

## An Introduction to Point of Sale

Robert: We're really glad to have you on board, Kayla. Let's get you started with Point of Sale.

Kayla: That sounds great! Except, I've never run Point of Sale before and I don't really know what to do.

Robert: No worries. I'll walk you through the basics. Select any topic on the screen to begin.

### Topics:

- Launch and Navigate
- Header Screen
- Totals Screen

### Launch and Navigate

When Point of Sale launches, you will be prompted to enter a clerk name and Password. 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. You may also be prompted for a Loyalty ID number before you begin a transaction if your store participates in a loyalty program.

Scan in the customer's loyalty card or enter the number manually and press 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 your keyboard or select the User 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 Screen

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 access it, select customer and then press Header. You can also press F11 to toggle to the Header screen.

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.

## Totals Screen

When all the items in a transaction have been posted, select Totals. You can also press the plus key on the keypad. The total amount due will display. Here you can enter the amount tendered. Sales can be paid for with Cash, Check or a Bankcard. Stores with Accounts Receivable may also allow customers to charge the transaction to their account.

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