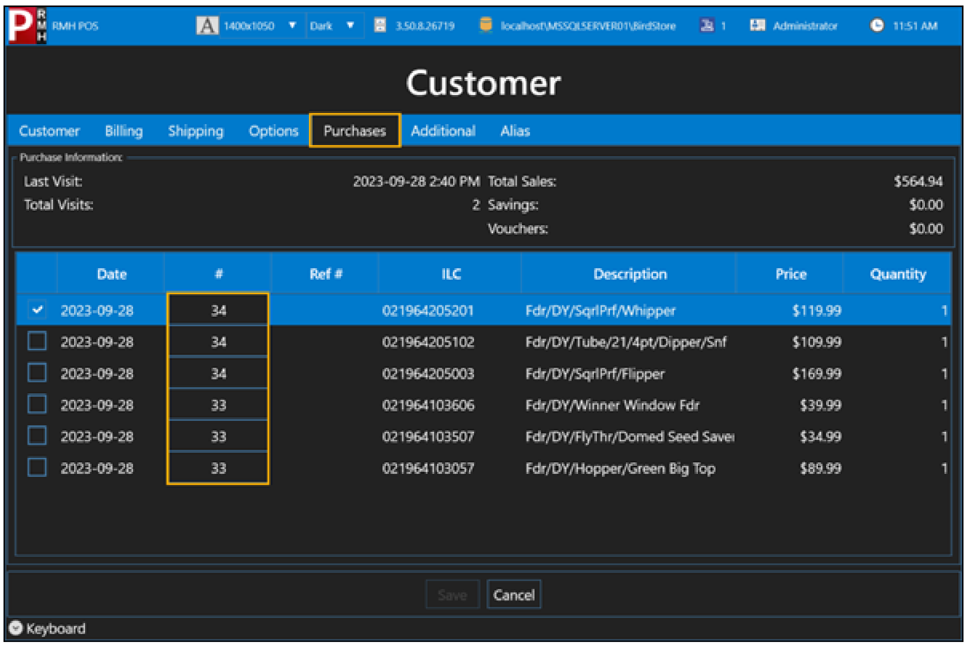
3. To select the customer, do one of the following:

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

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

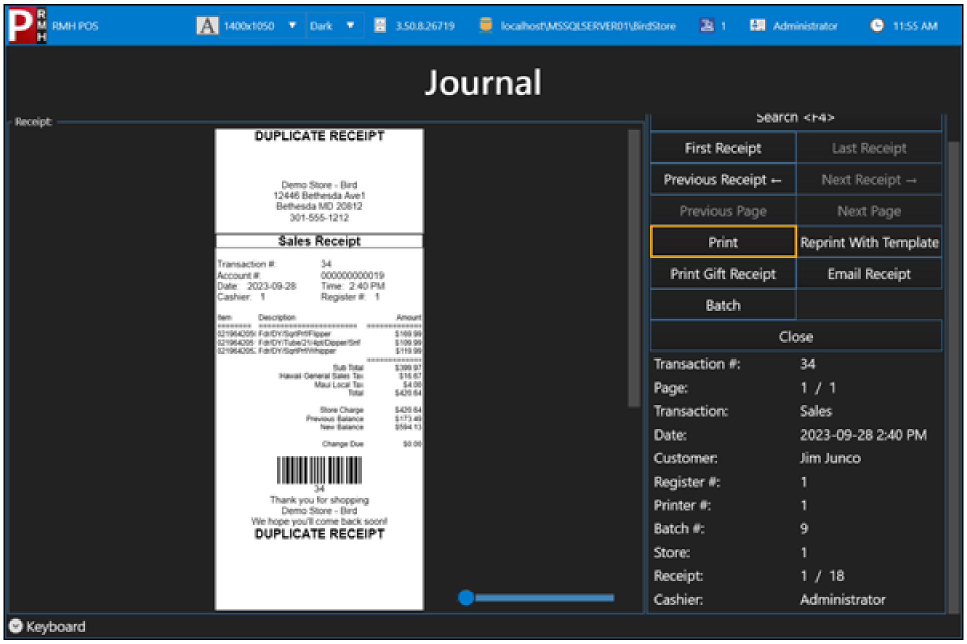
5. Tap the **Purchases** tab.

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**.

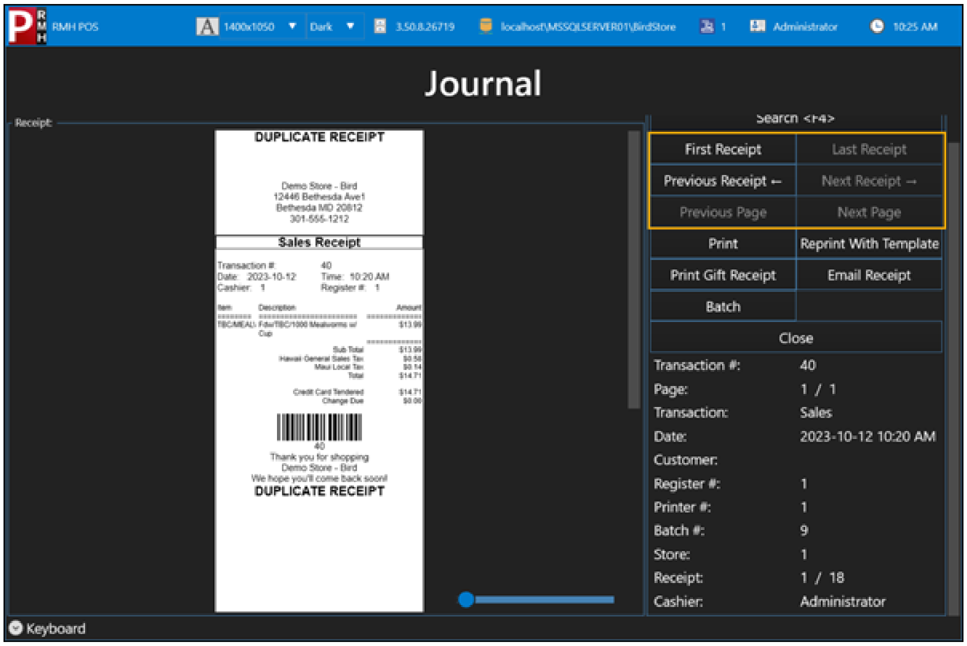
If the transaction was completed earlier in the day (e.g., in the current open batch):

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.

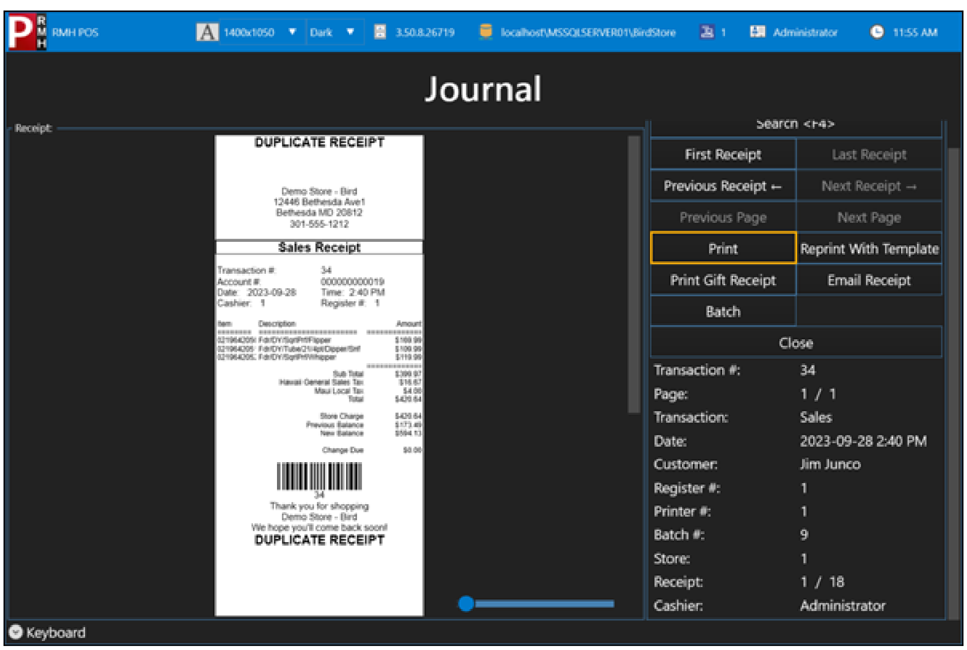
2. Use the navigation options to find the transaction.

   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.



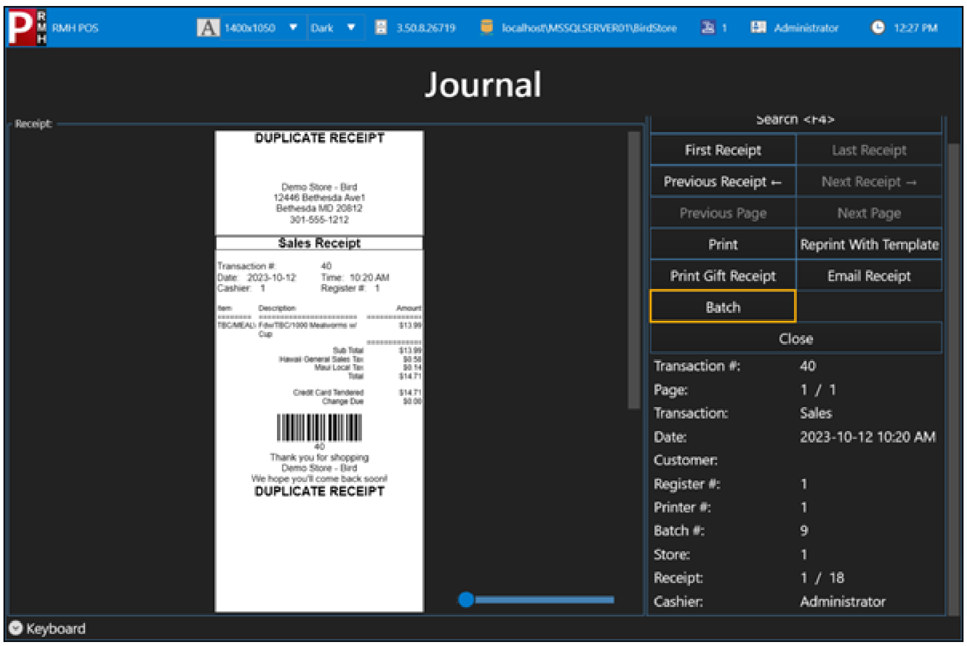
4. If prompted, tap the printer to select it and tap **OK**.

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

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

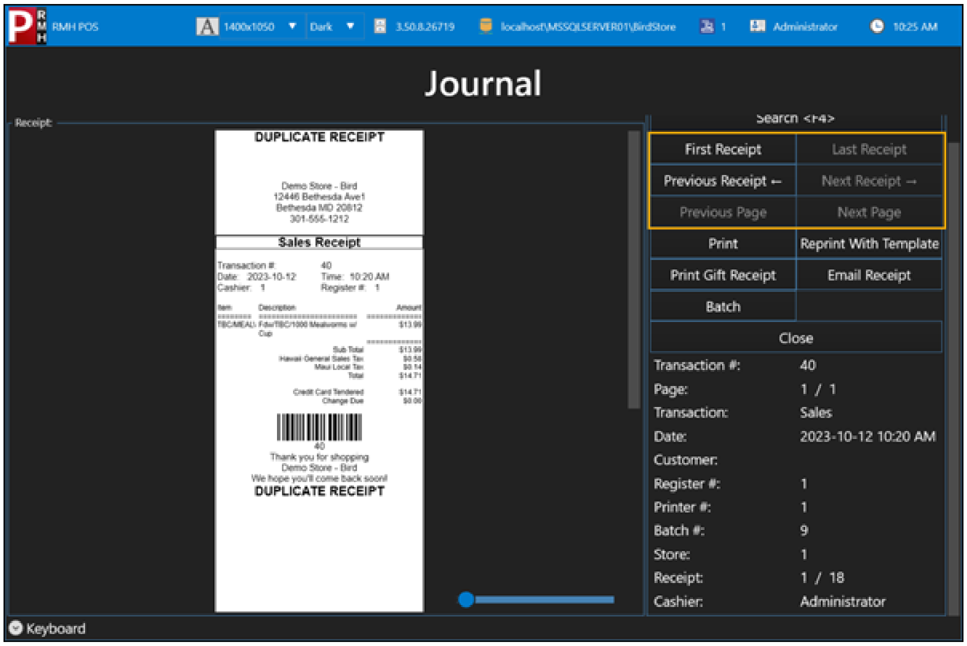
   The journal contains all transactions for the store. Transactions in the journal are organized into batches. A unique batch number is assigned to each register when it is opened. This batch remains open until a Z report is generated to close the register.

2. Tap **Batch**.



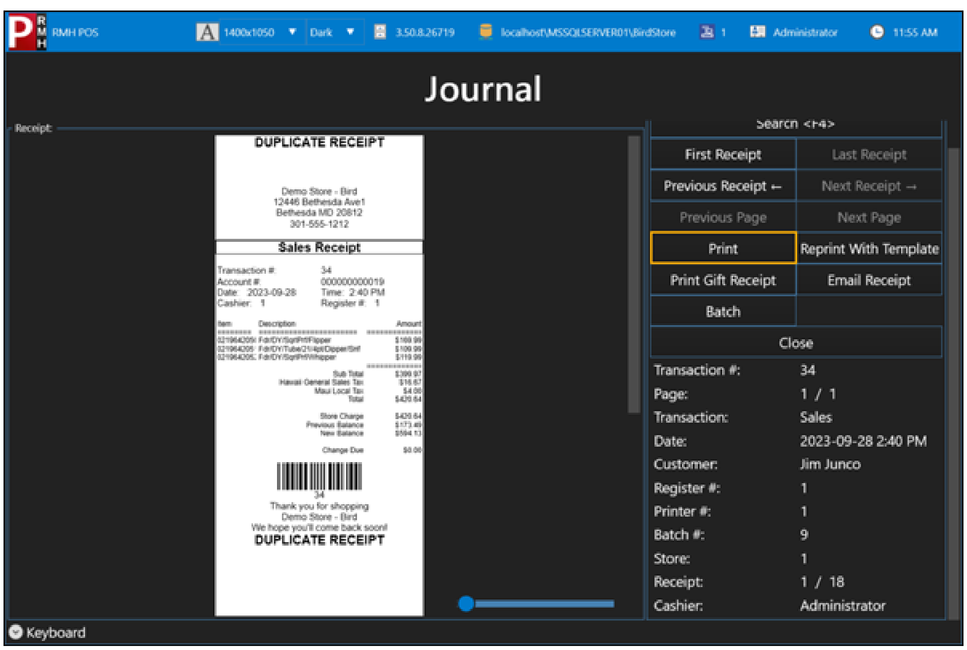
3. Scroll through the list of batches until you find the correct batch.

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.



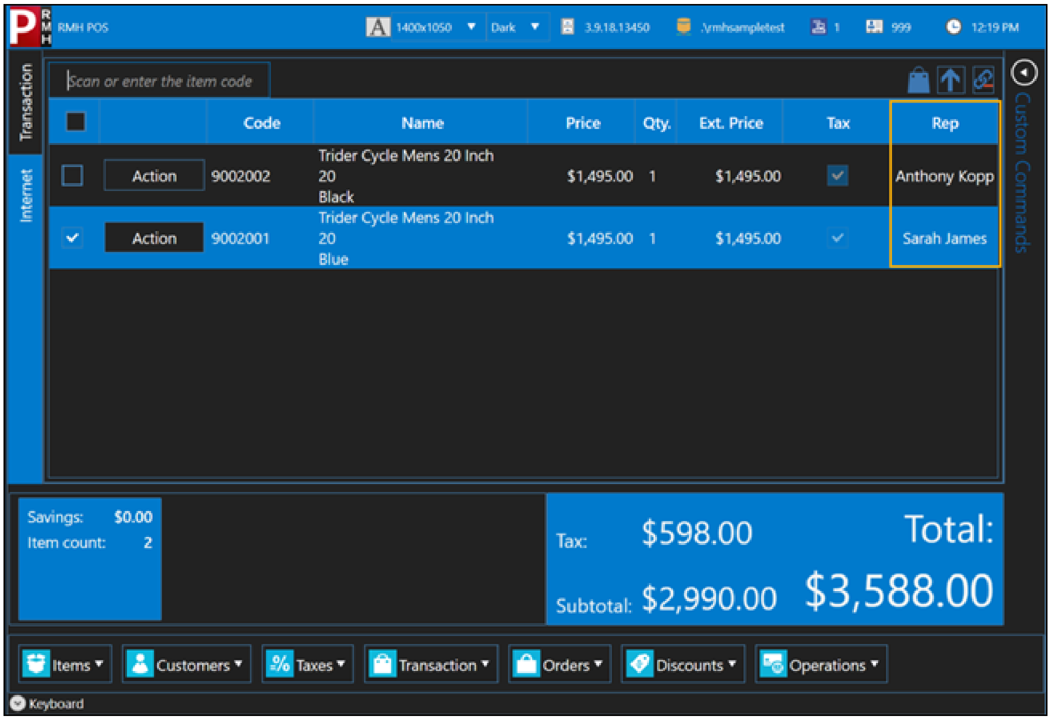
6. If prompted, tap the printer to select it and tap **OK**.

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.

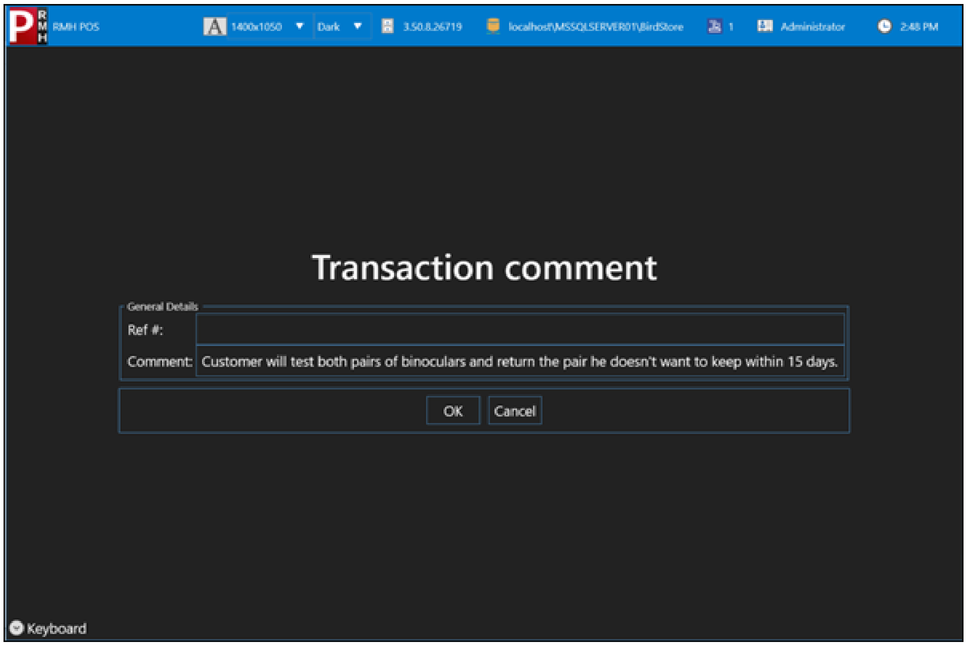
   The sales representative's name displays next to the item.



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**.

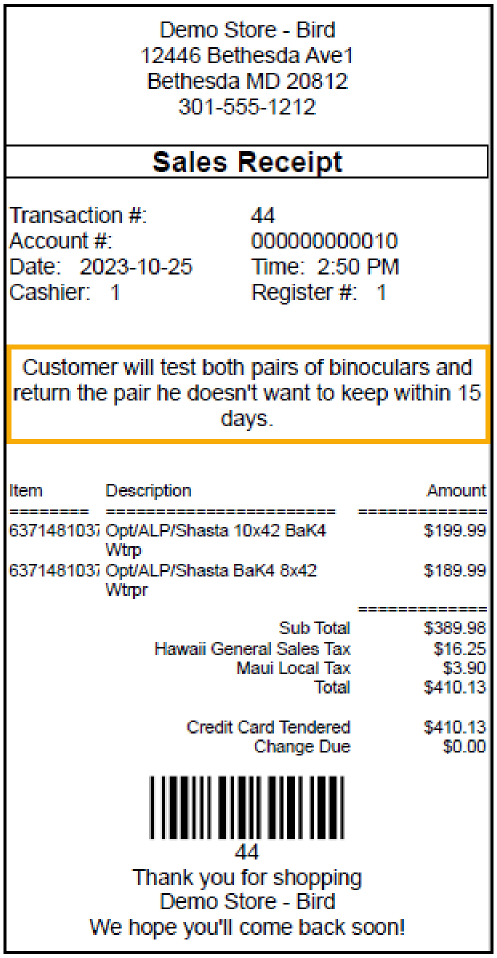
4. Tap **Transaction** | **Tender Sale** or press **F12**.

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 Wtrp	$199.99
6371481037	Opt/ALP/Shasta BaK4 8x42 Wtrpr	$189.99
	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:

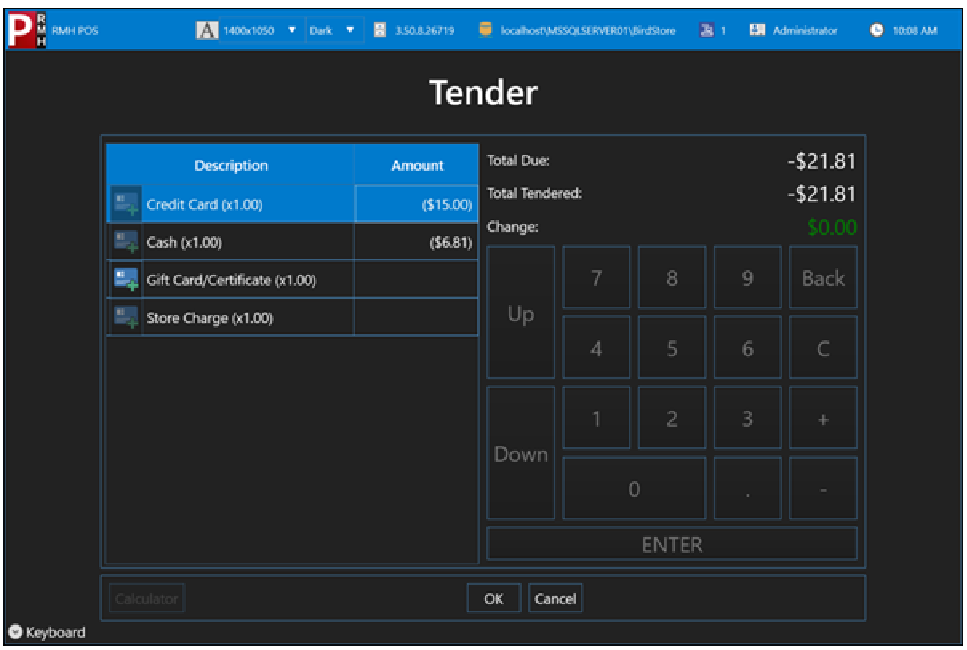
- Enter the transaction number, customer name, or account number (or a combination) and press **Enter**.
- Scroll through the list of transactions until you find the correct one.

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 10oz Return Code: RET-VOID -3 @ $2.99	-$8.97
630088400(	Fdr/MRB/Basket 8 oz Return Code: RET-VOID -1 @ $4.99	-$4.99
630088404(	Suet/WBC/ PatioWise Cake 10oz Return Code: RET-VOID -1 @ $3.99	-$3.99
630088402(	Suet/WBC/Birdwise Cake 8oz Return Code: RET-VOID -1 @ $2.79	-$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

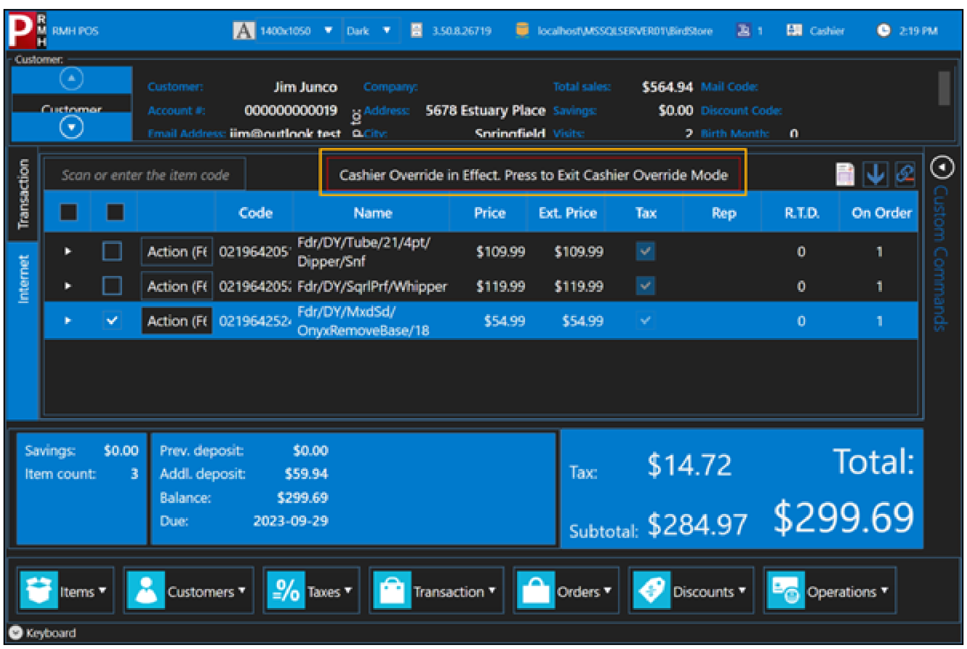
cashier override so you can complete the task. During a cashier override, the other employee will temporarily log in to POS using their login credentials and either complete the task themselves or supervise you while you complete the task.

