

## An Introduction to POS Touch

“Welcome to Point of Sale Touch! Point of Sale is more commonly known as “The checkout counter”.

It is where our customers pay for the goods and services that they are buying.

In this video you will learn the basic elements of Point of Sale: You’ll start by learning how to launch the application, sign-in, and exit.

You will get a basic overview of the keywords and terminology that you need to know when using Point of Sale.

And finally, you’ll become familiar with common Point of Sale transactions.

Let’s start with the very first step: Launching POS Touch.

### Topics

- Launch/Exit POS
- POS Screens & Terminology
- Basic Transaction Types

### Launch/Exit POS

Point of Sale Touch can be launched from the Eagle Browser or your desktop.

Since your system is set up for Point of Sale Touch, it automatically opens in the Touch format.

Depending on how your store is set up, you may be required to enter a User ID and password to use POS.

“Upon entering POS if you’re asked to sign-in using your Clerk name and Password, use the onscreen keyboard to type your Clerk name, and then tap on the password field.

Type in your password and press or tap <ENTER>.

If you are using the biometric reader simply place your finger on the device and you will automatically be logged in to Point of Sale.

If your store participates in a loyalty program, you may be prompted for a loyalty ID number.

This is where you would scan in the customer’s loyalty card.

If they don’t have one, you can hit Escape or Cancel to continue with the transaction.

You may be required to sign in before each transaction, or POS may save your information the first time you enter it.

It all depends on how your store was set up.

This sign-on stuff is important, because each transaction is tied to the signed on user... you.

You’re responsible for any transactions that take place when you’re signed in as the clerk.

What happens if you’re signed in and need to leave your station?

Easy. Just make sure your cursor is in the Item or SKU field and press <CLEAR> or tap the padlock icon to return to the sign-in screen.

## POS Screens & Terminology

Eagle Point of Sale has two main screens, the posting screen and the header Screen.

A third screen, the totals screen, appears at the end of the transaction.

Let's take a look at each type of screen.

The posting screen is where you will spend the majority of your time while in POS.

It is here that you will "post" items on the screen to be sold.

This can be accomplished by scanning the UPC code on the product, typing the SKU number in directly with the onscreen keyboard or using one of the many product lookup features available on the Eagle system.

The posting screen has two main areas.

The first is the Customer Area, which consists of the Customer and P.O. # boxes (and the Job # and Reference boxes, if displayed).

If your cursor is flashing in the Item SKU field you can press the Customer icon or touch the Customer field to access the customer-related options.

The Second area is referred to as the Item Posting Area, which includes the Item (SKU), Quantity, Price, Desc, and Cost boxes.

Touch the Post button or the Item (SKU) field to activate this part of the posting screen

This area is where you post the items and quantities the customer is buying.

You can post up to 996 line items on the Posting Screen.

The other main screen in POS is the Header screen.

To access the header touch the customer icon.

This is where information about the transaction can be entered.

This information can include: Customer information; Shipping information; Pricing information; Tax information; Terms information, and more.

The Header is typically used on Estimates, Orders, and Special Orders. It is not used as much on Sale transactions.

After you've posted the items to the transaction, you'll press Tender. This will bring you to the totals screen.

The totals screen displays the total amount due and prompts you to enter the amount tendered.

Each POS screen has three key areas that you will need to refer to from time to time:

The Title Bar, the Menu Bar, and Toolbar. Let's start at the top and work our way down.

The Title bar displays key information about your POS session.

This includes:

The Name of the Application,

Type of Transaction, whether it's a sale, order, an estimate... Name & Number of the Store you are locked in to The Terminal #, and the signed on User, which of course, should be you!

The next area is called the Menu Bar. Selecting a label opens a menu of related commands, allowing you to choose from a variety of functions.

To the right of the screen is the TOOLBAR.


The Toolbar provides Shortcuts to some of the most commonly used POS activities.

Pressing the toolbar buttons gives you quick access to important functions that are related to your current activity.

When you are in Posting mode, as we are right now, the toolbar offers access to Posting actions such as Displaying information about a particular SKU, changing a line, or crediting a returned item to the current transaction.

Touching Menu opens the Posting Menu, while Lookup gives you options for looking up an item or an invoice.

Other Posting Actions are available when you touch the Right arrow.

Notice that, if you switch to the Customer Mode, or have your cursor in the customer  header, the toolbar displays buttons related to Customer Actions.

It's important to keep in mind that pressing Menu on the Customer Actions toolbar opens a different set of options than that of the Posting Menu.

Likewise, the Toolbar options change when you are on the Tender, or Total screen, giving you access to the Totals Menu as well as Alternate Tender options.

This is also where you can apply a discount and save, suspend, or void the transaction.

## Basic Transaction Types

As a cashier at POS, you will be responsible for completing many types of transactions.

The most common, of course, is a sale transaction: ringing up all items being sold and accepting payment from the Customer.

Let's learn more about sales transactions and other basic transaction types now.

Cash Transactions are any transactions that are paid by cash, check, bankcard (credit card)—the usual payments tendered by customers—or by Alternate tenders such as Gift Cards or store or manufacturer coupons.

A Charge Transaction on the other hand, is any transaction that is being charged to a house account to be paid later by a statement.

And finally, a Saved transaction is any transaction that is being saved for later invoice.

You'll learn the details about completing all these types of transactions in future lessons.

OK! You've seen an overview of Point of Sale, and learned some of the terminology that you'll need to know.

As we wrap up this module, let's put it all together and run through a basic sale transaction – which is what you'll be doing when you start using Point of Sale.

A sale is the basic retail transaction.

As a Point of Sale clerk, you are responsible for identifying who the customer is and what they are buying.

At the end of the sale, you total the transaction and tender the payment.

If you wish to close Point of sale, the preferred method is to tap the X in the upper right corner of the screen while you are still logged in.

If the sign-on window is displayed, just tap Cancel or Escape to exit Point of Sale.

Now that you've finished this video, I'd encourage you to spend some time signing into Point of Sale and exploring the screens and topics that we've discussed today.

As you might guess, the more familiar you are with the Point of Sale screens and terms, the easier it will be to learn the detailed information in later sessions!

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