Charge Transactions

Customers with charge accounts make purchases and pay for them based on the credit terms you offer.

Having a charge account does not restrict these customers from paying for purchases with cash, check, or bankcard.

Instead, it allows them the ability to postpone payment until they receive a statement at the end of your store's billing cycle, typically the end of the month.

When you complete this course, you should be able to describe the process for POS (narrate as point-of-sale) transactions that require putting a charge on a customer's account.

Topics

- Post Screen
- Total Screen

Post Screen

Charge transactions have three basic steps:

Select the customer's account, confirm that the purchaser is authorized to charge on this account, and complete the charge transaction.

Let's see this in point of sale. Select a customer for the transaction. Then, confirm the purchaser's authorization to make a charge for their company.

With the Customer Field selected, choose Menu Kpad and select Enter Charge Authorization. Select the appropriate name from the list and choose OK.

You can add a temporary name to the list if needed, but make sure to call the customer to verify.

Otherwise, your Accounts Receivable clerk is typically the person who adds names to the Charge Authorization list.

When you finish adding items to the order, continue to the Totals Due screen as usual.

Total Screen

Ask the customer if they want to charge the entire amount or a part of it.

If they're charging the entire amount, just press the Enter key; otherwise, enter the correct amounts in the corresponding fields first.

Eagle prompts for a signature.

When the customer signs on the electronic signature pad, select OK to confirm.

If you do not have a signature pad or for some reason the customer cannot sign, choose Cancel and follow the prompt for a list of override options.

With the signature or override accepted, Eagle completes the In-House Charge transaction.

As you can see, Point of Sale makes it easy for you to quickly look up a customer's account and charge a transaction.

Your customers will be happy that charge transactions can be completed quickly, so they can get on with their day.

In this course, we showed you how to post and total charge transactions at point of sale.

About Epicor

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