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:

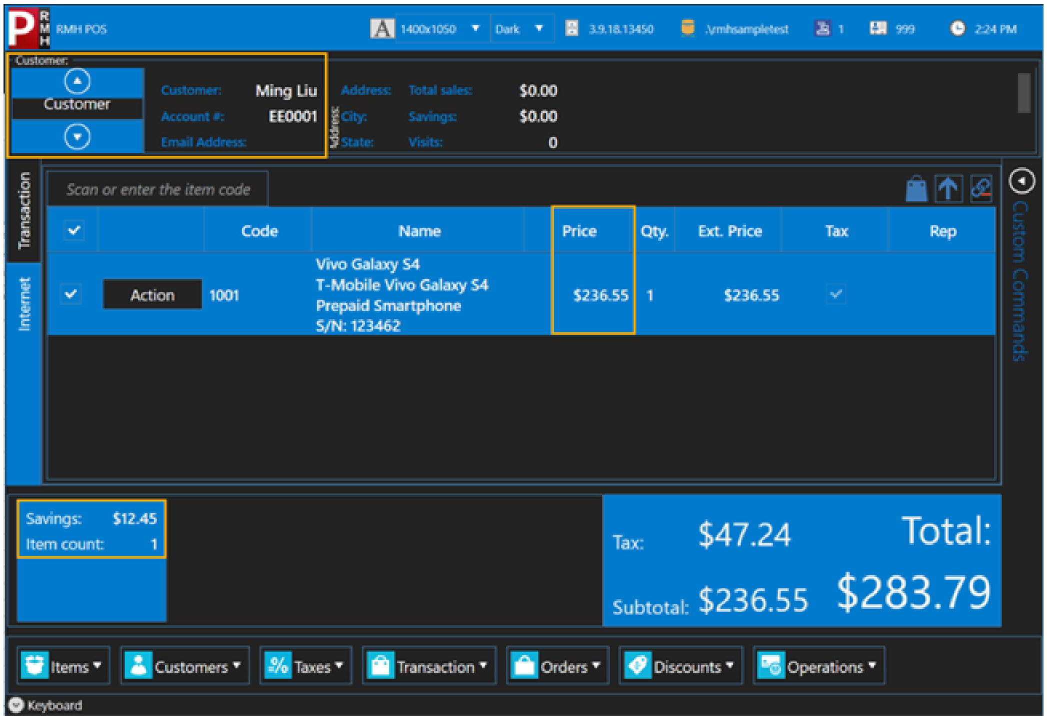
- (Recommended) Add the employee to POS as a customer and specify a discount in their customer record. This discount is automatically applied to the transaction when the customer record is selected.
- Enter items in a transaction and manually select a discount to apply a discount to the transaction.

> **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.

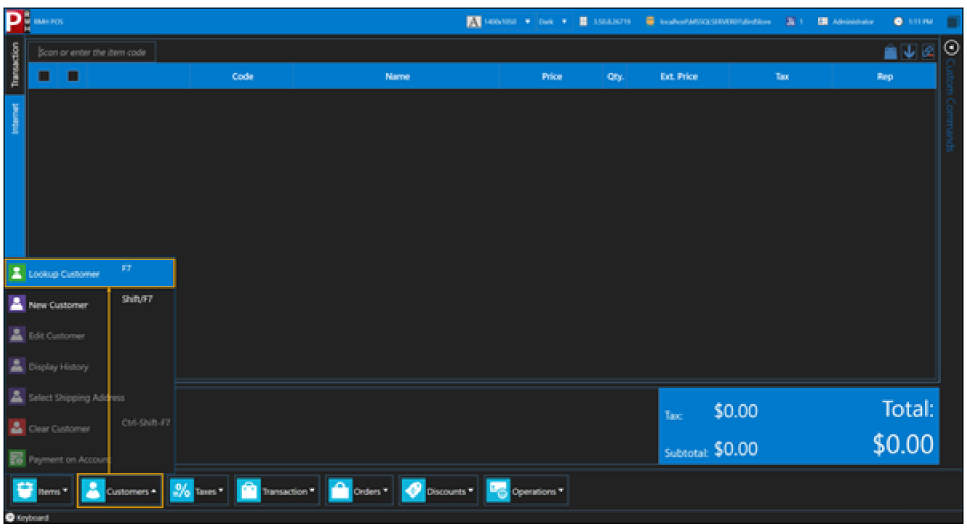
Working with customers

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.

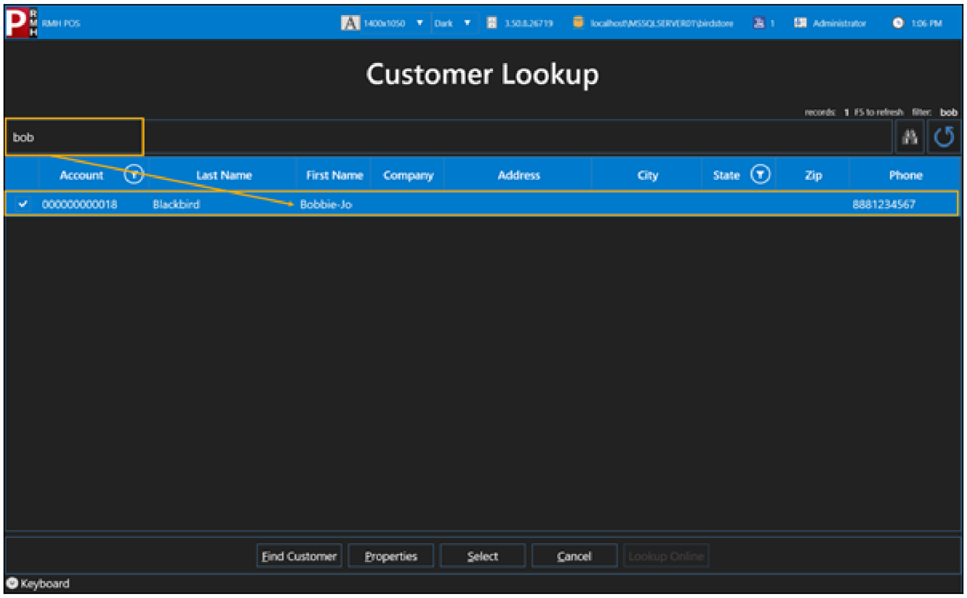
> **Pre-requisites:** You must have the **Allowed to view and edit all customers** permission to look up customers in POS.

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



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

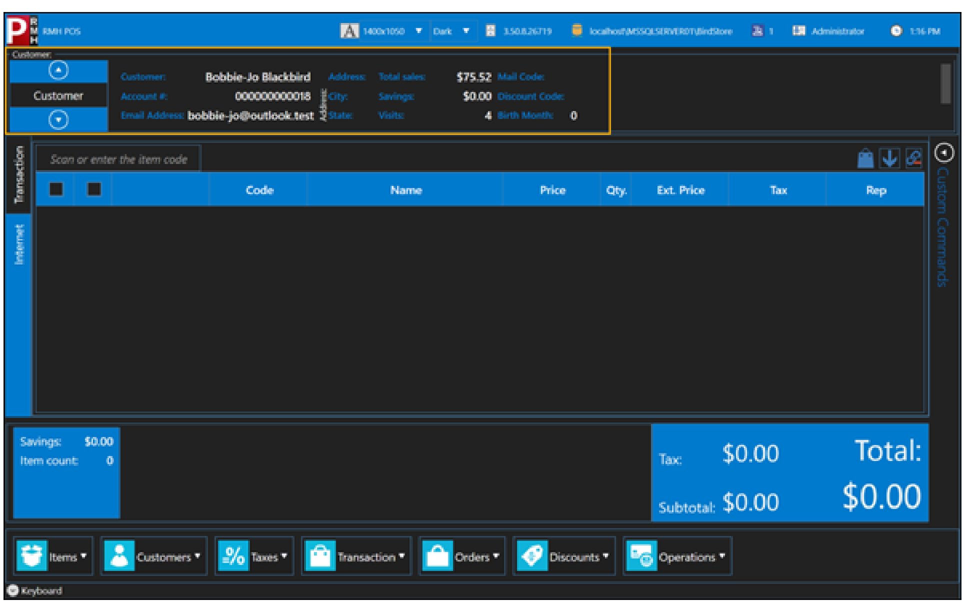
   If there are multiple ways to spell a customer's name, you can either ask them to spell out their name or you can try entering part of the name. For example, if the customer says their name is Bobbie-Jo Blackbird, you could try entering just Bob or Bob Black.



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.

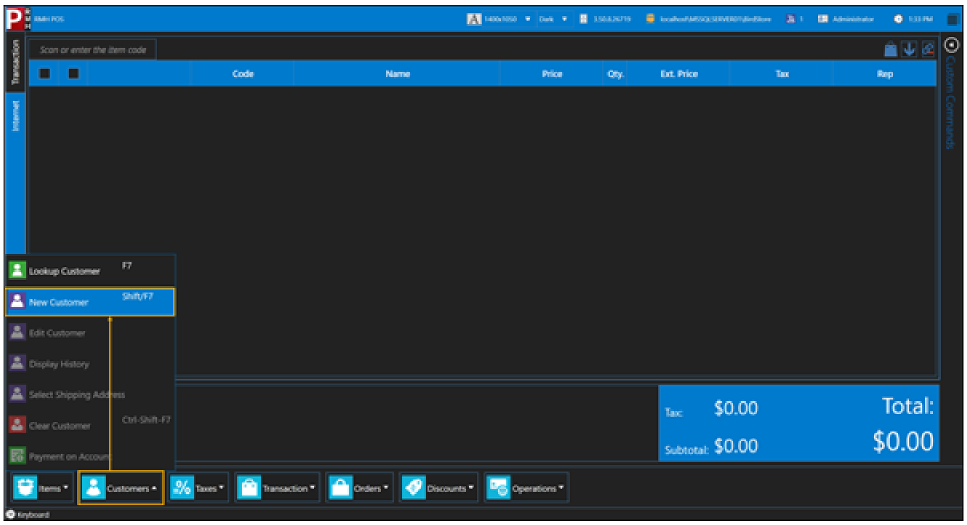
The customer's information displays in the **Customer** pane at the top of the POS screen.



Adding customers

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

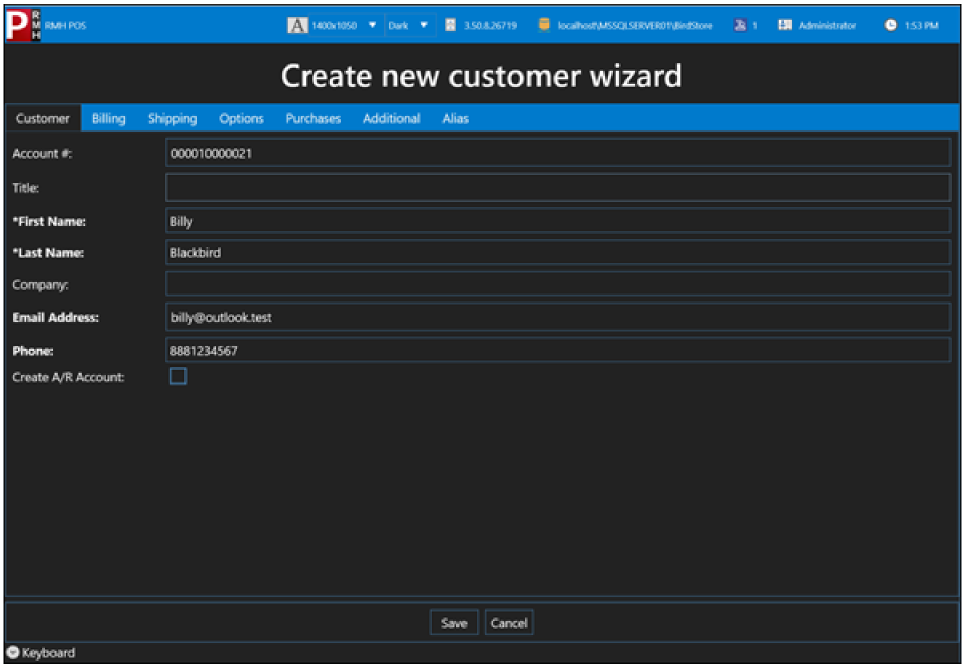
1. Tap **Customers | New Customer**.



2. On the **Customer** tab, enter the customer's contact information, such as:

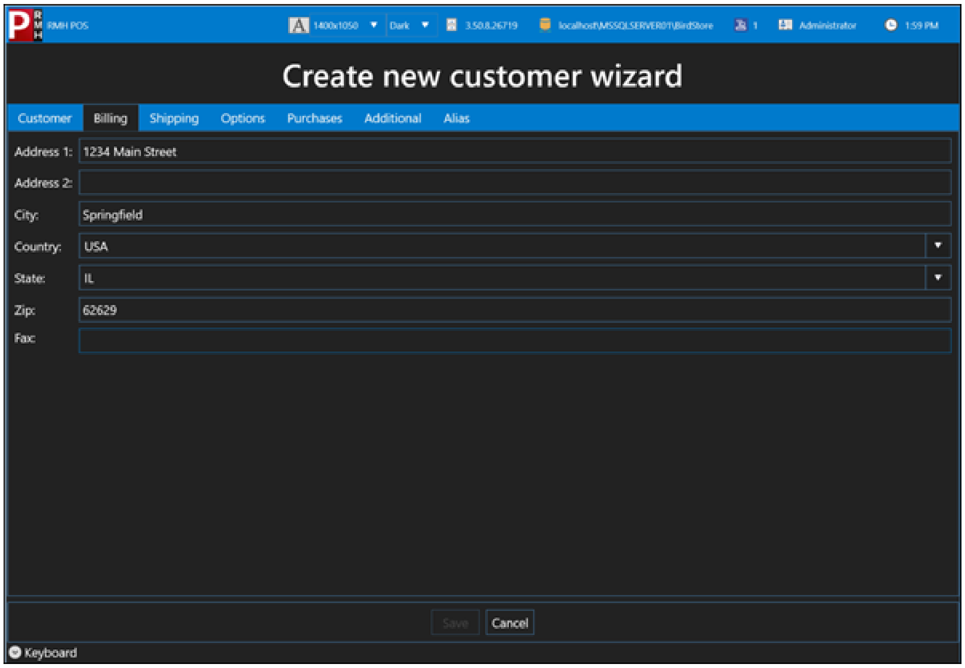
    - Title
    - First Name
    - Last Name
    - Company (if applicable)
    - Email Address
    - Phone

    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.

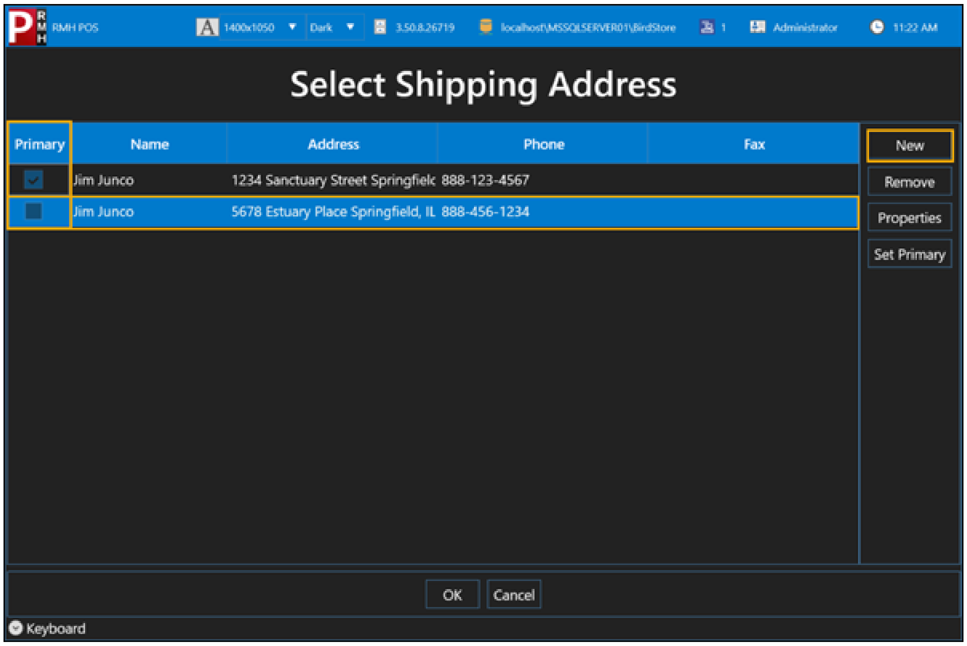
1. Look up the customer. Refer to Looking up customers for more information.

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.

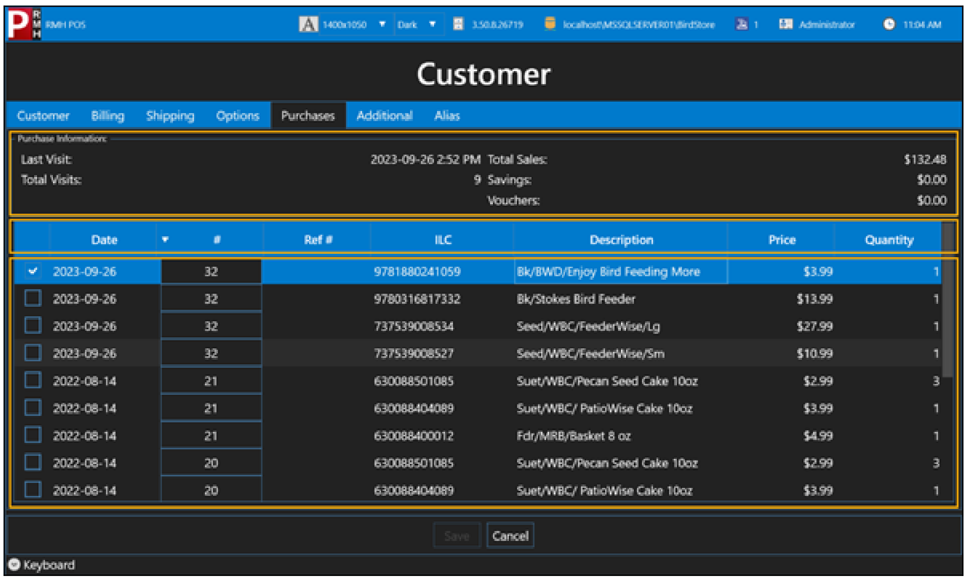
1. Look up the customer. Refer to Looking up customers for more information.

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

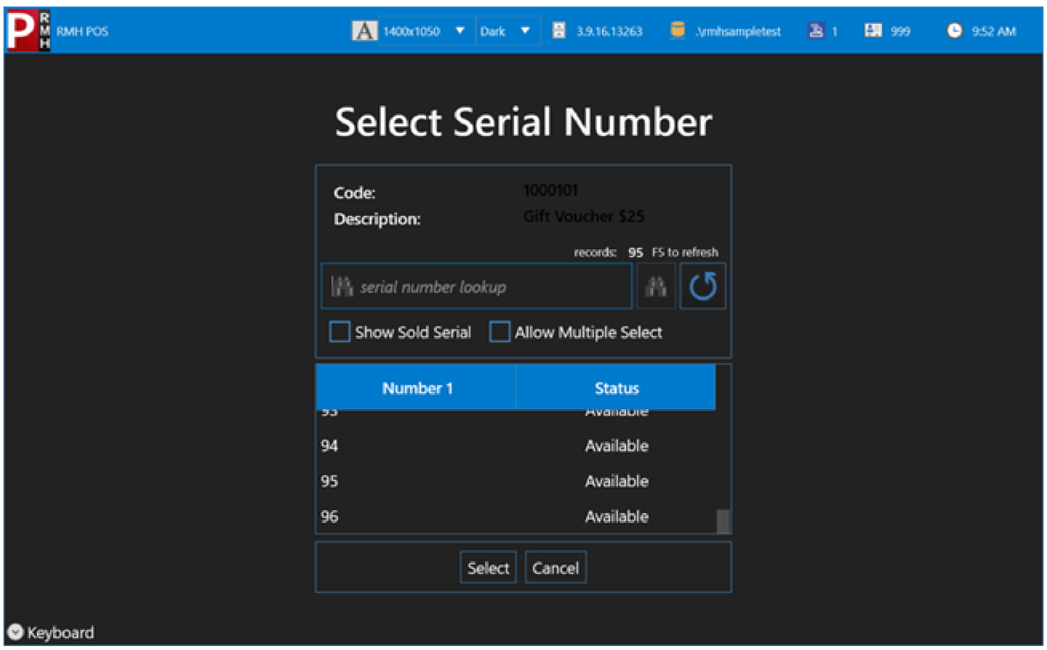
Vouchers can include **gift certificates** and **gift cards**. Gift certificates are typically printed on paper or card stock. Gift cards are typically plastic cards that have a bar code or magnetic stripe. Customers purchase vouchers as a form of prepayment for items or services. Customers typically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

1. Do one of the following:

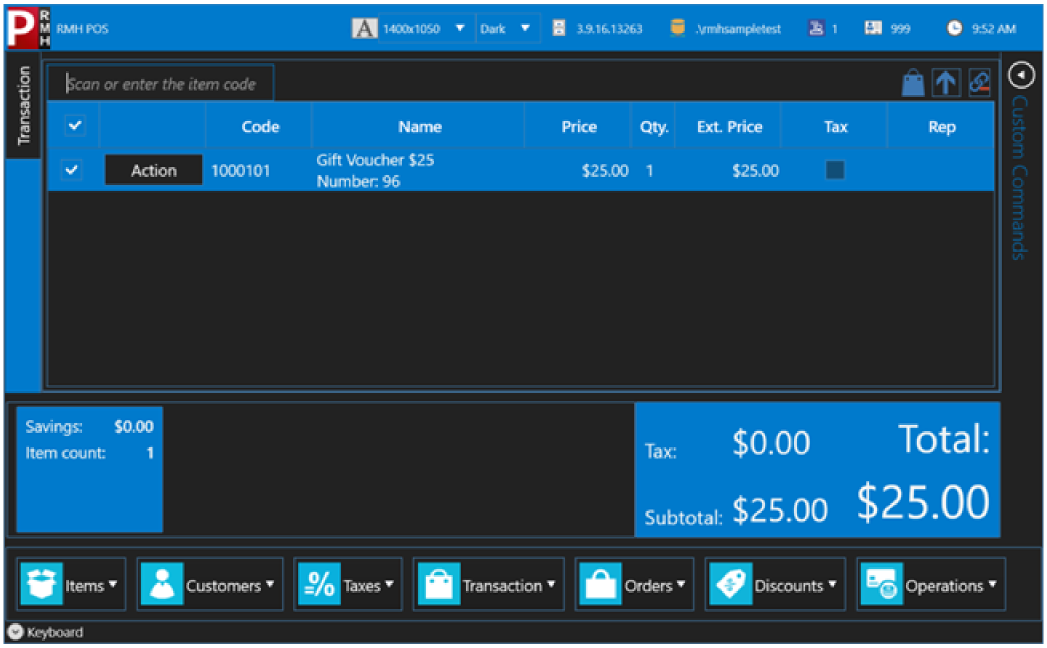
- Scan the voucher.
- Enter the voucher item lookup code (ILC) into the lookup field.

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.

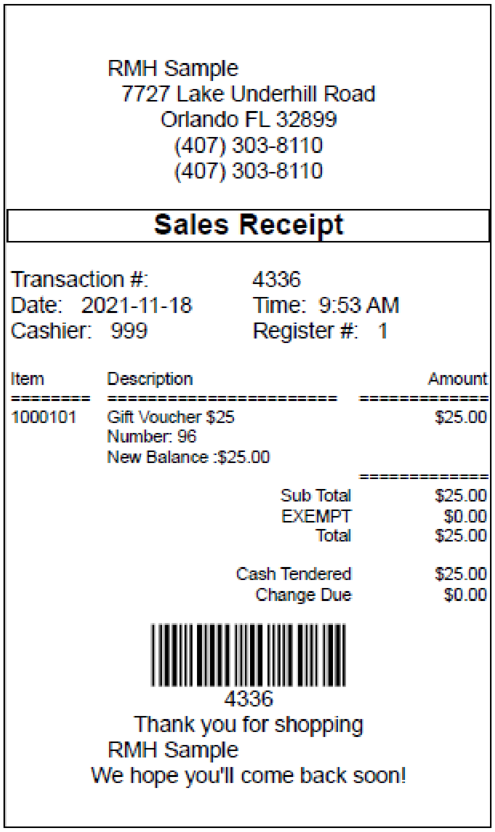


3. Tap **Select**. The voucher is listed as an item on the POS transaction screen.



> **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

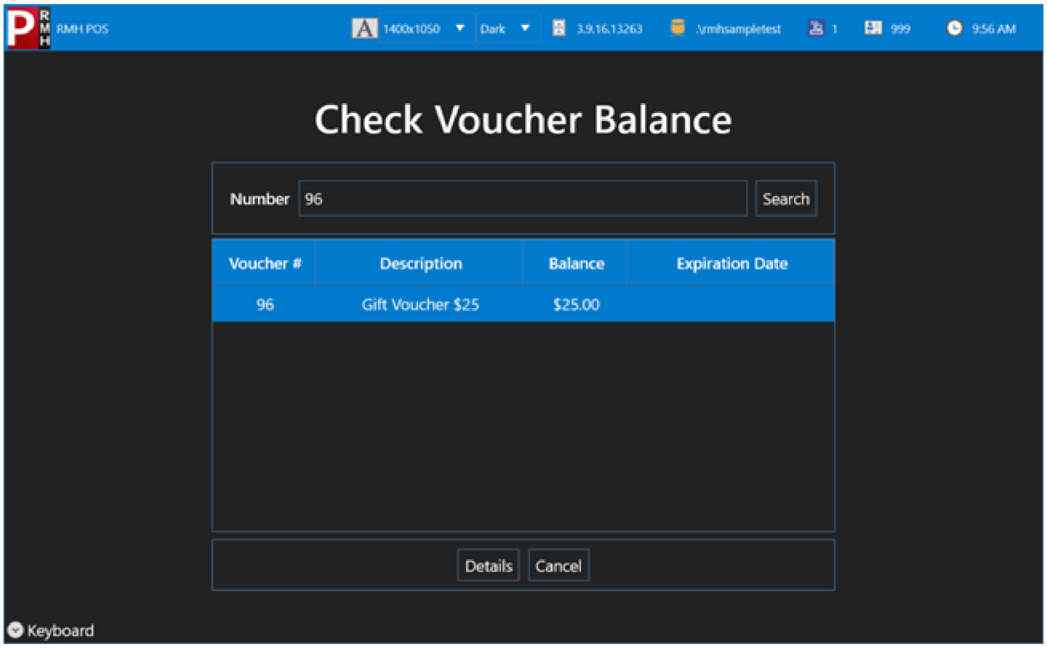
Transaction #: 4336
Date: 2021-11-18 Time: 9:53 AM
Cashier: 999 Register #: 1

Item	Description	Amount
1000101	Gift Voucher $25 Number: 96 New Balance :$25.00	$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 transaction 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.

