

An Introduction to Point of Sale (POS)

Point of Sale is where your customer meets your business, whether it's in-person or online. It's important to make a good impression to keep the customer returning. Therefore, it's just as important that you're confident with handling POS transactions.

In this introduction course, we'll show how to launch point of sale, enter the beginning cash balance, and view POS related information.

We'll also show the basics on the Posting, Header, and Totals screens.

We recommend you view this course in the sequence we present it here. We'll also ask a few questions along the way to help you retain what you learn.

Topics

- Launch POS
- Sign-on and Navigation
- Header, Posting, and Totals

Launch POS

There are three methods to launch POS.

You can select the Point of Sale shortcut icon if you have it on your screen.

From the Eagle browser, you can enter POS in the Launch Bar and press Enter, or you can select Point of Sale from the menu.

Another method is to select the keys Ctrl + Alt + P on your keyboard.

Sign-on and Navigation

When Point of Sale launches, you will be prompted to enter a clerk name and Password.

A best practice is to create a username and password for each clerk.

If you are signing in for the first time, you may be prompted to enter a Beginning Cash Drawer Balance.

Enter the correct amount and press OK.

If you've entered the wrong amount, you can correct it by selecting Menu and choosing the Print Totals and Close Cash Drawer option under Activity.

Select Change Beginning Cash to update your amount.

If your store participates in a loyalty program, the system may prompt you for a Loyalty ID before starting the transaction.

Scan in the customer's loyalty card or enter the number manually and choose OK.

The Title bar displays relevant information about your Point of Sale session.

This includes the Name of the Application, the Type of Transaction you are processing, the Store Number you are locked in to, the Terminal number, and the Signed On User.

If you need to leave your station, press Esc on the keyboard or select the Clerk icon from the ribbon menu to sign out.

To close Point of sale, click the X button in the upper right corner of the screen.

If you are logged out, select cancel.

When asked if you wish to exit Point of Sale, choose Yes.

Header, Posting, and Totals

This is the Point of Sale Posting screen.

Select the highlighted fields to learn more about these common features.

When you're finished, choose Continue to proceed to the Total screen.

Once you have entered all the items for a transaction, select Total.

You can also press the plus key on the keypad. The Point-of-Sale Total screen displays.

Here you can enter the amount tendered.

Sales can be paid with Cash, Check, or a Bankcard. Stores with Accounts Receivable may also allow customers to charge the transaction to their account.

If you need to add items to the sale, select Post on the ribbon to return to the Posting screen and complete the entries as before.

When you finish entering the tender amount(s), select Total on the ribbon to complete the transaction. The system prints a receipt for the customer and returns you to the Point-of-Sale Sale screen.

Select the highlighted fields on the Total screen to learn more about these common features.

When you're finished, choose Continue to proceed to the next section.

The Header screen lets you view additional information about the transaction and the customer. Typically, the header is used for Estimates, Orders, Special Orders, and Layaways.

To open the Header screen, select the Customer icon in the ribbon.

Then select the Header link.

Here you can enter relevant customer information such as a phone number, address, or special instructions about the purchase.

With the correct security bits, you can also change Term Codes, Tax Codes, and the related Salesperson.

When all of the information is updated, select Post or F11 to return to the posting screen.

This completes the Header, Posting, and Totals section. You can use the back arrows or select the Home button to review previous topics.

You should now know enough to start working with Point of Sale.

In this course, we showed you how to launch, sign-on, and navigate in Point of Sale.

We also described the most common features you'll encounter on the Header, Posting, and Totals screen.

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Corporate Office

804 Las Cimas Parkway
Austin, TX 78746
USA

Toll Free: +1.888.448.2636
Direct: +1.512.328.2300
Fax: +1.512.278.5590

Latin America and Caribbean

Blvd. Antonio L. Rodriguez #1882 Int. 104
Plaza Central, Col. Santa Maria
Monterrey, Nuevo Leon, CP 64650
Mexico

Phone: +52.81.1551.7100
Fax: +52.81.1551.7117

Europe, Middle East and Africa

No. 1 The Arena
Downshire Way
Bracknell, Berkshire RG12 1PU
United Kingdom

Phone: +44.1344.468468
Fax: +44.1344.468010

Asia

238A Thomson Road #23-06
Novena Square Tower A
Singapore 307684

Singapore
Phone: +65.6333.8121
Fax: +65.6333.8131

Australia and New Zealand

Suite 2 Level 8,
100 Pacific Highway
North Sydney, NSW 2060
Australia

Phone: +61.2.9927.6200
Fax: +61.2.9927.6298