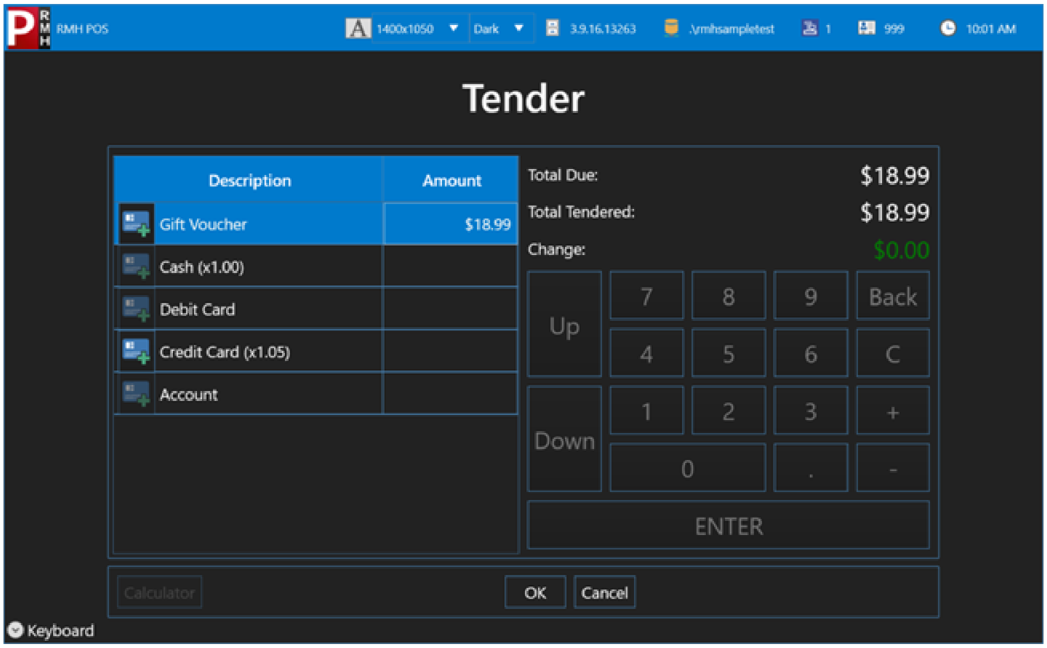
Tendering a sale using a voucher

1. Enter all of the items in the transaction.

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

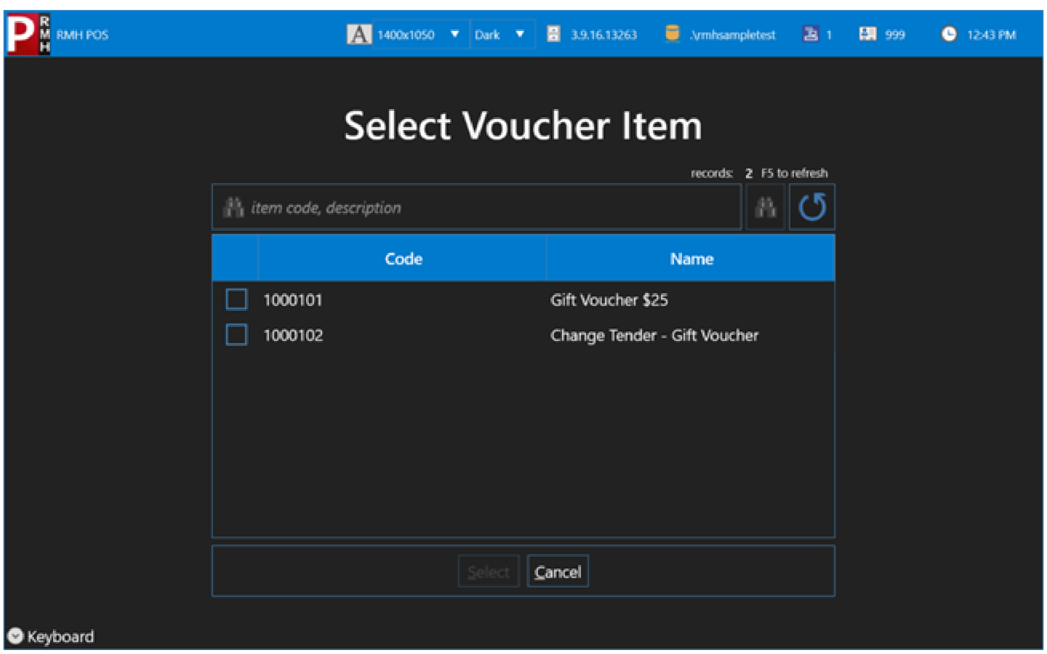
3. On the **Tender** screen, enter the amount the customer wants to redeem from the voucher next to the **Voucher** tender type.

   The customer can redeem a portion of the voucher balance or the full voucher 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.

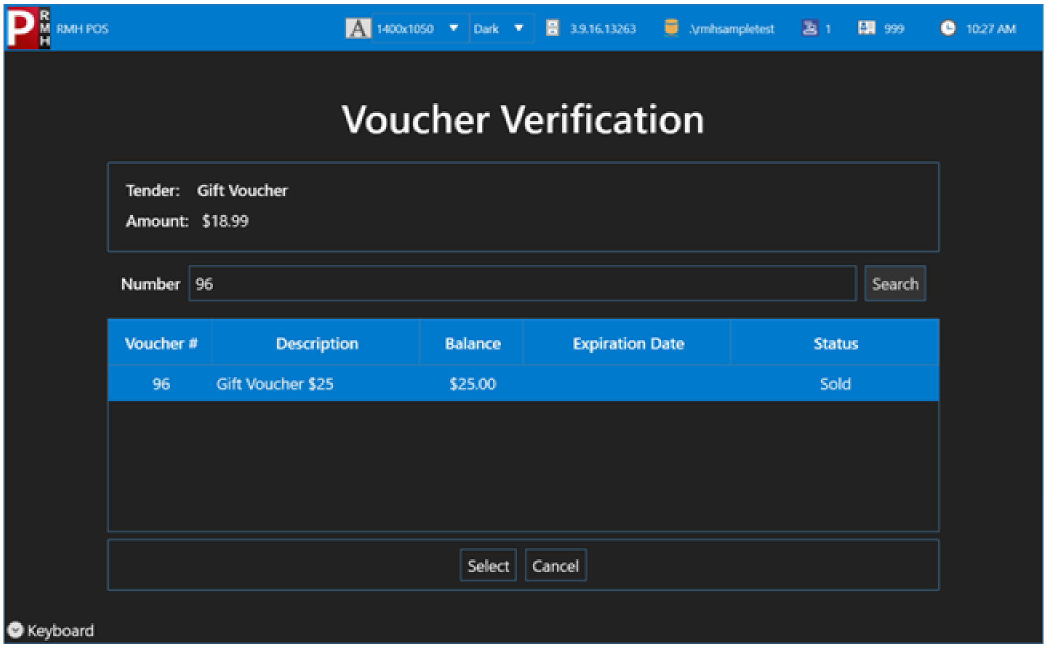


4. Tap **OK**.

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.

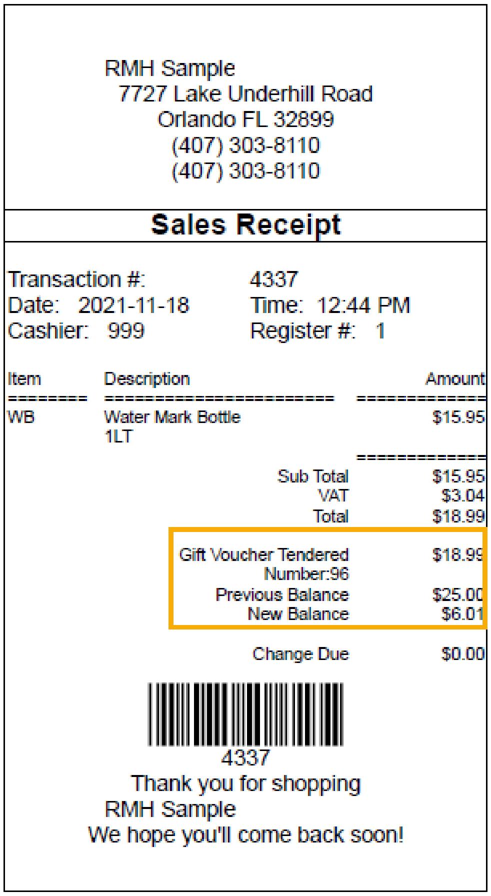


7. Tap **Search** or press **Enter**.

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 1LT	$15.95
	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

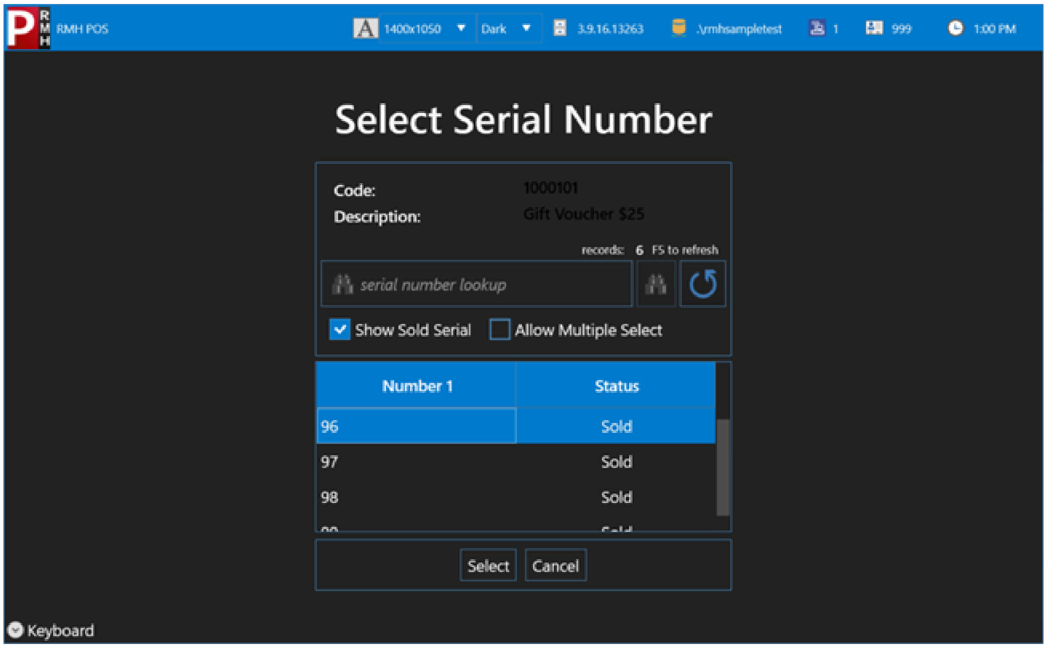
4337
Thank you for shopping
RMH Sample
We hope you'll come back soon!

Reloading gift cards

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

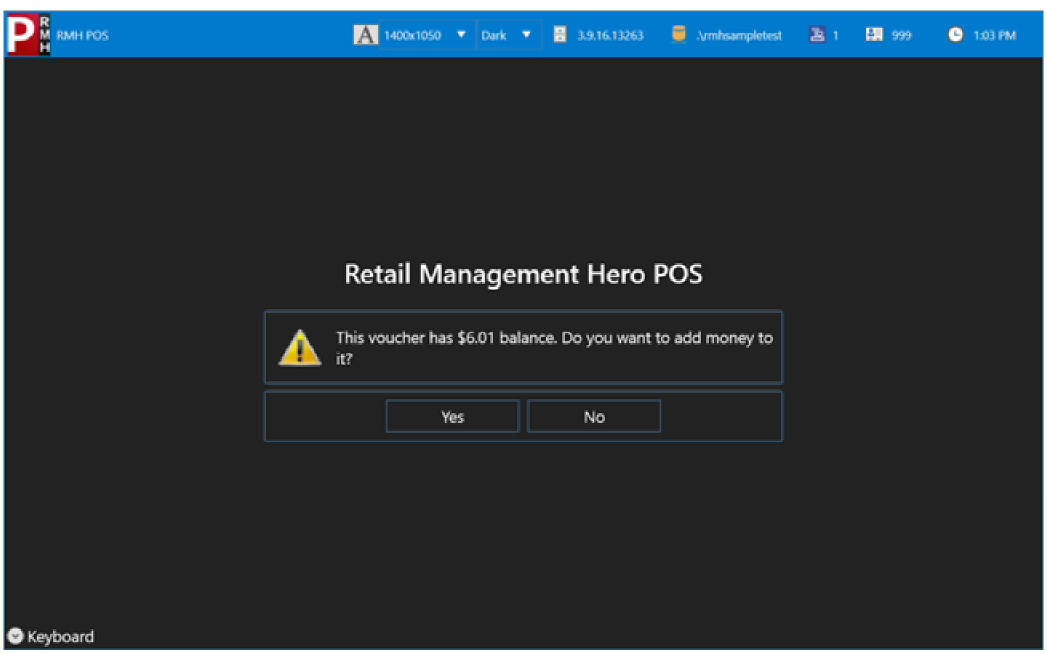
1. Do one of the following:
   - Scan the gift card.
   - Enter the item lookup code (ILC) into the lookup field.
2. On the **Select Serial Number** screen, tap **Show Sold Serial** to select it.
3. Do one of the following:

- 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.

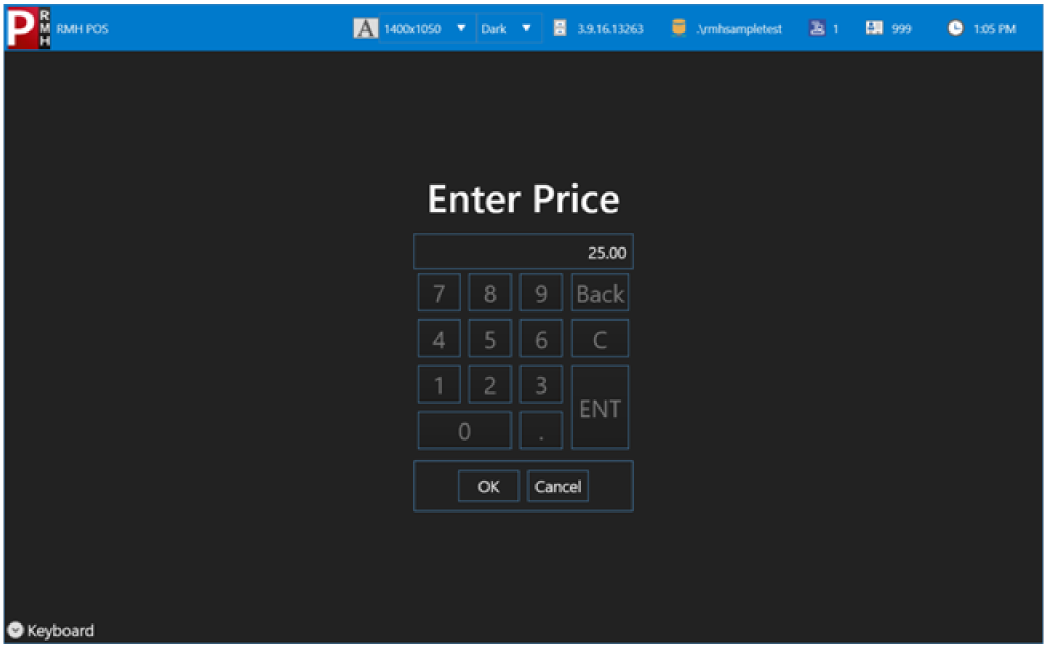


4. Tap **Select**.

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.

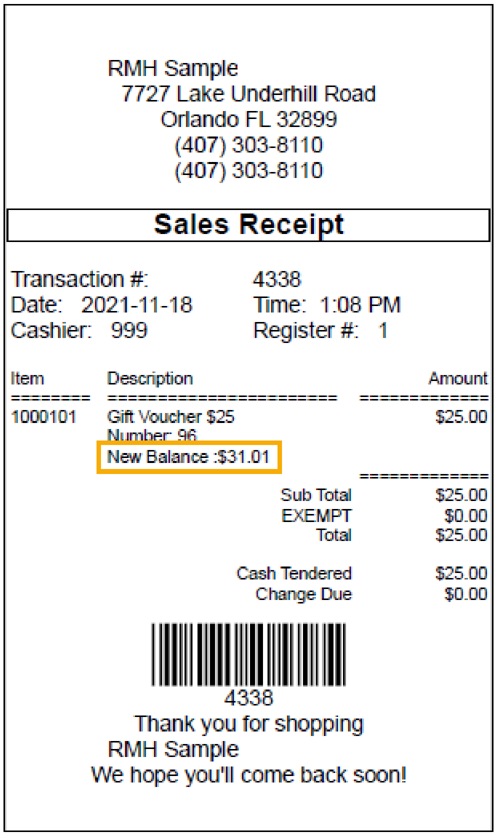
9. Tap **Transaction | Tender Sale** or press **F12**.

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:



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

Sales Receipt

Transaction #: 4338
Date: 2021-11-18 Time: 1:08 PM
Cashier: 999 Register #: 1

Item	Description	Amount
1000101	Gift Voucher $25 Number: 96 New Balance :$31.01	$25.00
	Sub Total	$25.00
	EXEMPT	$0.00
	Total	$25.00
	Cash Tendered	$25.00
	Change Due	$0.00

4338
Thank you for shopping
RMH Sample
We hope you'll come back soon!

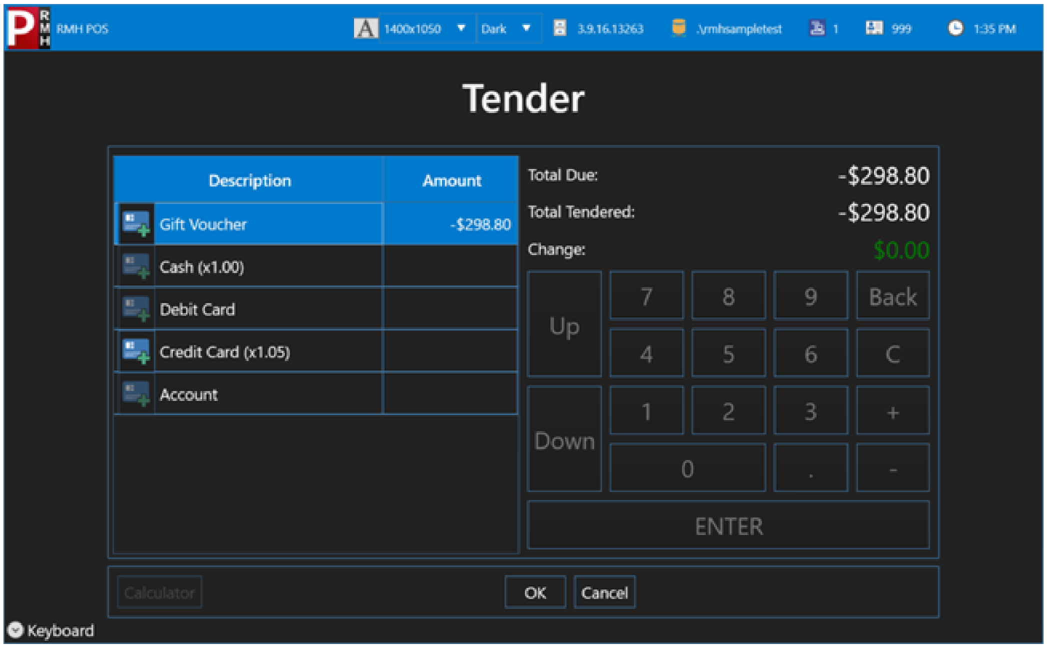
Processing refunds to a voucher

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.

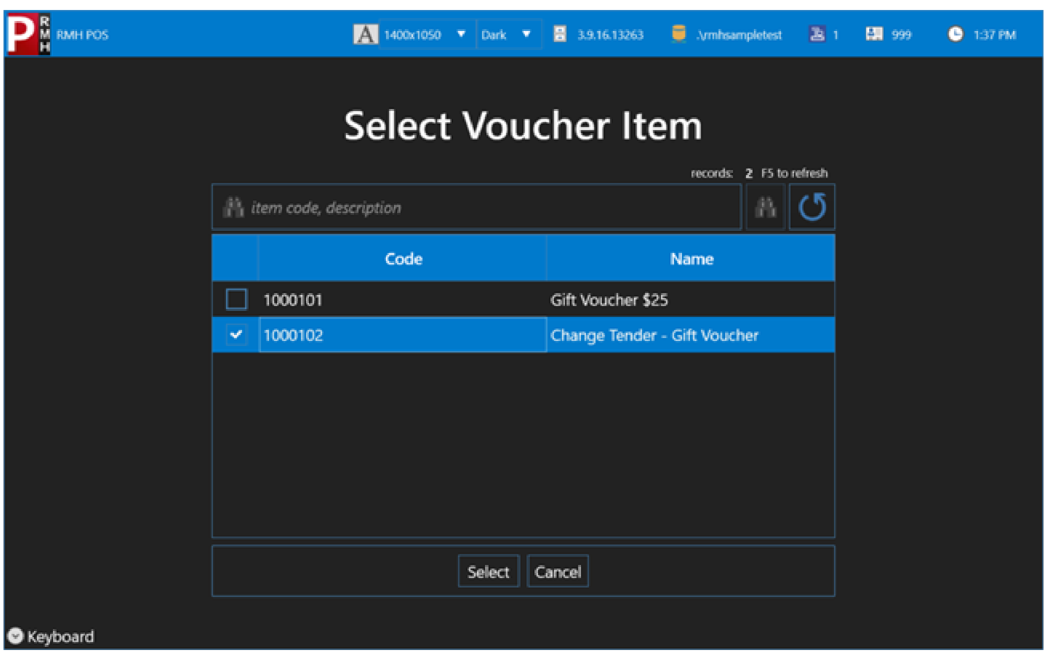
2. Enter the refund amount next to the **Voucher** tender type.

   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**.

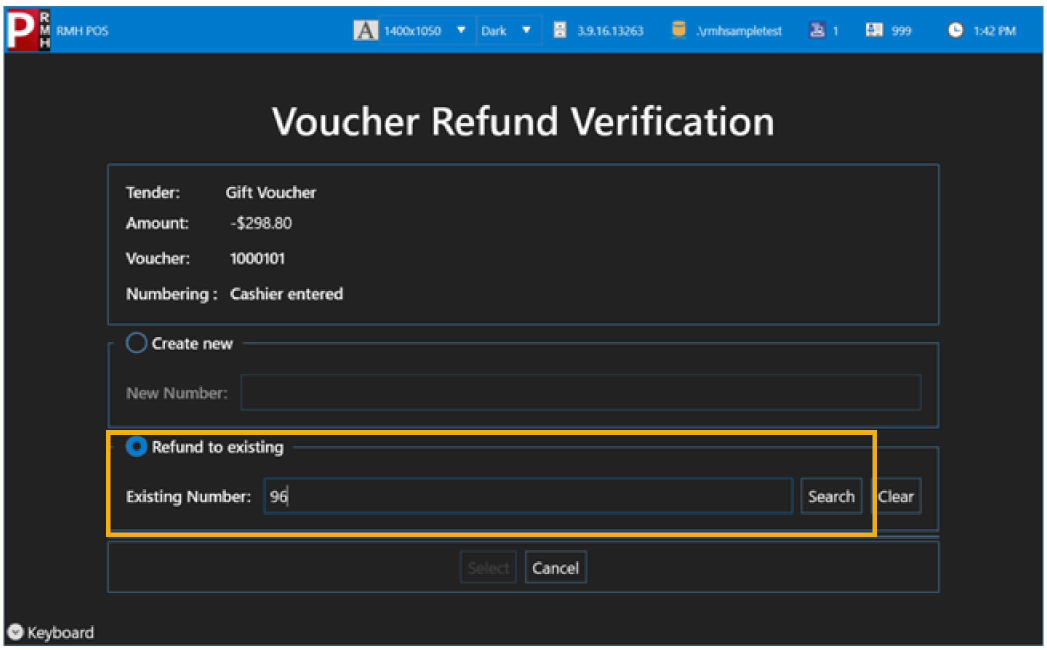


5. On the **Voucher Refund Verification** screen, do one of the following:

- 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.

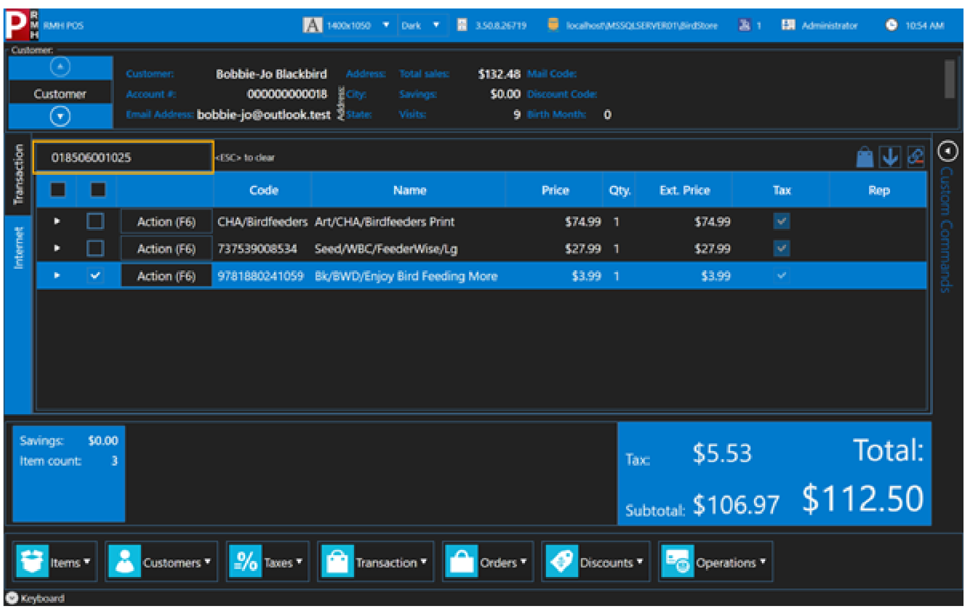
Working with quotes and work orders

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.

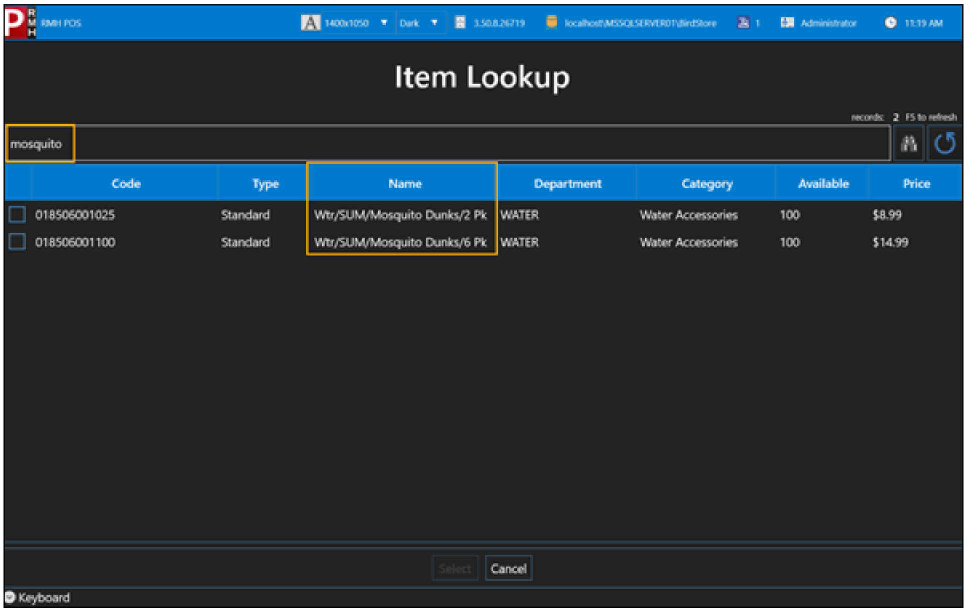
Entering the item lookup code

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.



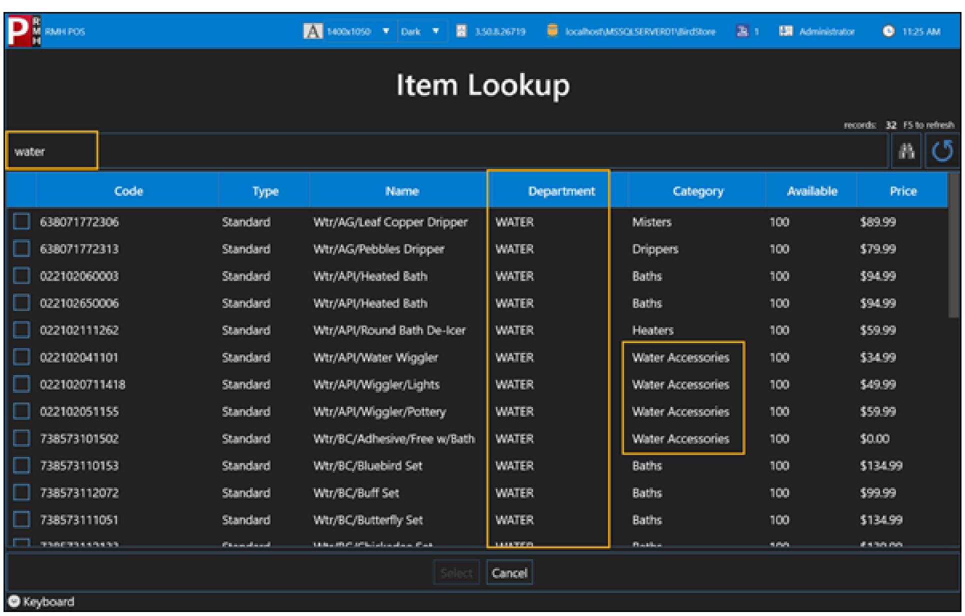
Entering an item name or alias

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.

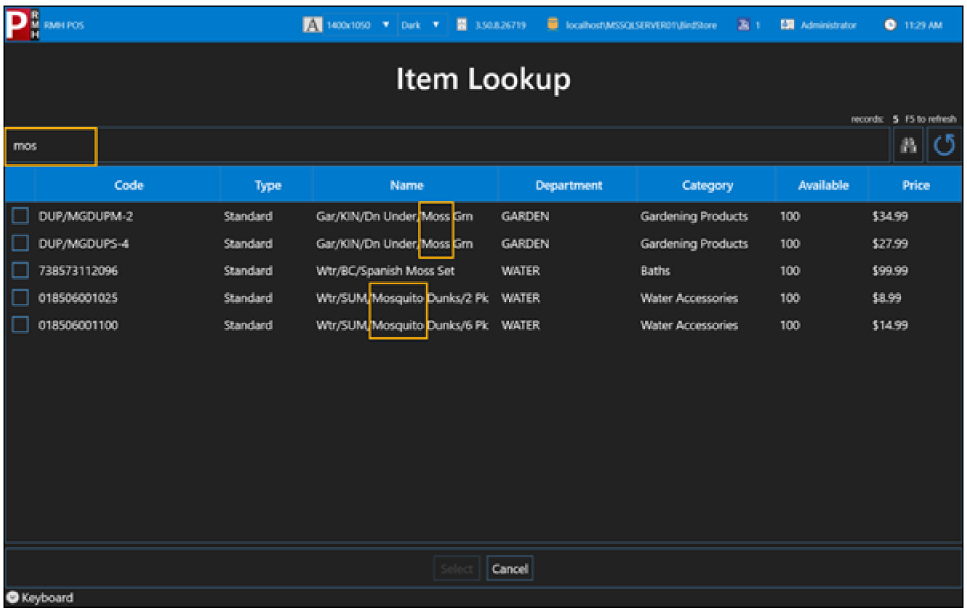


Entering a combination of item name, alias, description, and category

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.

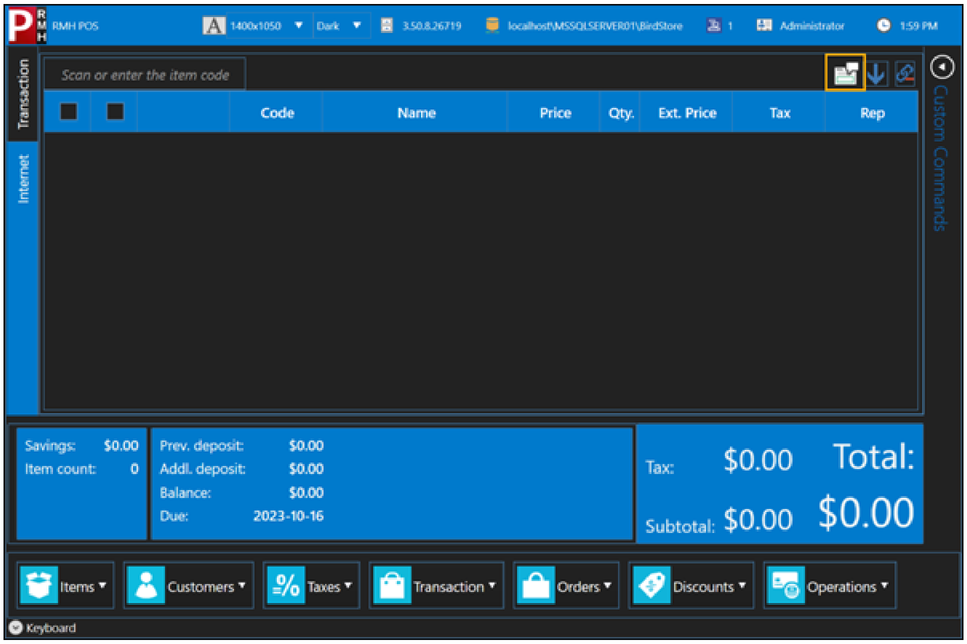
If some items from the quote are available immediately, customers have the option to pick up those items and return at a later time to pick up the remaining items. However, customers must pay the total amount for all items they pick up. Quote can also be converted to work orders if store employees require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

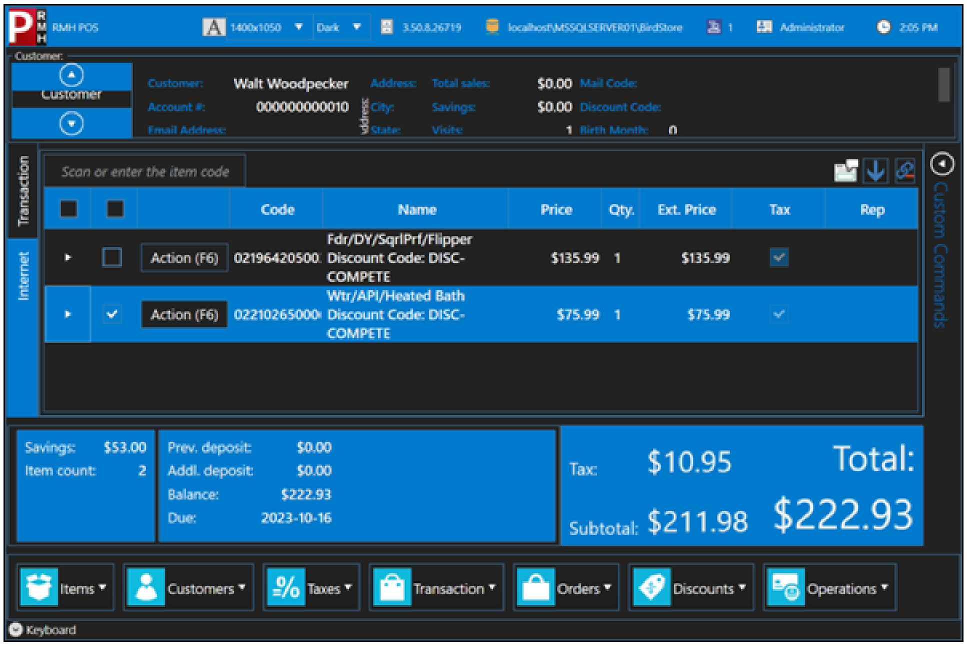
3. (Optional) To select the customer, do one of the following:

   - 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.

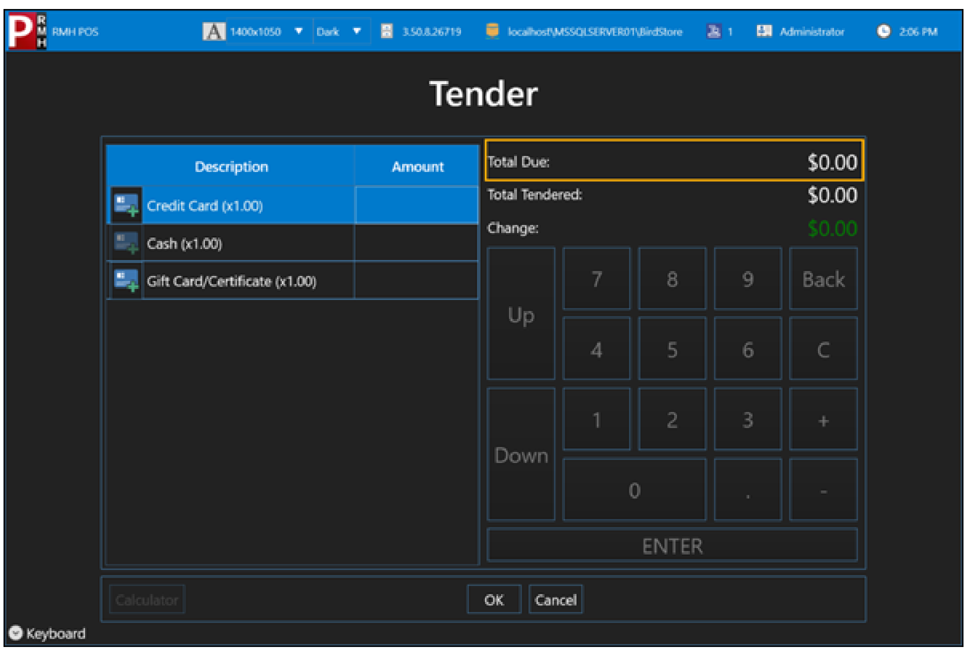
4. Enter all of the items in the quote.

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!

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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**.

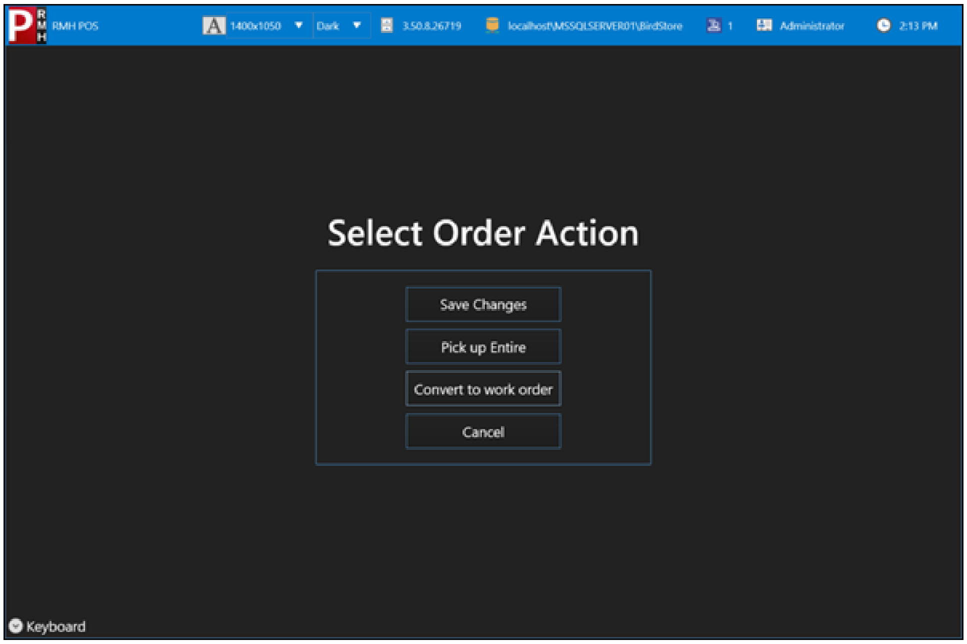
4. To select the customer's quote, do one of the following:

   - 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.

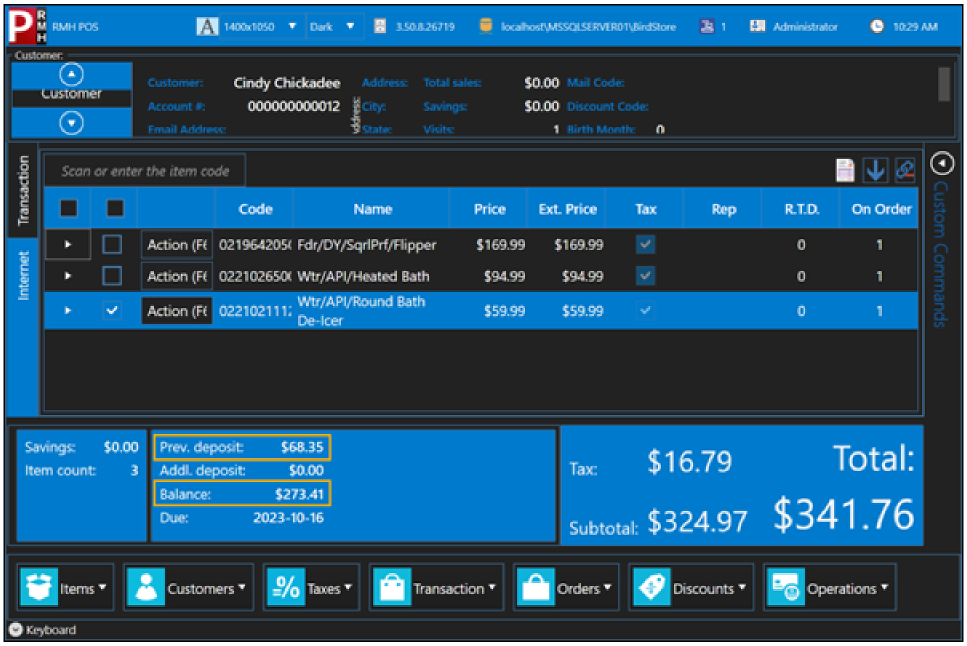
8. Tap **OK**.

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

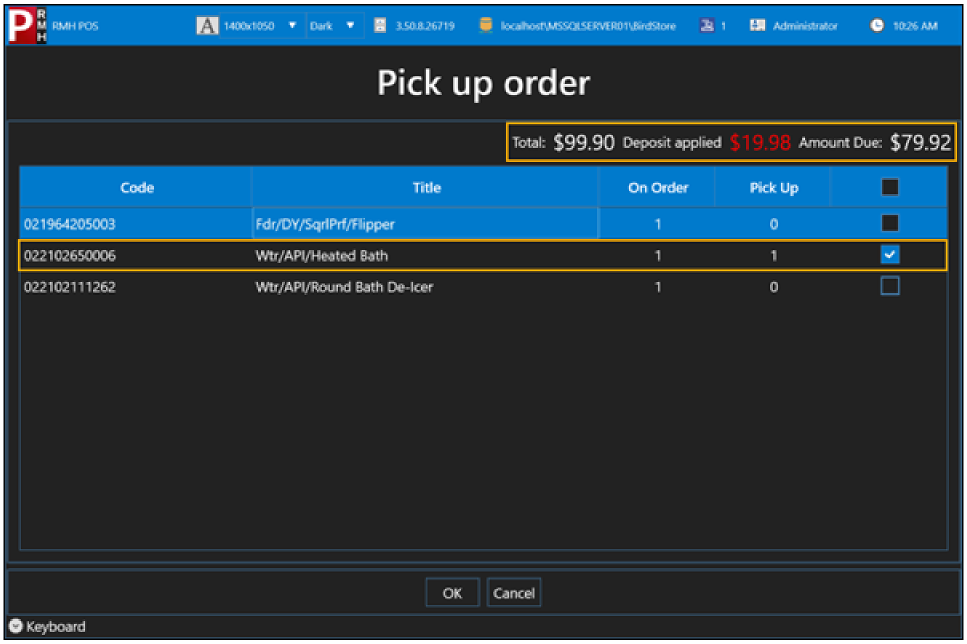
About work orders

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.

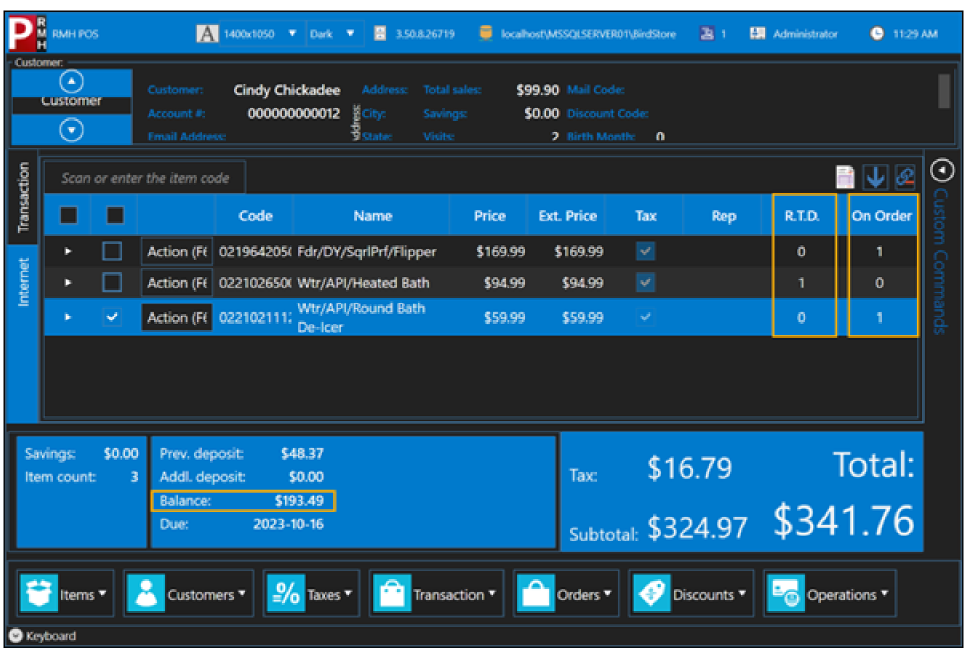
Depending on your store's policies, customers may be required pay a deposit on work orders. If the customer pays a deposit, when they return to pick up the work order you will need to collect the balance owing.



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.

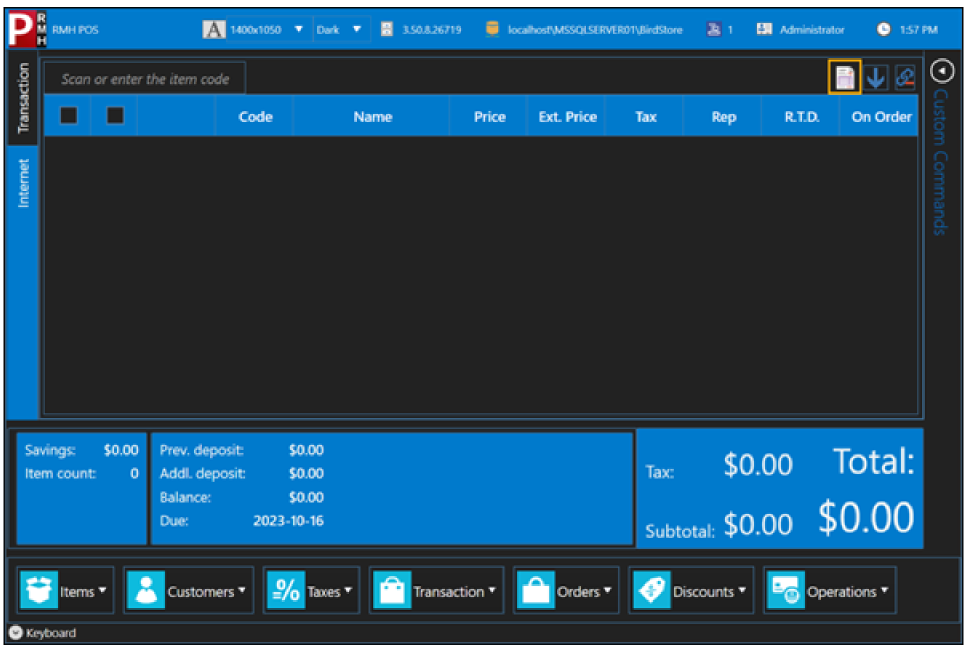


Creating work orders

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**.

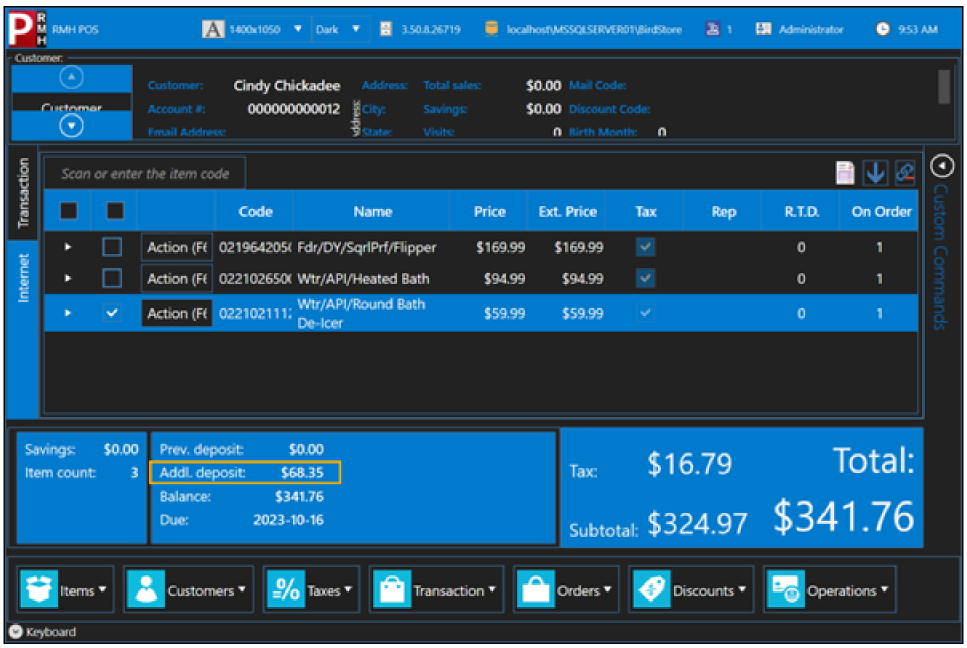
3. (Optional) To select the customer, do one of the following:

   - 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

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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.

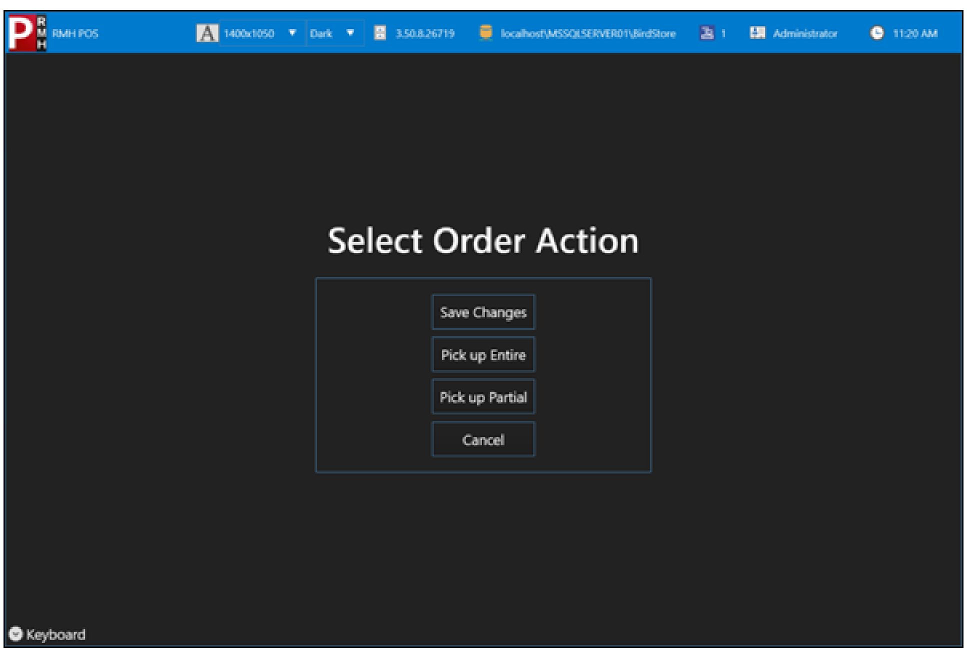
1. (Optional) Tap **Customers | Lookup Customer** or press **F7**.

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.

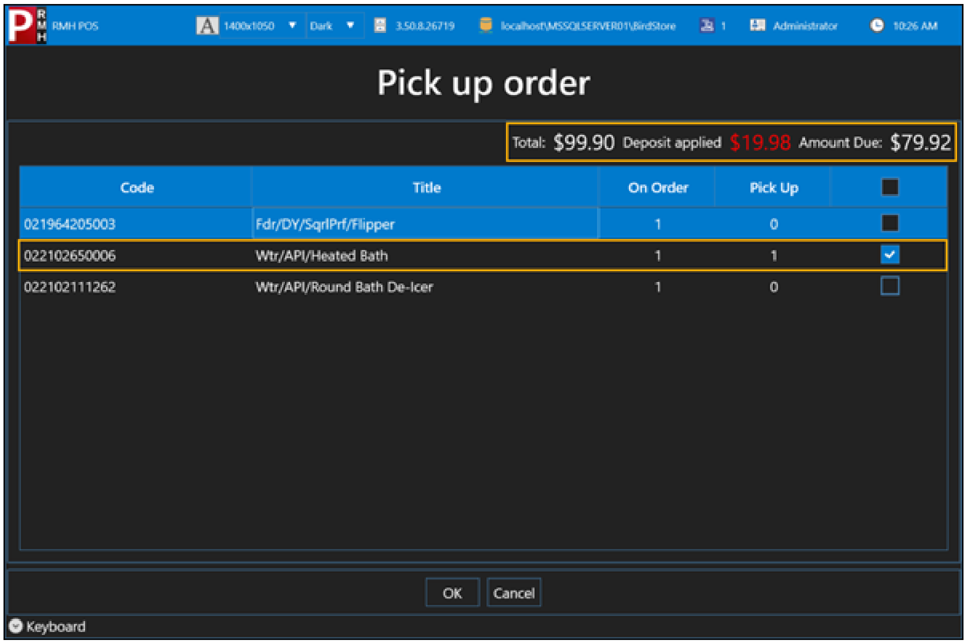
The customer's information displays in the **Customer** pane at the top of the POS screen.

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:

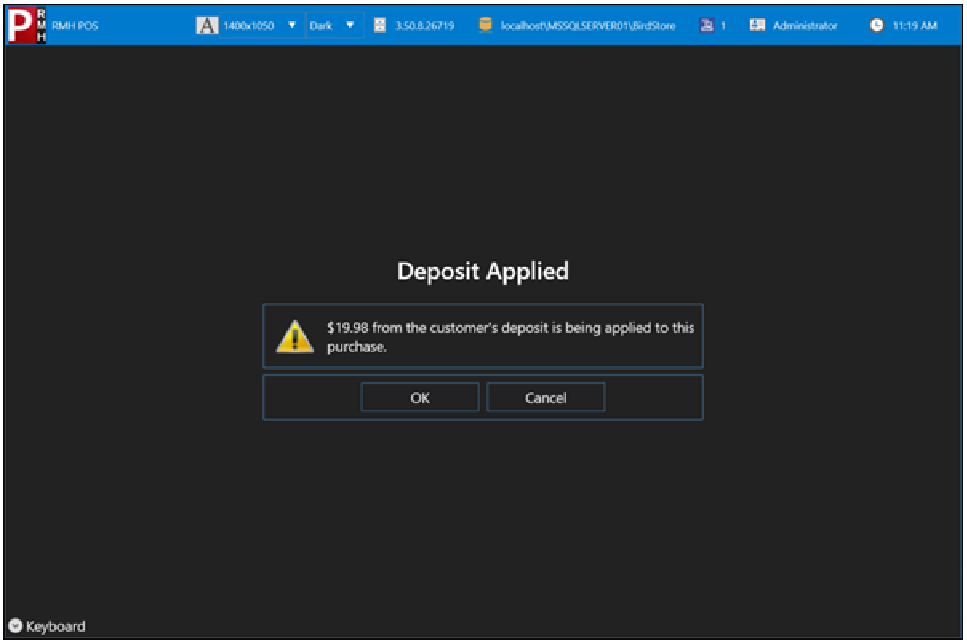
   a. Tap the items the customer is picking up to select them.



   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.

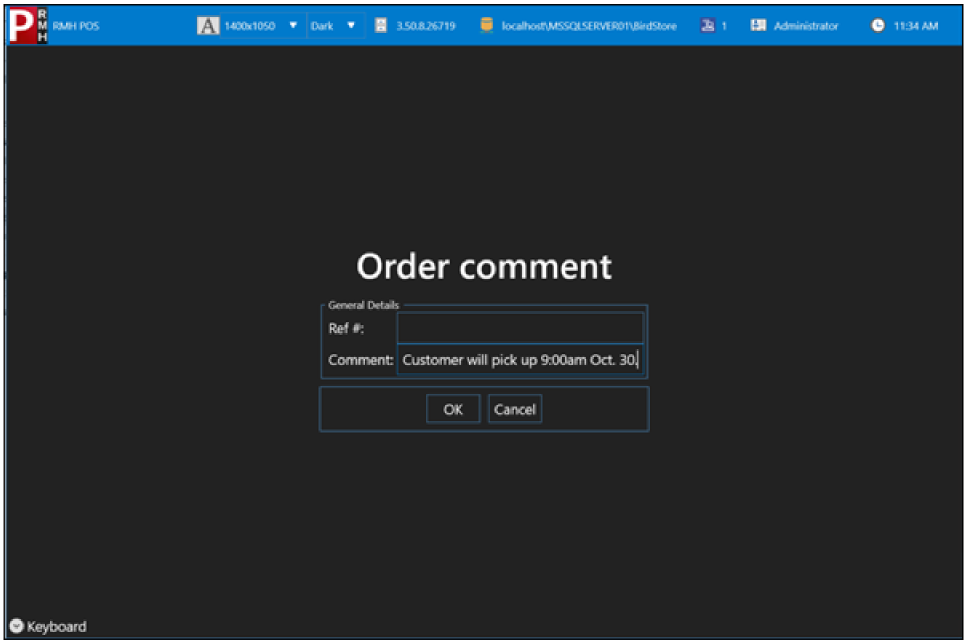
Adding a comment to an order

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

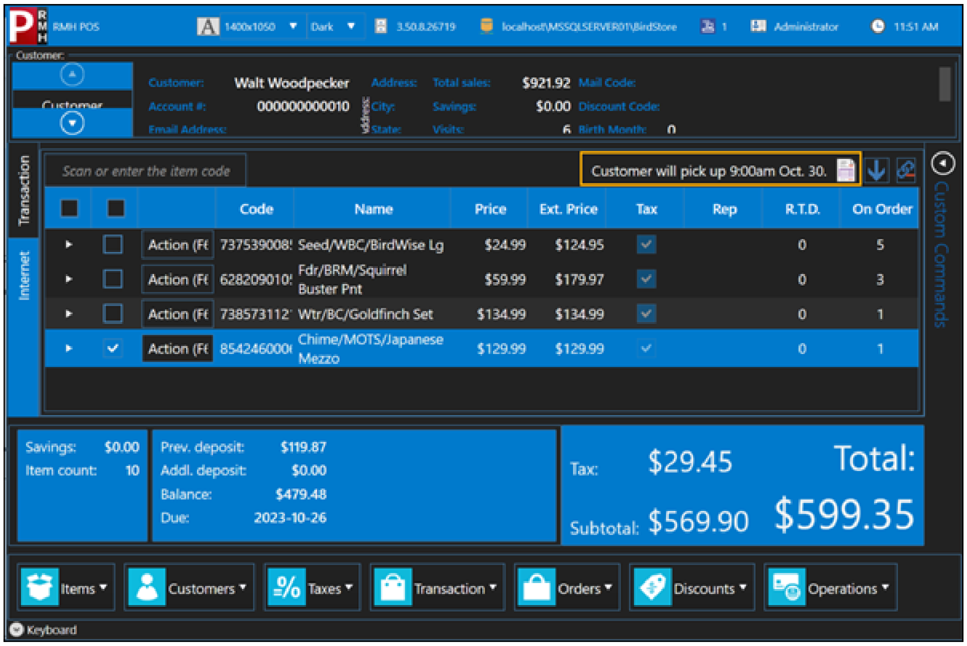
Customer will pick up 9:00am Oct. 30.

Item	Description	Amount
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.



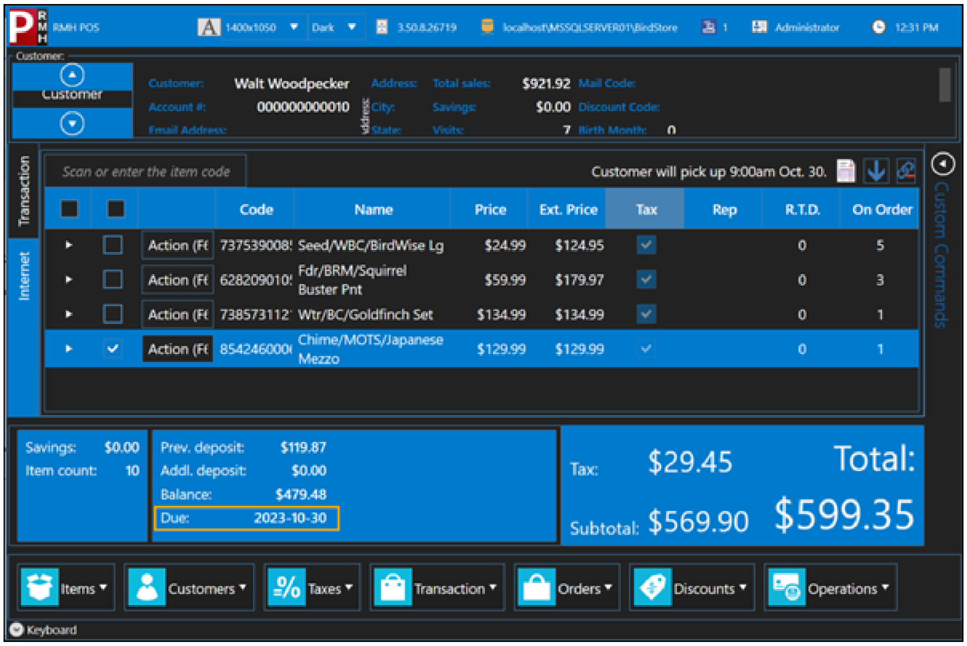
Adding a due date to an order

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.

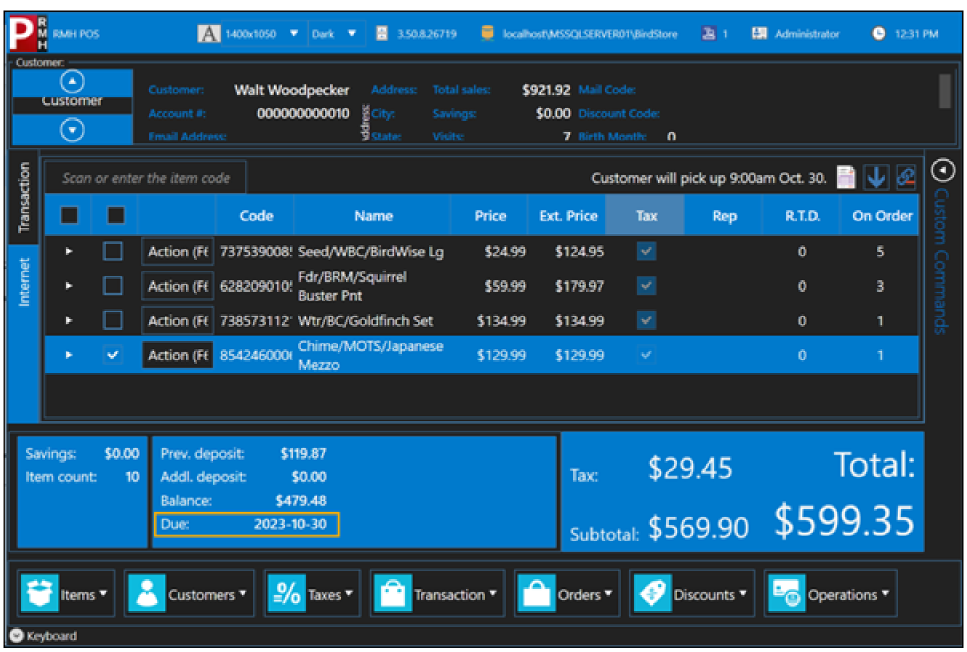
   You can enter the date manually or click the calendar icon and select a date.



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

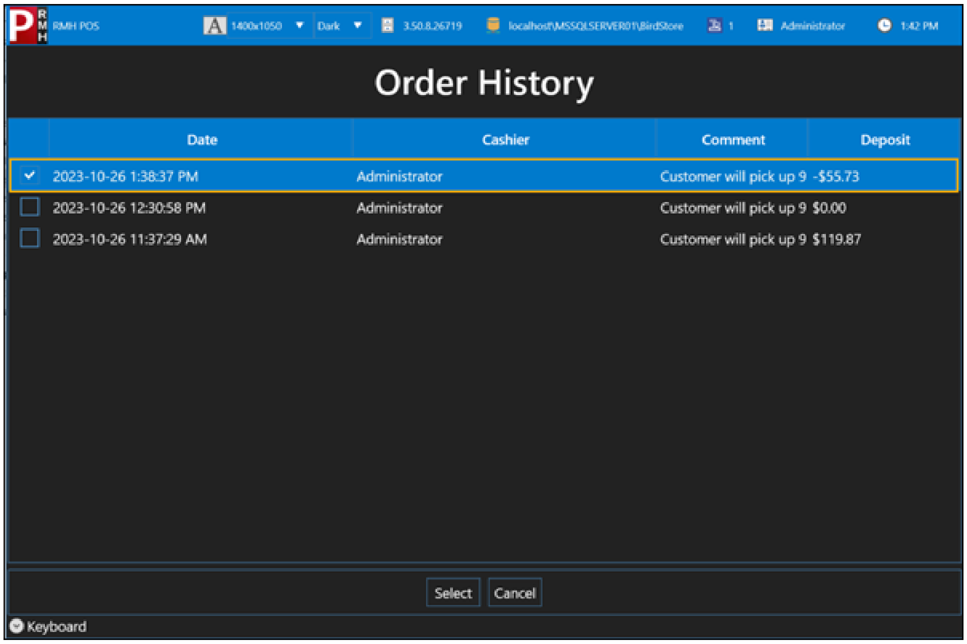
You can look up all transactions that are part of an open order (such as deposits and partial pick ups).

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.

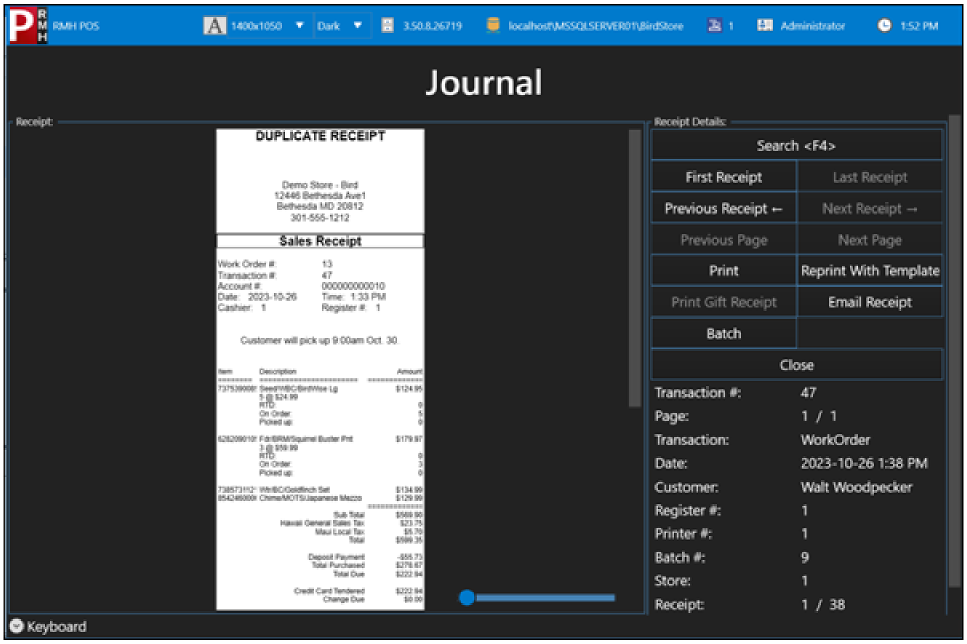
   The customer's information displays in the **Customer** pane at the top of the POS screen.
3. Tap **Orders** | **Recalls** and select one of the following:
   - Recall a Work Order
   - Recall a Layaway
4. To select the order, do one of the following:
   - Tap the order once and tap **Add**.
   - Tap 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.

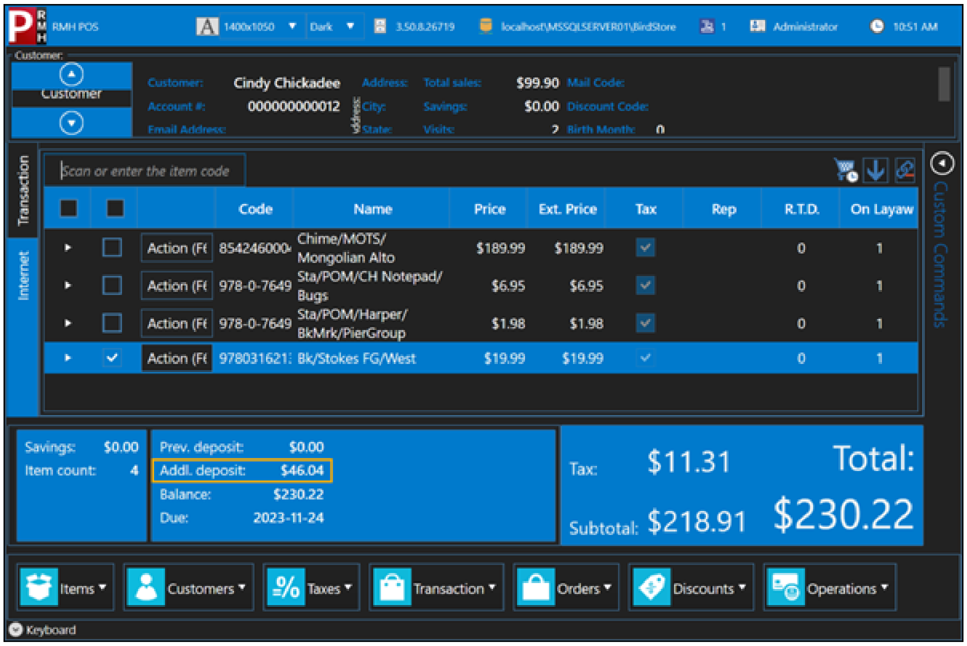
Working with layaways

About layaways

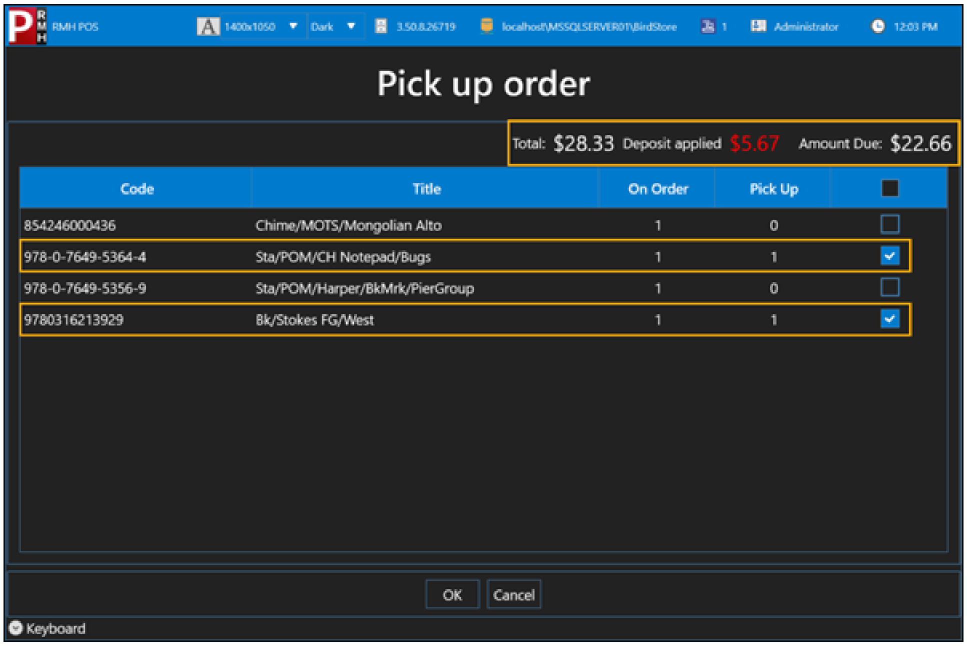
Layaways are a specialized type of transaction where a store agrees to hold (or "lay away") items for a customer until the customer is able to pay for them.

Depending on your store's policies, customers may be required pay a deposit on lay-ways. The customer may also return to the store to make incremental payments on lay-aways. 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.

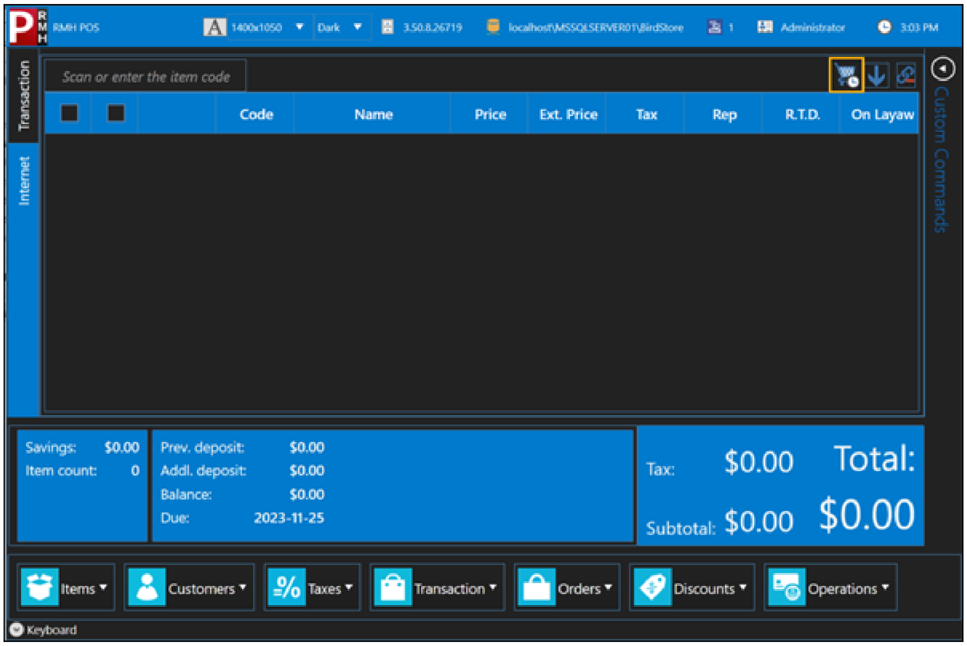


If the customer has already picked up part of the layaway order, you will see the quantity picked up in the **R.T.D.** (received to date) column. You will see the quantity remaining to be picked up in the **On Order** column. The **Balance** owing is the total amount of the layaway order minus any deposits 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**.

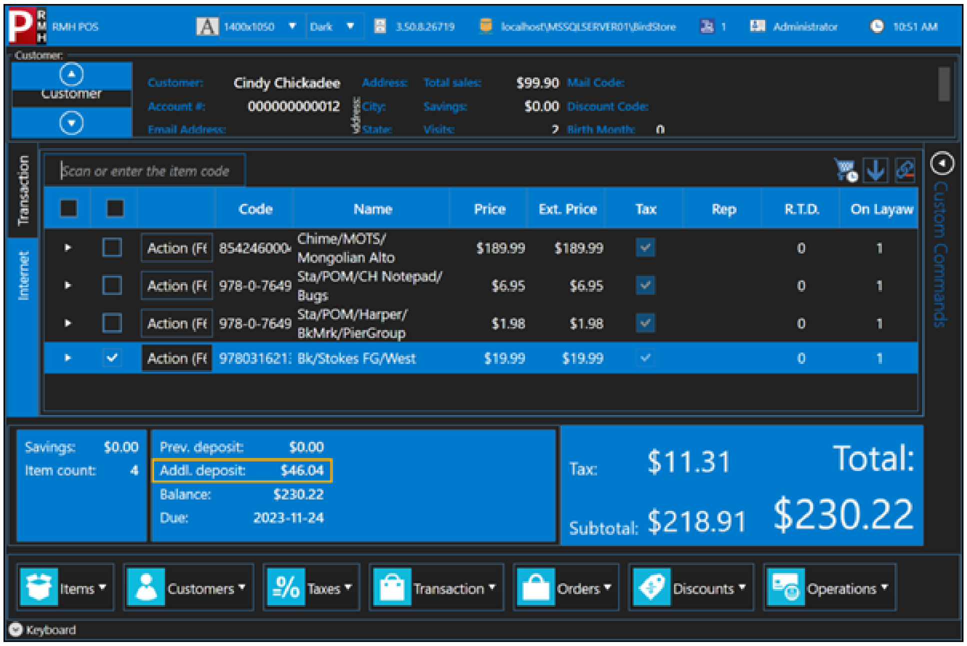
3. To select the customer, do one of the following:

   - 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**.

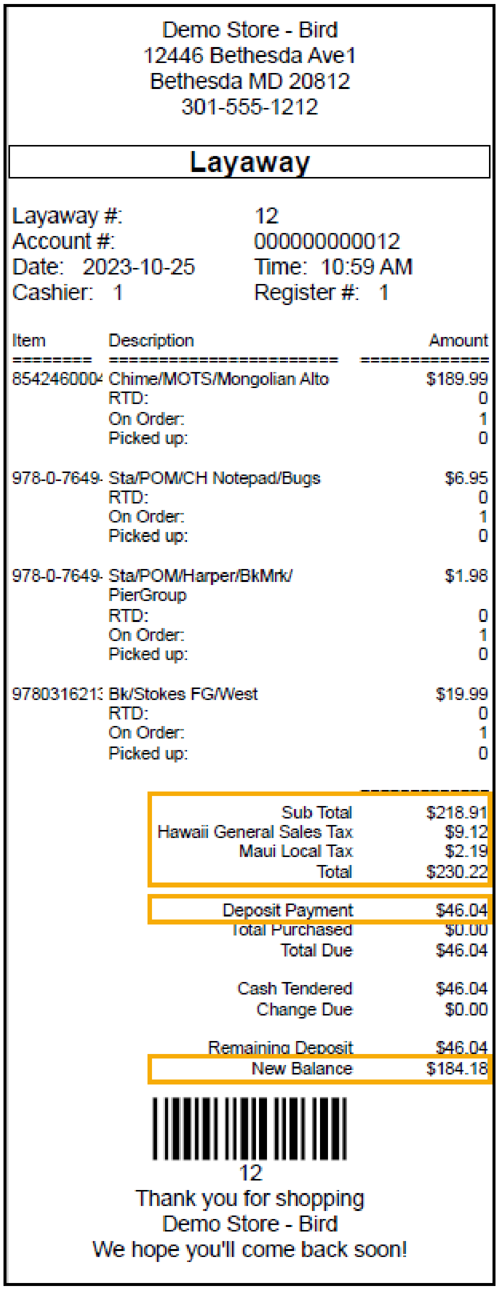
6. Enter the amount next to the appropriate tender type.

> **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/ PierGroup	$1.98
	RTD:	0
	On Order:	1
	Picked up:	0
978031621	Bk/Stokes FG/West	$19.99
	RTD:	0
	On Order:	1
	Picked up:	0

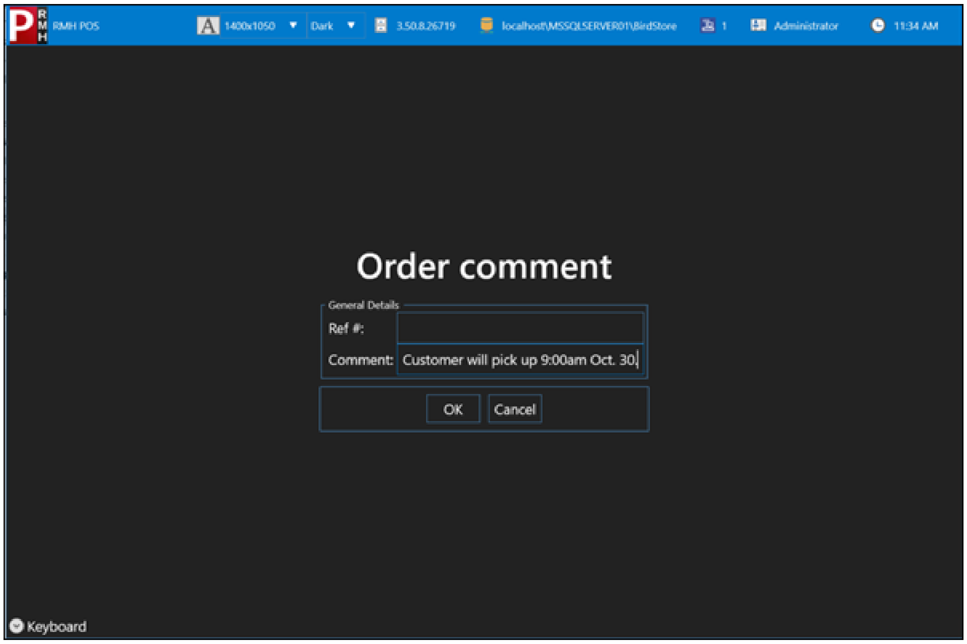
Sub Total	$218.91
Hawaii General Sales Tax	$9.12
Maui Local Tax	$2.19
Total	$230.22
Deposit Payment	$46.04
Total Purchased	$0.00
Total Due	$46.04
Cash Tendered	$46.04
Change Due	$0.00
Remaining Deposit	$46.04
New Balance	$184.18

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

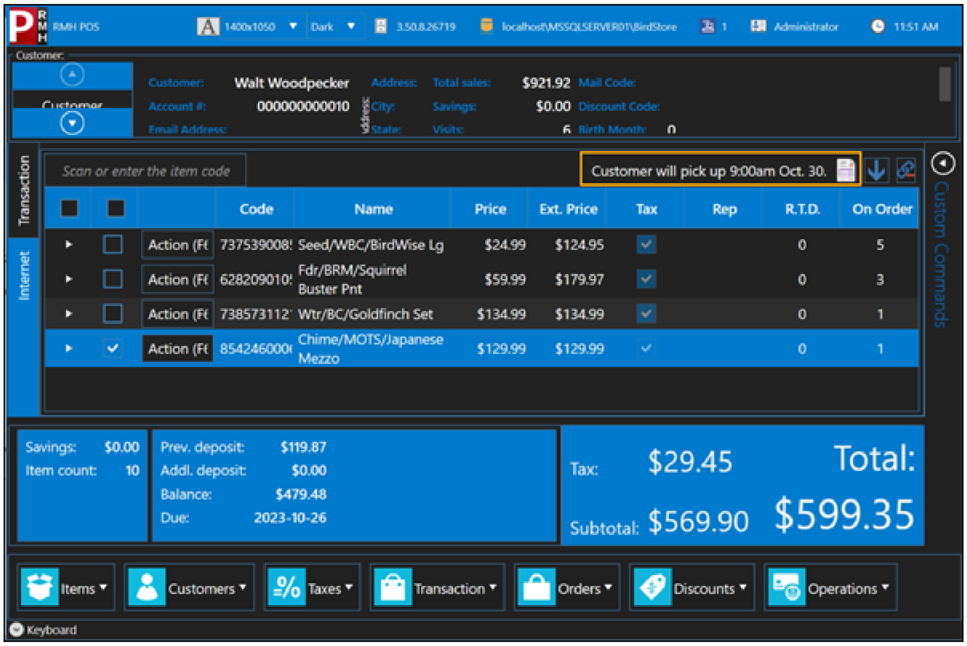
Customer will pick up 9:00am Oct. 30.

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.



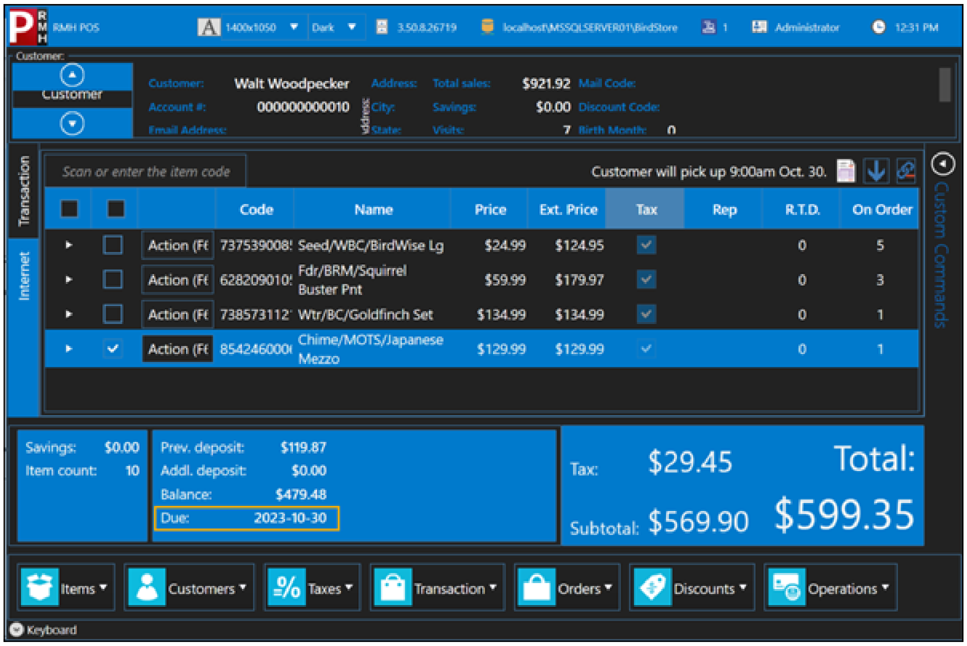
Adding a due date to an order

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.

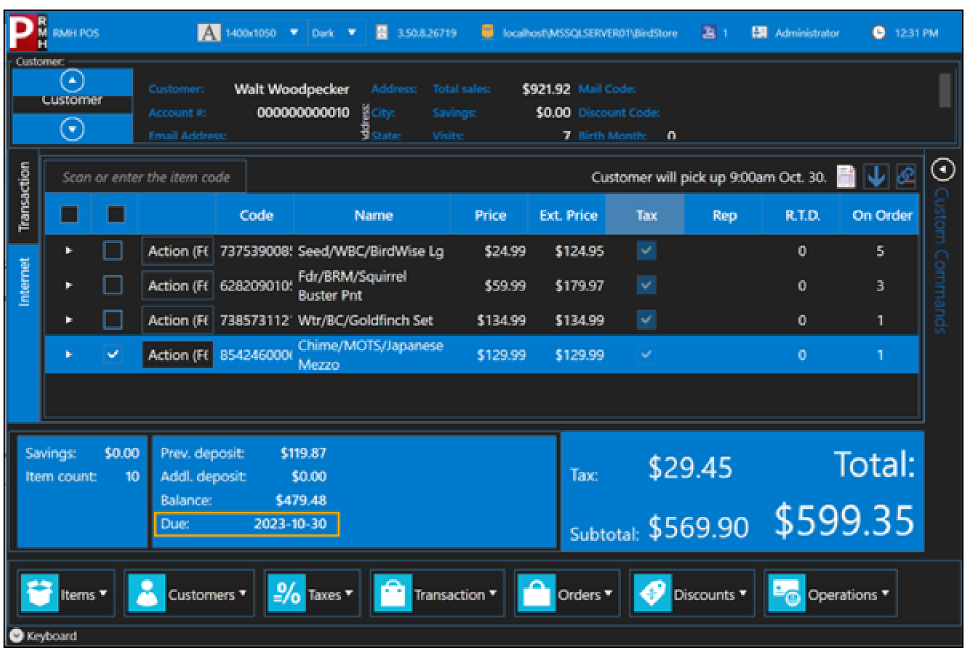
   You can enter the date manually or click the calendar icon and select a date.



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

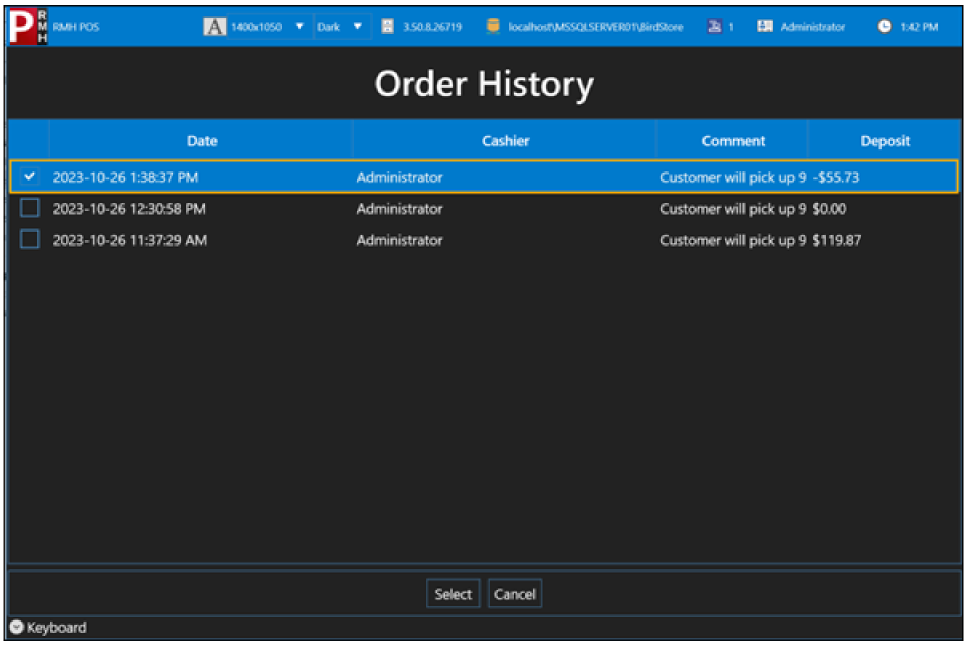
You can look up all transactions that are part of an open order (such as deposits and partial pick ups).

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.

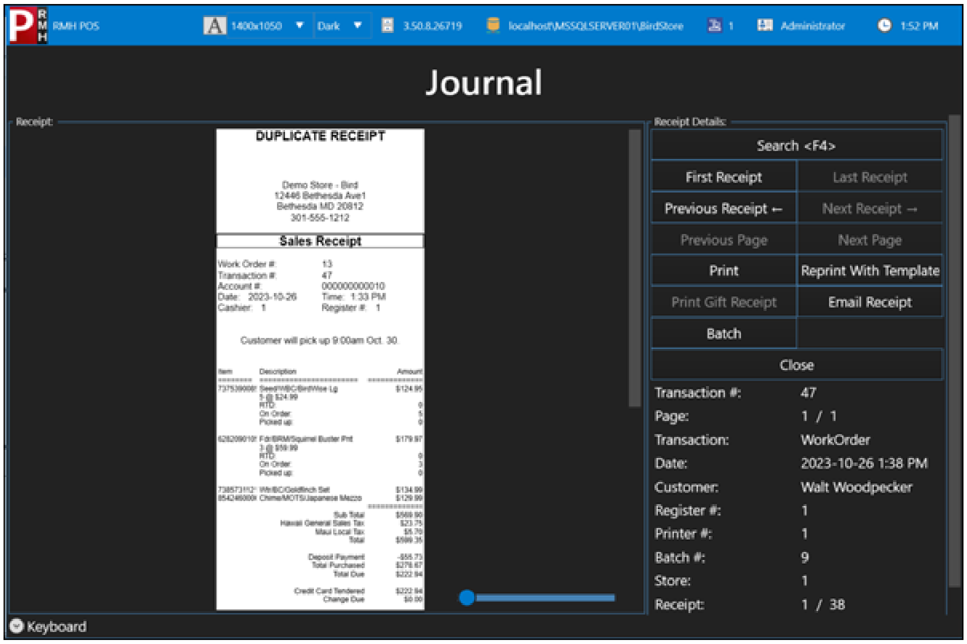
   The customer's information displays in the **Customer** pane at the top of the POS screen.
3. Tap **Orders** | **Recalls** and select one of the following:
   - Recall a Work Order
   - Recall a Layaway
4. To select the order, do one of the following:
   - Tap the order once and tap **Add**.
   - Tap 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 customer'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**.

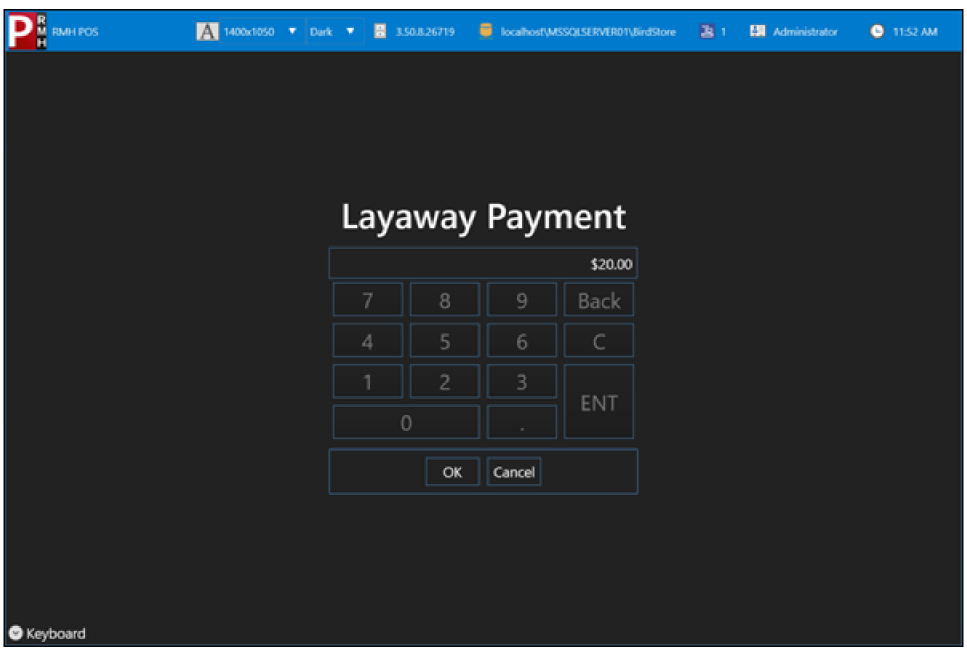
4. To select the customer's layaway order, do one of the following:

   - 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.



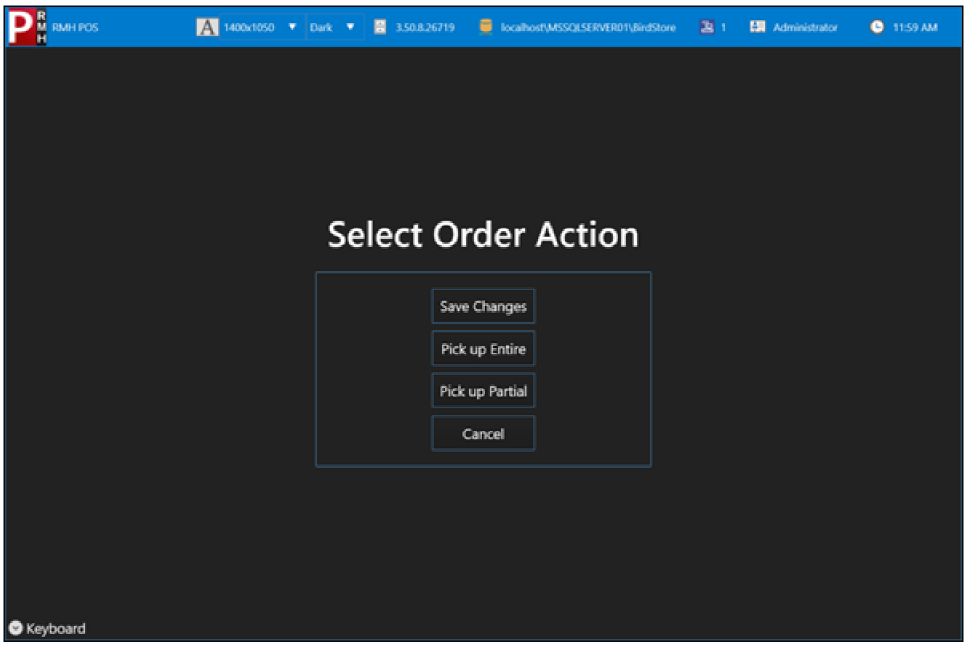
   c. Tap **OK**.

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

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

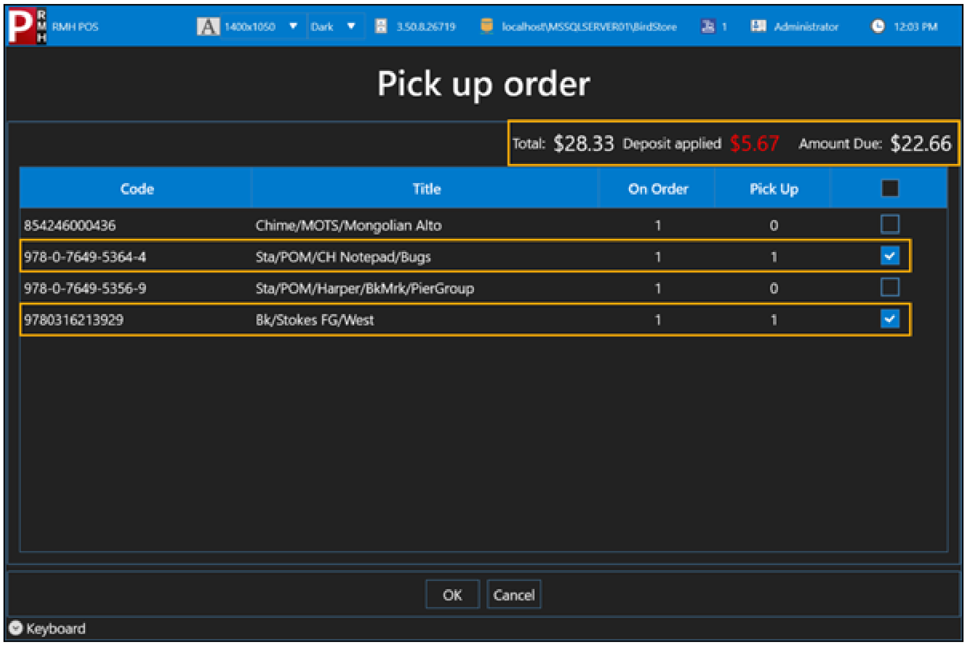
b. From the **Select Order Action** screen, tap one of the following:

- Pick up Entire
- Pick up Partial



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

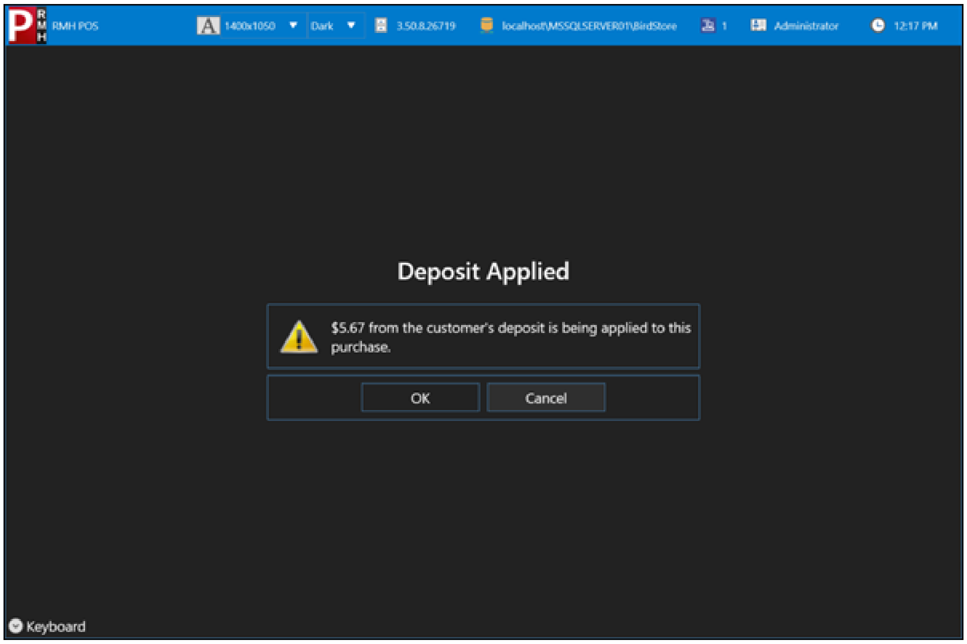
a. Tap the items the customer is picking up to select them.



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

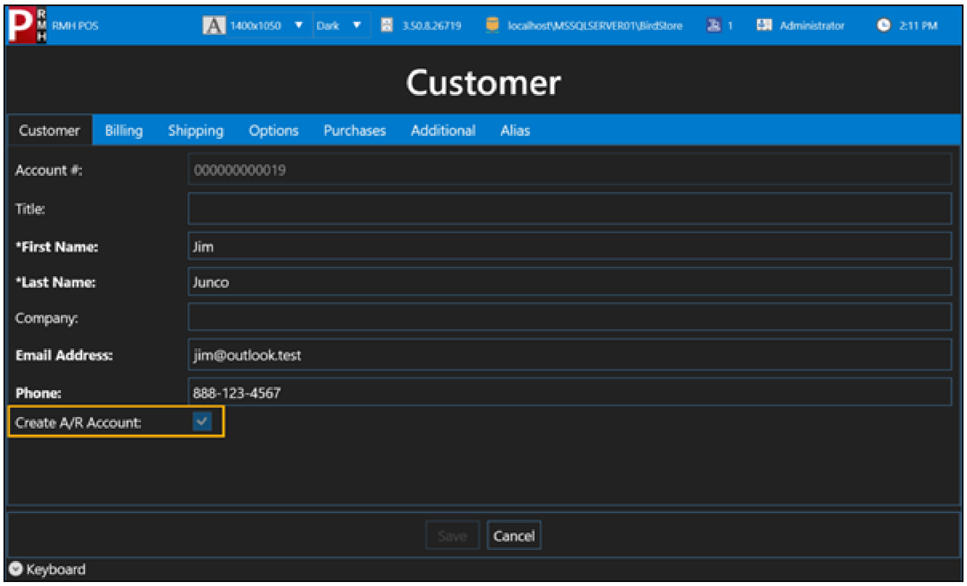
Some stores offer **store credit** to approved people or companies. With store credit, a person or company can make purchases up to their credit limit and pay for those purchases at a later date, like a credit card. They also agree to payment terms such as payment due dates and minimum payment amounts.

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.

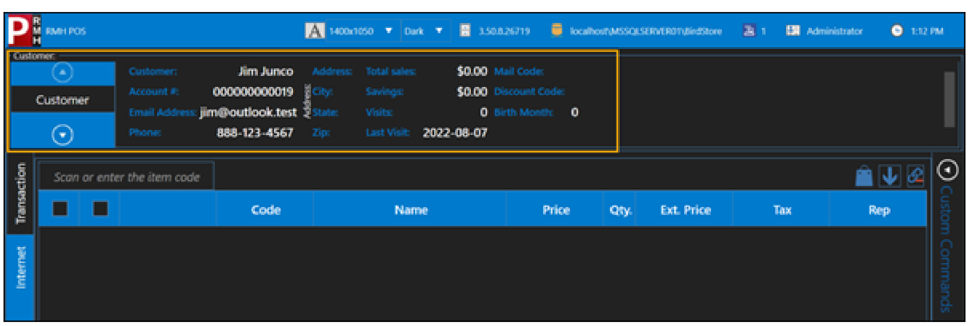
To make a purchase on store credit, the person or company must:

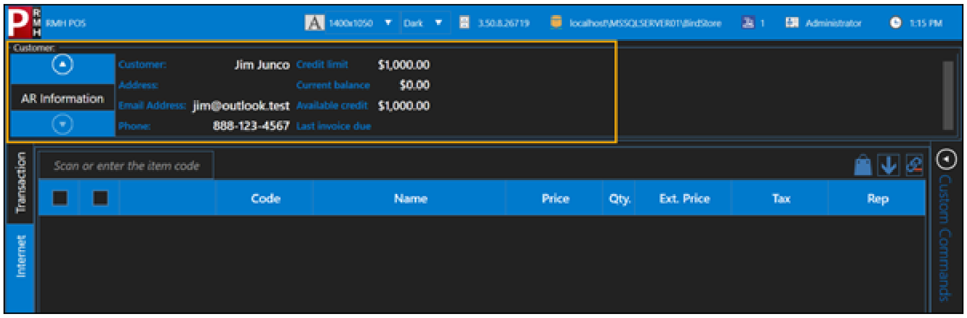
- Be a customer in POS.
- Have an AR account in POS.

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

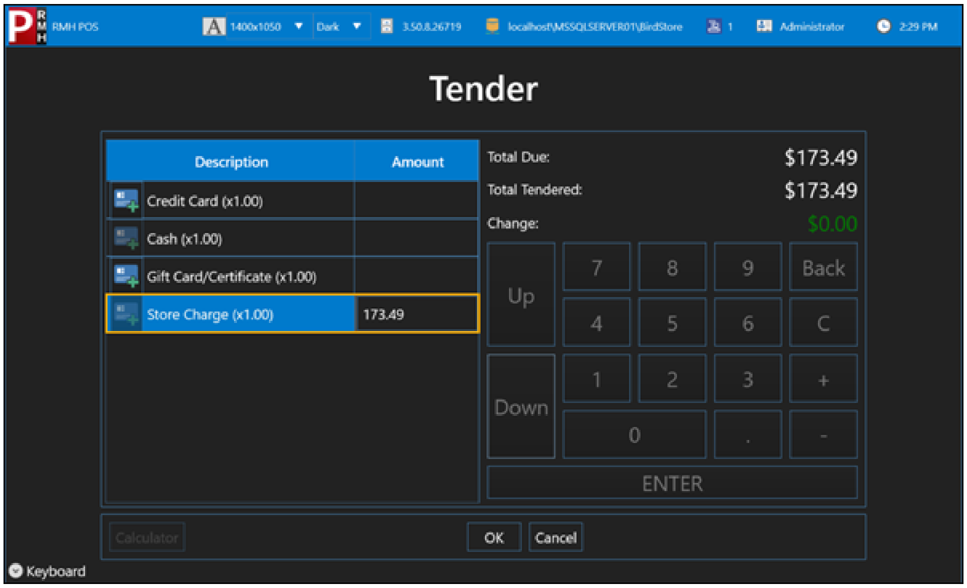
1. Look up the customer. Refer to Looking up customers for more information.

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.



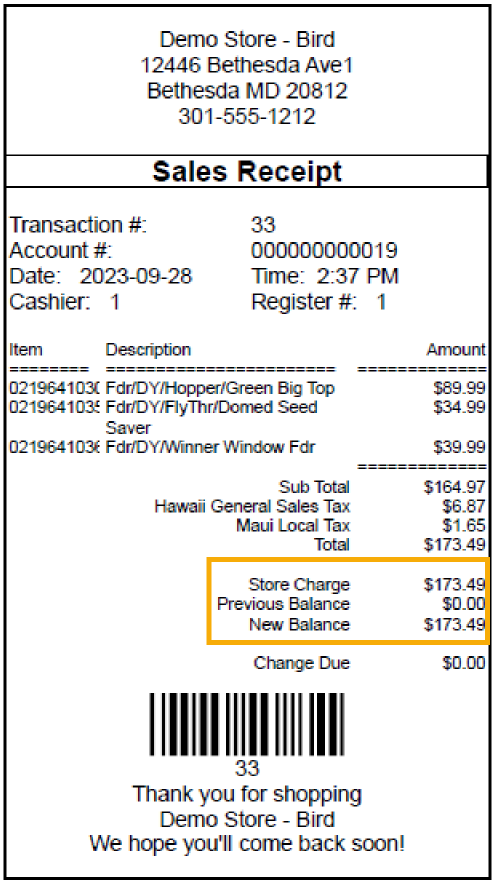
5. Tap **OK**.

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 Saver	$34.99
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

33
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 Looking up customers 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.

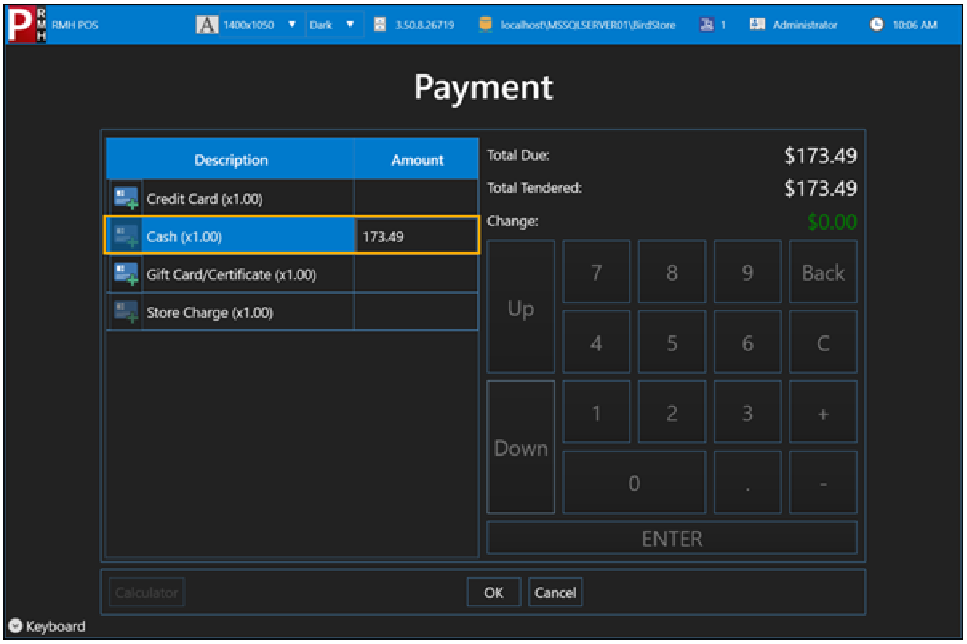
6. (Optional) Tap in the **Reference** field and enter the statement number.

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.

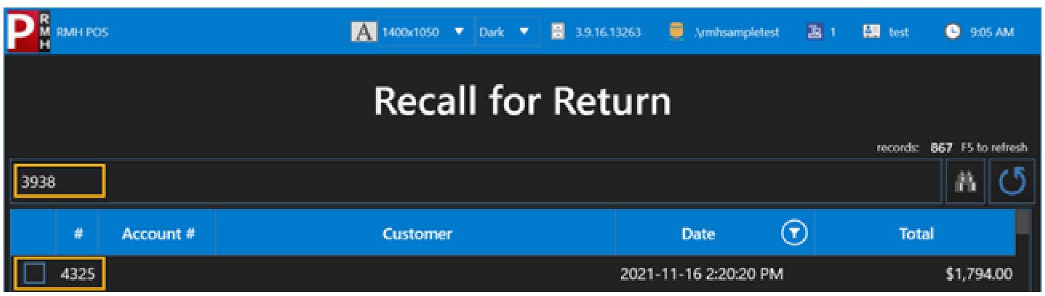
1. On the POS transaction screen, do one of the followinsg:

- 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:

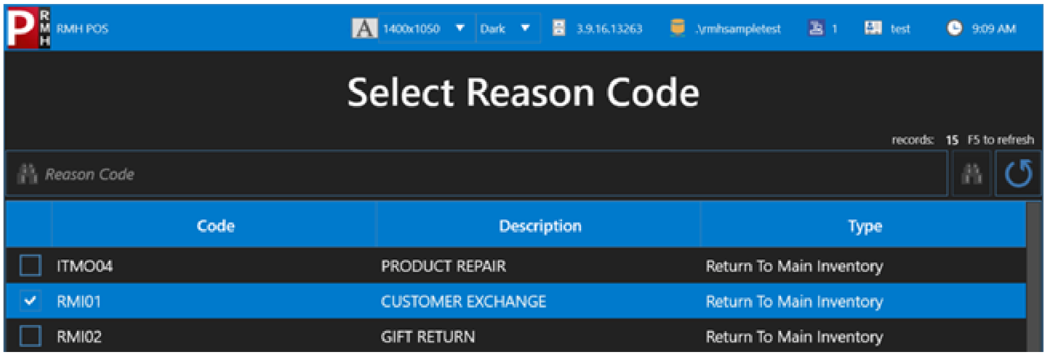
- If the transaction was completed recently, scroll down and select the transaction number from the list; or



- 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.

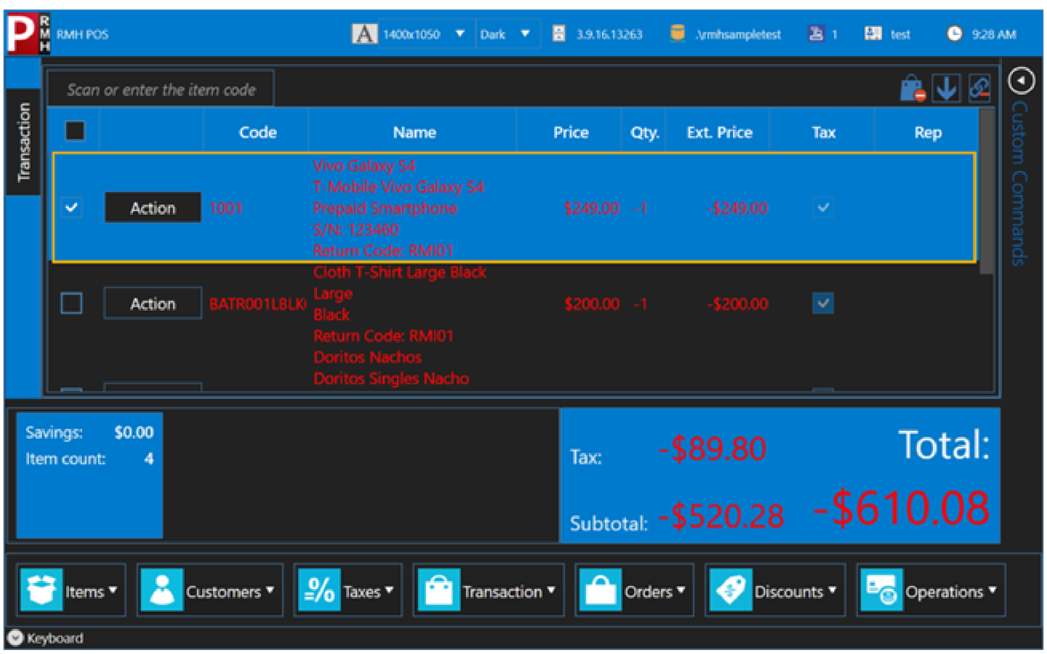
3. Tap **Add**.

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**.

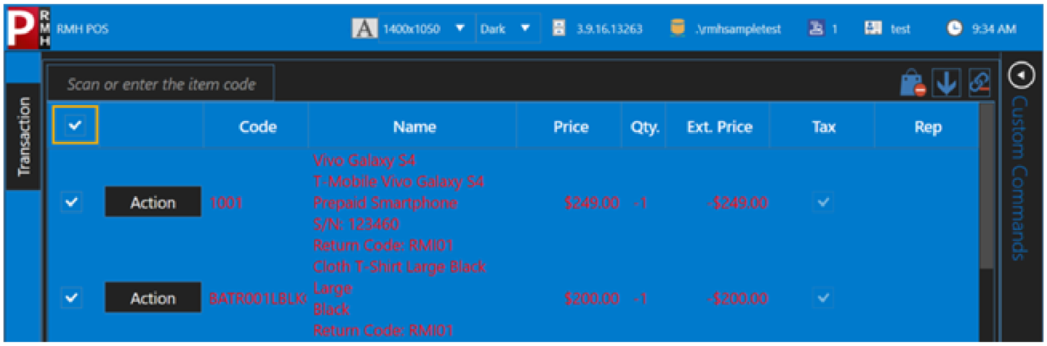


5. On the POS transaction screen, the items that were purchased in the recalled transaction are listed in red. Do one of the following:

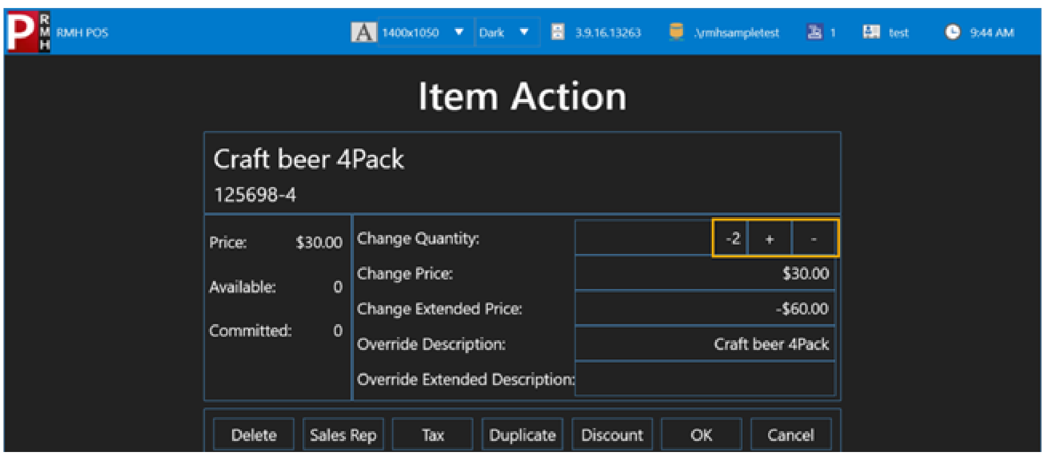
 - If the customer wants to return a specific item or items, click the check box next to the items. It there are multiple items in the transaction, scroll through the entire list to confirm that you have selected the correct item or items.



 - 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 end-ing 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 automatically 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 Return Code: RMI01 -2 @ $30.00	-$60.00
	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!

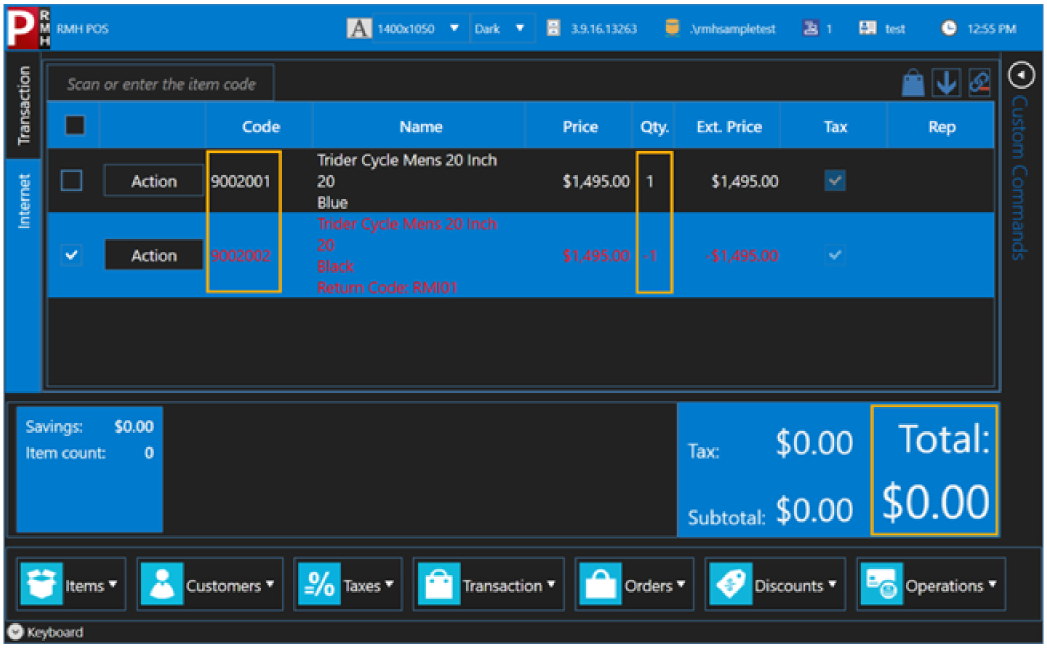
Processing exchanges

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.

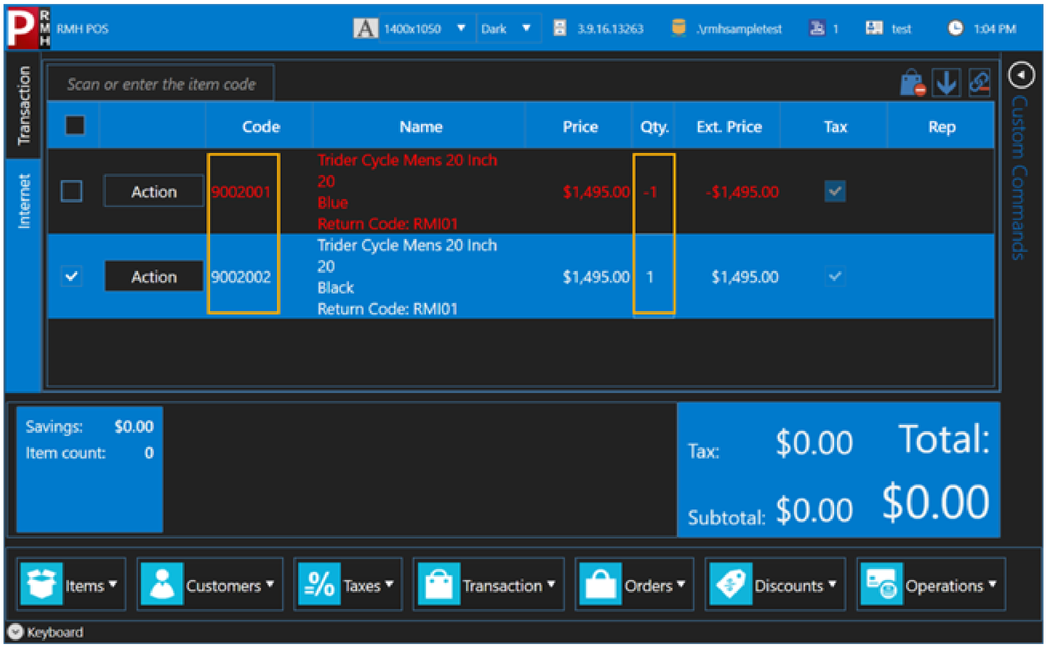
> **Pre-requisites:** Follow your store's policies and procedures for processing returns.

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.



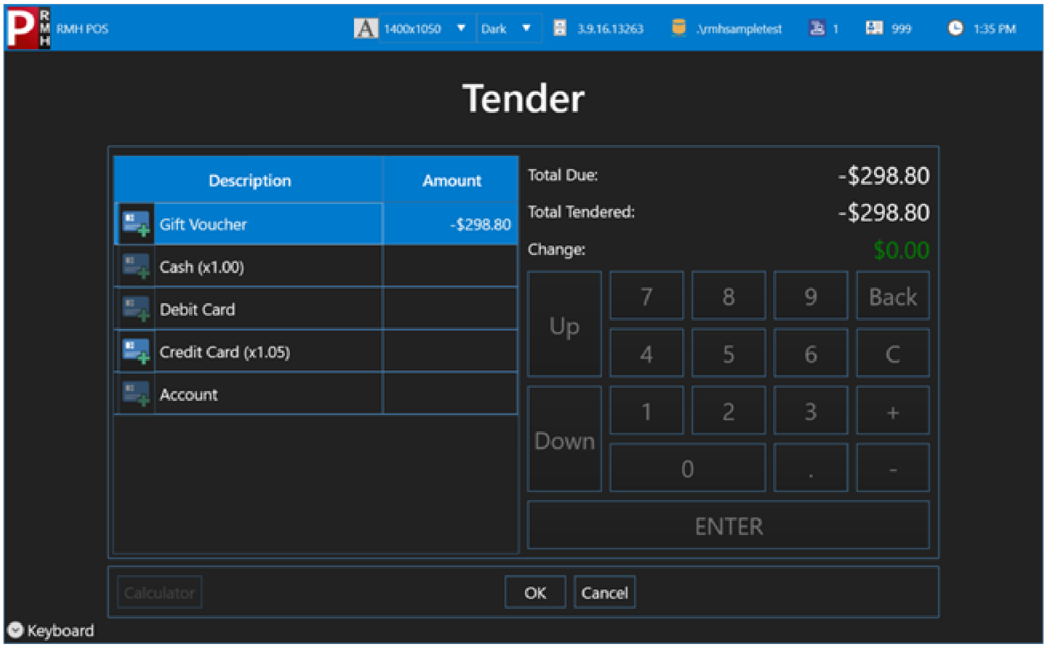
Processing refunds to a voucher

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.

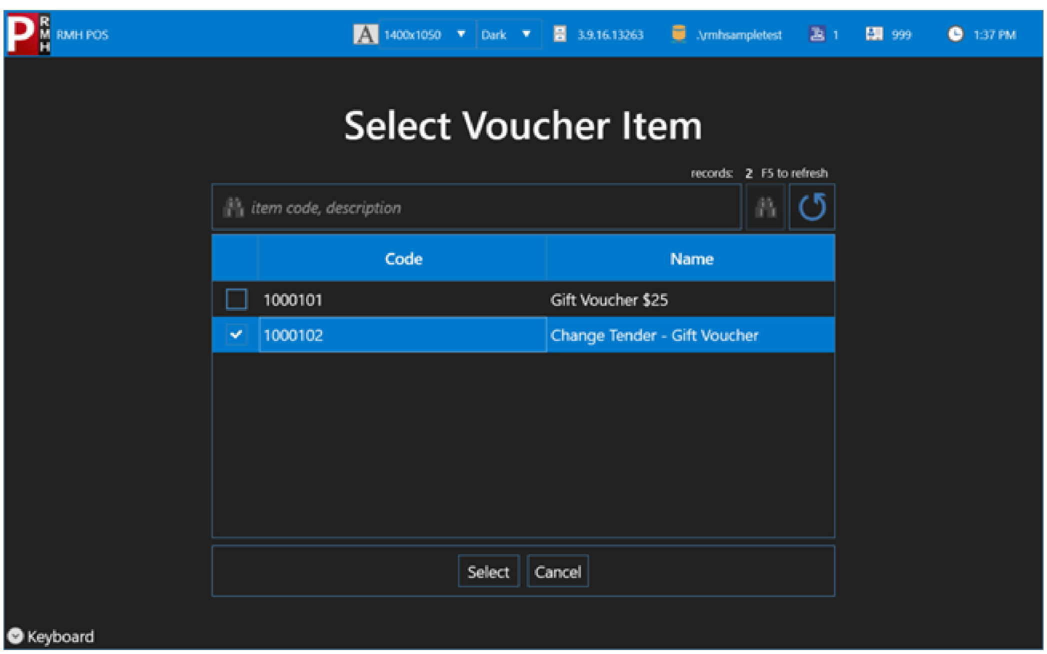
2. Enter the refund amount next to the **Voucher** tender type.

   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**.

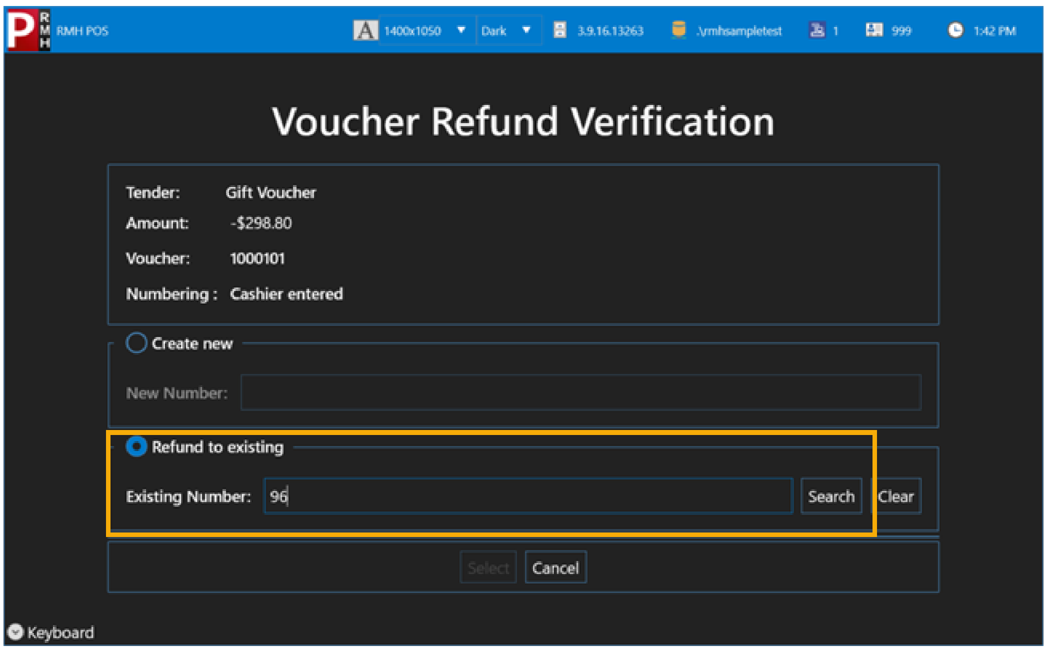
4. If your store sells more than one type of voucher, on the **Select Voucher Item** screen tap the type of voucher and tap **Select**.



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.

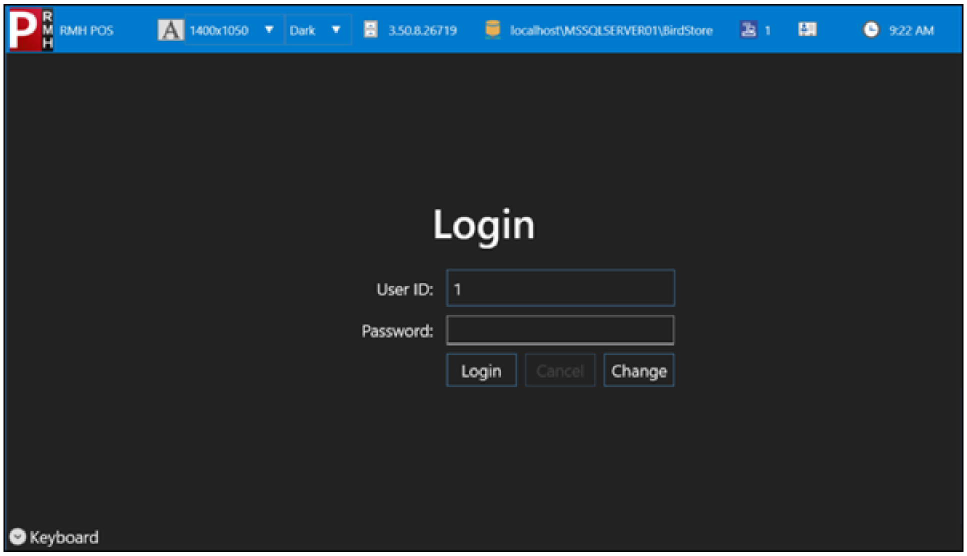
To punch out:

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**.



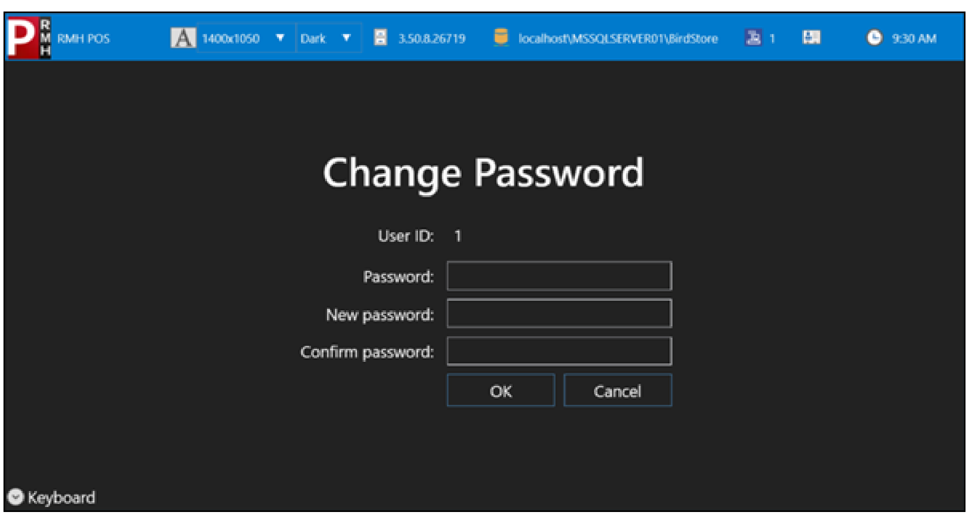
3. Tap **Change**.

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.

Commands reference guide

The following commands can be used to program the functionality of both POS Task Pads and Custom POS Buttons. You must configure Task Pads and Custom Buttons in Store Manager.

Starting with release 3.11.0 you can program Task Pads or Custom Buttons to execute a chain of commands when the button is clicked by adding a semicolon (;) between commands. For example, you might create a chain of commands to discount a transaction (command 1) and then automatically select a discount reason code (command 2). There is no limit to the number of commands in a chain. However, the commands should be chained together to follow a logical transaction process.

Batch Commands

Use batch commands to perform various batch operations, such as entering opening and closing amounts, viewing the X report, printing X, Z, and ZZ reports, and performing a blind closeout.

Command	Description
Batch_CloseCommand	Closes the current batch. This is the same as a blind closeout. No parameters.
Batch_EnterClosingAmountsCommand	Invokes the **Closing Amounts** dialog. No parameters.
Batch_Enter-	Invokes the **Opening Amounts** dialog.

Command	Description
OpeningAmountsCommand	No parameters.
Batch_PerformBlindCloseoutCommand	Performs a blind closeout. No parameters.
Batch_ViewXReportCommand	Displays the X report. No parameters.

Charge Commands

Use charge commands to add charges to POS transactions.

Command	Description
Charge_AddNoTemplateCommand	Adds a charge without using a charge template (defined in Store Manager under **Setup** | **Inventory/Purchasing** | **Charges**). The command takes an optional parameter of the charge code and price, separated by a pipe (|): {Charge Code}|{Price}. If a parameter is not provided, the command invokes the **Charge Lookup** dialog and prompts for the price. **Example:**

Command	Description
	Adds charge code and price: `Charge_AddNoTemplateCommand "CH|15.10"`
Charge_AddCommand	Adds a charge to the transaction using a charge template (defined in Store Manager under **Setup** | **Inventory/Purchasing** | **Charges**). The command takes an optional parameter of the charge code and price, separated by a pipe (|): {Charge Code}|{Price}. If a parameter is not provided, the command invokes the **Charge Lookup** dialog and prompts for the price. **Example:** Adds charge code and price: `Charge_AddCommand "CHARG1|15.10"` Adds charge code but prompts for the price:

Command	Description
	`Charge_AddCommand "CHARG1"`

Customer Commands

Use customer commands are used to perform various customer-related operations.

Command	Description
Customer_AddCommand	Adds a customer to the transaction. Requires the mandatory parameter {Customer Account Number}. **Example:** `Customer_AddCommand "000005"`
Customer_ClearCommand	Clears the current customer from the transaction. No parameters.
Customer_DisplayHistoryCommand	Displays a dialog with the current customer's purchase history. No parameters.
Customer_EditCommand	Invokes the **Customer** dialog where you can edit the customer. No parameters.
Customer_LookupCommand	Adds a customer to the transaction.

Command	Description

	The command takes an optional parameter of {Customer Account Number}.
	
	If a parameter is not provided, or the customer account number is not found, the command invokes the **Customer Lookup** dialog with a list of customers fitting the search criteria.
	
	Example:
	
	Adds a customer with account number “000005” to the transaction:
	
	`Customer_LookupCommand "000005"`
	
	Invokes the Customer Lookup dialog with the search criteria "Jon":
	
	`Customer_LookupCommand "Jon"`

Customer_NewCommand	Invokes the **Create New Customer Wizard** dialog where you can create a new customer. No parameters.
Customer_PaymentOnAccountCommand	Invokes the **Account Payment** dialog for the selected accounts receivable customer. No parameters.

Command	Description
Customer_SelectShip-pingAddressCommand	Invokes the **Select Shipping Address** dialog where you can add a shipping address for the selected customer. No parameters.

Discount Commands

Use discount commands to apply various discounts and price levels on the selected item, all items in the transaction, or the entire transaction.

Command	Description
Discount_InvokeDis-countMenuCommand	Invokes the **Discount Menu** dialog. No parameters.
The following commands apply a discount to **all items** that are currently in the trans-action. **Note:** Discounts are not applied to items that are added after an all items command is used.	
DiscountAllItems_SetNoDis-countCommand	Removes any discount applied to all items currently in the transaction. No para-meters.
DiscountAllItems_SetA-mountFromCurrentPriceCommand	Applies a dollar amount discount from the current price to all items currently in the transaction.

Command	Description

	The command takes an optional parameter {Discount Amount}. If a parameter is not provided, the command invokes the **Discount** dialog and prompts for the dollar amount.
	
	Starting with release 3.11.12, the command also takes an optional parameter {Reason Code}. If the {Reason Code} parameter is provided the reason code is applied automatically to the item or transaction. The {Discount Amount} and {Reason Code} must be separated by a pipe (|).
	
	Example:
	
	Apply a discount of $10 dollars to the current price for all items currently in the transaction:
	
	`DiscountAllItems_SetAmountFromCurrentPriceCommand "10"`
	
	Apply the RC01 reason code:
	
	`DiscountAllItems_SetA-`

Command	Description
	`mountFromCurrentPriceCommand "10|RC01"`
DiscountAllItems_SetPer-centFromCurrentPriceCommand	Applies a percentage discount from the current price to all items currently in the transaction. The command takes an optional parameter {Percentage Discount}. If a parameter is not provided, the command invokes the **Discount** dialog and prompts for the percentage. Starting with release 3.11.12, the command also takes an optional parameter {Reason Code}. If the {Reason Code} parameter is provided the reason code is applied automatically to the item or transaction. The {Percentage Discount} and {Reason Code} must be separated by a pipe (|). **Example:** Apply a 10% discount to the current price for all items currently in the transaction: `DiscountAllItems_SetPer-`

Command	Description

	`centFromCurrentPriceCommand "10"`
	
	Apply the RC01 reason code:
	
	`DiscountAllItems_SetPer-centFromCurrentPriceCommand "10|RC01"`

DiscountAllItems_SetSub-totalAmountCommand	Sets the transaction subtotal amount by proportionally discounting the transaction items. The command takes an optional parameter {Target Subtotal Amount}. If a parameter is not provided, the command invokes the **Discount** dialog and prompts for the dollar amount. Starting with release 3.11.12, the command also takes an optional parameter {Reason Code}. If the {Reason Code} parameter is provided the reason code is applied automatically to the item or transaction. The {Target Subtotal Amount} and {Reason Code} must be separated by a pipe (|).

Command	Description

	Example:
	Set the subtotal amount to $20 by discounting all items proportionally:
	`DiscountAllItems_SetSubtotalAmountCommand "20"`
	Apply the RC01 reason code:
	`DiscountAllItems_SetSubtotalAmountCommand "20|RC01"`

DiscountAllItems_ SetPriceLevelACommand	Applies Price Level A to all items currently in the transaction. No parameters.
DiscountAllItems_ SetPriceLevelBCommand	Applies Price Level B to all items currently in the transaction. No parameters.
DiscountAllItems_ SetPriceLevelCCommand	Applies Price Level C to all items currently in the transaction. No parameters.
DiscountAllItems_SetPriceLevelDefaultCommand	Removes the price level from all items currently in the transaction. No parameters.
The following commands apply a discount to the **currently selected item**.	
DiscountCurrentItem_SetAmountFromCurrentPriceCommand	Applies a dollar amount discount to the current price for the currently selected

Command	Description

	item.
	
	The command takes an optional parameter {Discount Amount}. If a parameter is not provided, the command invokes the **Discount** dialog and prompts for the dollar amount.
	
	Starting with release 3.11.12, the command also takes an optional parameter {Reason Code}. If the {Reason Code} parameter is provided the reason code is applied automatically to the item or transaction. The {Discount Amount} and {Reason Code} must be separated by a pipe (|).
	
	Example:
	
	Apply a discount of $10 dollars to the current price for the currently selected item:
	
	`DiscountCurrentItem_SetAmountFromCurrentPriceCommand "10"`
	
	Apply the RC01 reason code:
	
	`DiscountCurrentItem_SetA-`

Command	Description
	`mountFromCurrentPriceCommand "10|RC01"`
DiscountCurrentItem_SetNoDiscountCommand	Removes any applied discount from the selected item. No parameters.
DiscountCurrentItem_SetPercentFromCurrentPriceCommand	Applies a percentage discount to the current price for the currently selected item. The command takes an optional parameter {Discount Percentage}. If a parameter is not provided, the command invokes the **Discount** dialog. Starting with release 3.11.12, the command also takes an optional parameter {Reason Code}. If the {Reason Code} parameter is provided the reason code is applied automatically to the item or transaction. The {Discount Percentage} and {Reason Code} must be separated by a pipe (|). **Example:** Apply a 10% discount to the current price for the currently selected item:

Command	Description

	`DiscountCurrentItem_SetPercentFromCurrentPriceCommand "10"`
	
	Apply the RC01 reason code:
	
	`DiscountCurrentItem_SetPercentFromCurrentPriceCommand "10|RC01"`

DiscountCurrentItem_SetPercentFromRetailPriceCommand	Applies a percentage discount to the retail price for currently selected item. The commend takes an optional parameter {Discount Percentage}. If a parameter is not provided, the command invokes the **Discount** dialog. Starting with release 3.11.12, the command also takes an optional parameter {Reason Code}. If the {Reason Code} parameter is provided the reason code is applied automatically to the item or transaction. The {Discount Percentage} and {Reason Code} must be separated by a pipe (|). **Example:**

Command	Description

	Apply a 10% discount to the retail price for the currently selected item:
	
	`DiscountCurrentItem_SetPercentFromRetailPriceCommand "10"`
	
	Apply the RC01 reason code:
	
	`DiscountCurrentItem_SetPercentFromRetailPriceCommand "10|RC01"`

DiscountCurrentItem_SetProfitMarginCommand	Sets the profit margin for the currently selected item. The command takes an optional parameter {Profit Margin Percentage}. If a parameter is not provided, the command invokes the **Discount** dialog. Starting with release 3.11.12, the command also takes an optional parameter {Reason Code}. If the {Reason Code} parameter is provided the reason code is applied automatically to the item or transaction. The {Profit Margin Percentage} and {Reason Code} must be separated by

Command	Description

	a pipe (|).
	
	Example:
	
	Sets a 10% profit margin for the currently selected item:
	
	`DiscountCurrentItem_ SetProfitMarginCommand "10"`
	
	Apply the RC01 reason code:
	
	`DiscountCurrentItem_ SetProfitMarginCommand "10|RC01"`

DiscountCurrentItem_ SetPriceLevelACommand	Applies Price Level A to the currently selected item. No parameters.
DiscountCurrentItem_ SetPriceLevelBCommand	Applies Price Level B to the currently selected item. No parameters.
DiscountCurrentItem_ SetPriceLevelCCommand	Applies Price Level C to the currently selected item. No parameters.
DiscountCurrentItem_ SetPriceLevelDefaultCommand	Removes any Price Level from the currently selected item. No parameters.
Use following commands to apply a discount to **all items that are currently in the**	

Command	Description
transaction or will be added later.	
DiscountTransaction_SetNoDiscountCommand	Removes the transaction discount. No parameters.
DiscountTransaction_SetFromMinimumPriceCommand	Applies a percentage discount to the minimum price for the transaction. The command takes an optional parameter {Discount Percentage}. If a parameter is not provided, the command invokes the Discount dialog. Starting with release 3.11.12, the command also takes an optional parameter {Reason Code}. If the {Reason Code} parameter is provided the reason code is applied automatically to the item or transaction. The {Discount Percentage} and {Reason Code} must be separated by a pipe (|). **Example:** Apply a 10% discount to the minimum price for the transaction: `DiscountTransaction_SetFromMin-`

Command	Description
	imumPriceCommand "10" Apply the RC01 reason code: `DiscountTransaction_SetFromMin-imumPriceCommand "10|RC01"`
DiscountTransaction_SetFromRe-tailPriceCommand	Applies a percentage discount to the retail price for the transaction. The command takes an optional para-meter {Discount Percentage}. If a para-meter is not provided, the command invokes the Discount dialog. Starting with release 3.11.12, the com-mand also takes an optional parameter {Reason Code}. If the {Reason Code} parameter is provided the reason code is applied automatically to the item or trans-action. The {Discount Percentage} and {Reason Code} must be separated by a pipe (|). **Example:** Apply a 10% discount to the retail price for the transaction:

Command	Description

	`DiscountTransaction_SetFromRetailPriceCommand "10"`
	
	Apply the RC01 reason code:
	
	`DiscountTransaction_SetFromRetailPriceCommand "10|RC01"`

DiscountTransaction_SetMarkupFromCostCommand	Sets the transaction markup from cost. The command takes an optional parameter{Markup Percentage}. If a parameter is not provided, the command invokes the Discount dialog. Starting with release 3.11.12, the command also takes an optional parameter {Reason Code}. If the {Reason Code} parameter is provided the reason code is applied automatically to the item or transaction. The {Markup Percentage} and {Reason Code} must be separated by a pipe (|). **Example:** `DiscountTransaction_SetMarkupFromCostCommand "10"`

Command	Description
	Apply the RC01 reason code: `DiscountTransaction_ SetMarkupFromCostCommand "10|RC01"`
DiscountTransaction_SetProfitMarginCommand	Sets the transaction profit margin. The command takes an optional parameter {Profit Margin Percentage}. If a parameter is not provided, the command invokes the Discount dialog. Starting with release 3.11.12, the command also takes an optional parameter {Reason Code}. If the {Reason Code} parameter is provided the reason code is applied automatically to the item or transaction. The {Profit Margin Percentage} and {Reason Code} must be separated by a pipe (|). **Example:** `DiscountTransaction_ SetProfitMarginCommand "10"` Apply the RC01 reason code:

Command	Description
	`DiscountTransaction_ SetProfitMarginCommand "10|RC01"`
DiscountTransaction_ SetPriceLevelACommand	Sets the transaction price level to Price Level A. No parameters.
DiscountTransaction_ SetPriceLevelBCommand	Sets the transaction price level to Price Level B. No parameters.
DiscountTransaction_ SetPriceLevelCCommand	Sets the transaction price level to Price Level C. No parameters.
DiscountTransaction_ SetPriceLevelDefaultCommand	Removes the transaction price level. No parameters.

Cash Drawer Commands

Use the cash drawer commands to perform cash drops and pay outs from the cash drawer.

Command	Description
Drawer_CashDropCommand	Initiates a cash drop and invokes the **Drop** dialog. No parameters.
Drawer_CashPayOutCommand	Performs a pay out and invokes the Pay Out dialog. No parameters.

Item Commands

Use item commands to perform various item functions, such as adding an item to a transaction, deleting an item from a transaction, and so on.

Item_AddCommand	Adds an item to a transaction. The command takes a parameter {Item Lookup Code}. **Example:** Adds an item with the item lookup code 12345678 to the transaction: `Item_AddCommand "12345678"`
Item_AddCommentCommand	Adds a comment to the currently selected item. The command takes an optional parameter {Comment Text}. If a parameter is not provided, the command invokes the **Item Comment** dialog. Example: `Item_AddCommentCommand "My comment on this item"`

Item_ClearAllCommand	Clears all items in the transaction. No parameters.

Item_DeleteCommand	Deletes an item from the transaction.
	
	The command takes a parameter {Item Lookup Code}.
	
	If a parameter is not provided, the command deletes the selected item(s).
	
	Example:
	
	Deletes item 12345678 from the transaction, if found:
	
	`Item_DeleteCommand "12345678"`
	
	Deletes the currently selected item(s) from the transaction:
	
	`Item_DeleteCommand`

Item_DuplicateCommand	Duplicates an item in the transaction. The command takes a parameter {Item Lookup Code}. If a parameter is not provided, the commnd duplicates the selected item.

	Example:
	
	Duplicates item 12345678 in the transaction, if found:
	
	`Item_DuplicateCommand "12345678"`
	
	Duplicates the currently selected item in the transaction:
	
	`Item_DuplicateCommand`

Item_InvokeItemActionsDialogCommand	Invokes the **Item Action** dialog for the selected item. No parameters.
Item_InvokeItemPriceCheckerDialogCommand	Invokes the **Item Price Checker** dialog in POS. **Note:** The Item Price Checker dialog can only be used to check prices for standard items. It cannot be used to check prices for matrix, lot matrix, or assembly items. The command takes an optional parameter {ON}. If the parameter is provided, the Item

	Price Checker dialog will display on net display if net display is enabled for the register. If the parameter is not provided, the dialog will not display on net display. **Example:** Displays the dialog on net display if net display is enabled for the register: `Item_InvokeItemPriceCheckerDialogCommand ON`
Item_LookupCommand	Invokes the **Item Lookup** dialog. The command takes an optional parameter{Search Criteria}, which may be a combination of item lookup code, description etc. If a parameter is not provided, the command invokes the **Item Lookup** dialog without any search criteria. **Example:** Invokes the Item Lookup dialog with search criteria "123 My":

	`Item_LookupCommand "123 My"`

Item_LookupDepCatCommand	Initiates item department or category lookup.
	
	The command takes an optional parameter {Search Criteria} which may be a department or category name, or a combination of both.
	
	If both a department and category name are in search criteria, separate them with a forward slash (/).
	
	Example:
	
	Initiates item search for department or category "Camping":
	
	`Item_LookupDepCatCommand "Camping"`
	
	Initiates item search by department and category "Clothing/Boys":
	
	`Item_LookupDepCatCommand "Clothing/Boys"`

Item Tax Commands

Use item tax commands to change item taxes.

Command	Description
ItemTax_SetDestinationTaxCommand	Applies the destination tax based on the shipping address. No parameters.
ItemTax_SetNoItemTaxForTransactionCommand	Makes the transaction tax free. No parameters.
ItemTax_SetForCurrentItemCommand	Invokes the **Select Tax** dialog for the currently selected item. No parameters.
ItemTax_SetForTransactionCommand	Invokes the **Select Tax** for the transaction. No parameters.
ItemTax_ToggleForItemCommand	Toggles item tax on/off for the selected item(s). No parameters.
ItemTax_ToggleForTransactionCommand	Toggles the transaction item tax on/off. No parameters.

Security Commands

Use the security command to invoke perform a cashier override.

Command	Description
Security_ChangeUserCommand	Logs out the current user and Invokes the Login dialog. Takes no parameter.

Order Commands

Use the order commands for functionality related to work orders, back orders, lay-aways, and quotes.

Command	Description
Order_AddCommentCommand	Adds a comment to an order. The command takes an optional parameter {Comment Text}. If a parameter is not provided, the commend invokes the **Order Comment** dialog. **Example:** `Order_AddCommentCommand "Order comment"`
Order_DepositCommand	Invokes the **Enter Deposit** dialog. No parameters.
Order_OverrideDepositPercentageCommand	Overrides the order deposit with a percentage of the order total. The command takes a parameter {Deposit Percentage}. **Usage:**

Command	Description
	Override the order deposit with 10% of order total: `Order_Over-rideDepositPercentageCommand "10"`
Order_Over-rideDepositAmounCommand	Overrides the order deposit with an amount. The command takes a parameter {Deposit Amount}. **Example:** Override the order deposit with an amount of $100: `Order_Over-rideDepositAmountCommand "100"`
Order_ChangDueDateCommand	Invokes the **Order Due Date** dialog. No parameters.
WorkOrder_RecallCommand	Invokes the **Recall Work Order** dialog where you can select a work order. No parameters.
Quote_RecallCommand	Invokes the **Recall Quote** dialog where

Command	Description
	you can select a quote. No parameters.
BackOrder_RecallCommand	Invokes the **Recall Back Order** dialog where you can select a back order. No parameters.
Layaway_RecallCommand	Invokes the **Recall Layaway** dialog where you can select a layaway. No parameters.
Layaway_PaymentCommand	Initiates the payment on layaway process. No parameters.

Reason Code Commands

Use the reason code commands to apply reason codes to items and transactions.

Command	Description
ReasonCode_SetReasonCodeForCurrentItemCommand	Applies a reason code to the currently selected item. The command takes a parameter {Reason Code}. **Example:** Apply the RMI01 reason code to the selected item:

Command	Description
	`ReasonCode_SetReasonCodeForCur-rentItemCommand "RMI01"`
ReasonCode_ SetReasonCodeForItemCommand	Applies a reason code to an item, using the transaction item key and the reason code. **Example:** Apply the RC01 reason code to an item with the item key "2": `ReasonCode_ SetReasonCodeForItemCommand "2|RC01"`
ReasonCode_ SetReasonCodeForTrans-actionCommand	Applies a reason code to the transaction. The command takes a parameter {Reason Code}. **Example:** Apply the RMI01 reason code to the trans-action: `ReasonCode_ SetReasonCodeForTrans-actionCommand "RMI01"`

Command	Description
ReasonCode_ SetReasonCodeForAllItem-sCommand	Applies a reason code to all items in the transaction. The command takes a parameter {Reason Code}. **Example:** Apply the RMI01 reason code to all items in the transaction: `ReasonCode_ SetReasonCodeForAllItem-sCommand "RMI01"`

Receipt Printing Commands

Use these commands for receipt printing.

Command	Description
Receipt_PrintXReportCommand	Prints the X report. No parameters.
Receipt_PrintZReportCommand	Prints the Z report. No parameters.
Receipt_PrintZZReportCommand	Prints the ZZ report. No parameters.
Receipt_ReprintCommand	Reprints the last receipt. No parameters.

Command	Description
Receipt_ReprintGiftCommand	Reprints the last receipt as a gift receipt. The receipt template must be configured to contain a gift receipt section. No parameters.
Receipt_ReprintWithTemplateCommand	Initiates the process of reprinting the last receipt using a different template. No parameters.
Receipt_PreviewCommand	Previews the receipt. The command takes a parameter {"Printer1"} or {"Printer2"} to select which printer to preview. The specified printer to be configured to use a receipt template. **Example:** Preview the receipt for Printer1: `Receipt_PreviewCommand "Printer1"`

Receipt Message Commands

Use receipt message commands to set or clear custom session variables used in the receipt template to print custom messages. Requires a customized receipt template which takes advantage of these functions.

Command	Description
ReceiptMessage_RemoveCustomMessageCommand	Clears custom message from a receipt session variable. The command takes a parameter {Session Variable Number.} **Example:** Clears session variable1: `ReceiptMessage_RemoveCustomMessageCommand "1"`
ReceiptMessage_SetCustomMessageCommand	Sets a custom message to a session variable for printing on the receipt. The command takes the parameters {Session Variable Number} and a {Value} separated by a pipe (|). **Example:** Sets session variable 1 to "My Message": `ReceiptMessage_SetCustomMessageCommand "1|My message"`

Sales Representative Commands

Use sales representative commands to set (or clear) sales representatives for items or transactions.

Command	Description
SalesRep_SetForCurrentItemCommand	Applies a sales representative to the currently selected item. The command takes an optional parameter {Sales Representative Number}. If a parameter is not provided, or the number is not found, the command Invokes the **Sales Rep Lookup** dialog where you can select a sales representative. **Example:** Apply the sales representative “001” to the currently selected item: `SalesRep_SetForCurrentItemCommand "001"`
SalesRep_SetForTransactionCommand	Applies a sales representative to the transaction. The command takes an optional parameter {Sales Representative Number}.

Command	Description
	If a parameter is not provided, or the number is not found, the command Invokes the **Sales Rep Lookup** dialog where you can select a sales rep-resentative. **Example:** Apply the sales representative "002" to the transaction: `SalesRep_SetForTrans-actionCommand "002"`
SalesRep_ClearFromCur-rentItemCommand	Removes the assigned sales rep-resentative from the currently selected item. No parameters.
SalesRep_ClearFromTrans-actionCommand	Removes the assigned sales rep-resentative from the transaction. No parameters.

Tendering Commands

Use the tendering commands to initiate functions related to transaction tendering. Is used in the same way as Transaction_InvokeTenderDialogCommand.

Command	Description
Tender_BeginCommand	Initiates the tendering process.
Tender_FixedAmountCommand	Tenders a specific tender type (by tender code) with a specified amount. The command takes two parameters {Tender Code} and {Decimal Amount} separated by a pipe (|). **Example:** Tender a transaction using tender type CSH with an amount $10.25; `Tender_FixedAmountCommand "CSH|10.25"` Starting with release 3.11.20, this command executes the Loyalty program, if applicable, so customers can earn or redeem points on the transaction. The command also opens the Tender Dialog because, at the time the command is executed, the amount of the Loyalty discount is not known.
Transaction_ExactTender-AmountCommand	Tenders a specific tender type (by tender code) with the exact total

Command	Description
	amount. The command takes a parameter {TenderCode}. **Example:** Tenders a transaction for the exact total amount using tender type CSH: `Transaction_ExactTender-AmountCommand "CSH"` Starting with release 3.11.20, this command executes the Loyalty program, if applicable, so customers can earn or redeem points on the transaction.

Time Clock Command

Use this command to display the Time Clock screen.

Command	Description
TimeClock_InvokeDialogCommand	Displays the Time Clock screen. No parameters.

Transaction Commands

Use these commands to manage the transaction flow.

Command	Description

Transaction_CancelTrans-actionCommand	Cancels the transaction and controls whether the application is closed or not.
	
	The command takes the optional parameters {True} or {False} or blank.
	
	Example:
	
	Cancel the transaction and close the application:
	
	`Transaction_CancelTrans-actionCommand "True"`
	
	Or:
	
	`Transaction_CancelTrans-actionCommand`
	
	Cancel the transaction and do not close the application:
	
	`Transaction_CancelTrans-actionCommand "False"`

Transaction_ChangeToLay-awayCommand	Changes the transaction to a layaway. No parameters.
Transaction_ChangeToQuoteCom-	Changes the transaction to quote. No

Command	Description
mand	parameters.
Transaction_ChangeToWorkOrder-Command	Changes the transaction to work order. No parameters.
Transaction_AddCommentCommand	Adds a comment to the transaction . The command takes an optional parameter {Comment Text}. If a parameter is not provided, the command invokes the **Transaction Comment** dialog. **Example:** `Transaction_AddCommentCommand "Comment text"`
Transaction_SetReturnModeCommand	Changes the transaction to return transaction. No parameters.
Transaction_SetSalesModeCommand	Changes the transaction from return to sale. No parameters.
Transaction_SetOnHoldCommand	Puts the current transaction on hold. No parameters.
Transaction_InvokeTender-	Invokes the **Tender** dialog and initiates

Command	Description
DialogCommand	the tendering process. No parameters. Similar to Tender_BeginCommand.

Transaction_NetDisplayCommand	Toggles net display on/off. Net display must be enabled in Store Manager.
	
	The command takes the parameters {ON} or {OFF}.
	
	If a parameter is not provided, the command toggles the net display on/off.
	
	Example:
	
	Turn on net display:
	
	`Transaction_NetDisplayCommand "ON"`
	
	Turn off net display:
	
	`Transaction_NetDisplayCommand "OFF"`
	
	Toggle net display on/off:
	
	`Transaction_NetDisplayCommand`

Transaction_NoSaleCommand	Performs a no sale transaction. No parameters.

Command	Description
Transaction_RecallForReturnCommand	Initiates the recall for return process. No parameters.
Transaction_RecallForVoidCommand	Initiates the recall for void process. No parameters.
Transaction_RecallFromHoldCommand	Recalls a transaction from hold. No parameters.
Transaction_ToggleReturnModeCommand	Toggles the transaction return mode on/ff. No parameters.
Transaction_ViewJournalCommand	Displays the journal. No parameters.

Web Browser Command

Use this command to display a URL in the built-in web browser.

Command	Description
WebBrowser_NavigateCommand	Displays a URL (web page) in the built-in browser. The command takes a parameter {URL}. **Example:** `WebBrowser_NavigateCommand`

Command	Description
	`"http://www.retailhero.com"`

Custom Action Command

Use this command to enable custom functionality in a POS Extension using a custom button (or a task pad button).

Command	Description
CustomActionCommand	**Example:** `CustomActionCommand "param1|param2|param3"` Essentially, this command fires up an event in the POS, and passes a parameter to it. Your extension will listen to that event, and when it is fired, check the parameter to see if it is the "own" parameter (which will be processed) or a "foreign" one (which will be ignored). The command/event is available equally to all extensions, so it is important for the extension to distinguish by looking at the parameter. Please review the demo project in the SDK:

Command	Description

	C:\Program Files (x86)\Retail Hero\RMH POS\RMH POS SDK\RMHDe-moExtension-Nat-ive\RMHDemoExtension
	
	(or the Telerik version of the same).
	
	Check the area "Custom Button Hand-ling". The comment in the project reads:
	
	// The custom buttons could use any string parameter (but only one per com-mand - XAML allows only one command parameter)
	
	// Multiple parameters could be passed as a single string with separators, such as: "para-meter1|parameter2|parameter3"
	
	// It is recommended to use GUIDs as parameter. That will make sure that dif-ferent extensions don't mix-up handling
	
	// the same custom action event.
	
	// In the CustomPanel xaml, the Custom Action 1 and 2 buttons use guids as para-meters

Command	Description

	// Each custom button raises the same even, but passes a different parameter
	
	// That's how multiple extensions know which event is "their" and ignore all others.
	
	//Guid for Custom Action 1 button: DEDE0403-5C7A-4A84-BB75-F1DD0D914F4D
	
	//Guid for Custom Action 2 button: 71D09398-1A5C-4CB4-9738-1584B61483F1
	
	Although this explanation is a bit outdated (it talks about CustomPanel.xaml while since RMH version 3.2 we handle the custom buttons by creating them in Store Manager, not via the XAML modification), it still applies in principle no matter how the button is created.
	
	In fact, in your custom button you can use any "string" parameter with your command, but we recommend using generated GUIDs as that would prevent the possible extension "clash" if two or more

Command	Description
	extensions happen to use the same string parameter. See also p.19 in RMH_SDKProjects_v1_CL.pdf (in the POS SDK folder).

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.