An Overview of Offline Point of Sale

I'm sorry. The computers are down, and I can't check you out right now.

The thought of having to say those words to your customers should have you shuddering.

Luckily, the system provides Offline Point of Sale, a way to continue processing transactions even when a network connection to the server is not available.

When the system becomes available, you can upload sales transactions and process them for end of day balancing.

Offline Point of Sale offers many of the same features as Point of Sale including:

Invoicing, customer pricing, and inventory pricing such as matrix pricing and multiple selling units.

Network printing is available if the network is functioning.

The system also supports Document Imaging and Signature capture for uploading.

When POS is offline, there are some things that you cannot do such as process credit cards, review saved documents, or reprint invoices.

The benefits of having Offline POS set up and ready for when you need it far outweigh its limitations.

When you complete this course, you should be able to describe how to set up Offline POS, how to use it to run transactions when your system is unavailable, and how to upload transactions when your system is back online.

Topics

- How to Setup Offline POS
- How to Use Offline POS
- How to Upload Transactions

How to Setup Offline POS

Setting up Offline POS includes several tasks:

Configuring Options,

Creating Offline Files including the Create Offline Refresh Report (COR), and

Determine if you want to use a Scheduler or Master/Client network to refresh offline transactions,

You can find detailed instructions for configuring options such as when you want the system to warn that the offline data requires refresh in online Help.

Be sure to read the descriptions carefully to make sure that the default selection is the best choice for your business.

Next, create the offline files required if you ever must run Offline Point of Sale.

These files contain the item, customer, and pricing information needed to complete the transactions.

The Create Offline Refresh report, or COR, is the key to this step.

Because COR must be run daily to ensure data is current, it is usually included in a queue that runs the report automatically.

To set up this report, open Create Offline Refresh from the Point of Sale Reports menu, or type COR (Narrate each letter) in the launch bar.

Enter the number of the store whose offline files you're creating.

If you have a multi-store system, type an asterisk in the field to indicate all stores.

Select Option D to tell the system to include the description index so your clerks can look up items by description when in offline POS.

Since descriptions don't often change, the COR with Option D is usually scheduled to run just once a week, so you'll add this report to two queues.

The weekly queue includes COR with Option D selected.

The daily queue includes the COR report without option D every day except for the day the weekly queue runs.

When deciding what time to schedule the COR, try to run it when there is no chance that anyone will be using the Point-of-Sale Training Mode which can result in errors.

With the offline files created, the system downloads the data to each terminal by the scheduler which you can run on each POS terminal or you can set up a master/client network for offline POS.

With the master/client setup, the system runs the scheduler on the master terminal, then refreshes the data on the client terminals.

The master/client setup is faster and more reliable than running the Scheduler on each terminal.

It also reduces scheduling bottlenecks since only the master terminal requires refresh before the store opens.

For more information on setting up your POS terminals in a master/client configuration, refer to online help.

To set up the scheduler, open it by clicking the icon on the taskbar.

If the icon is missing, you can find Scheduler in the Utilities menu of the browser.

Note, you should run Scheduler whenever your PC is up.

Also set Option 69 to YES to require a password to stop the Scheduler or Listener on the system.

The first time you run Scheduler, choose Full Update-Offline Point of Sale data in the Task Description box.

You must do this on each Point of Sale terminal, or you will not have any current item, customer, and pricing data when in offline POS.

Let the update run; it could take a while since it is downloading all the files.

When the download is finished, you're ready to schedule daily and monthly updates.

Open the Scheduler and check the entries for Daily Refresh Offline POS Data and Full Update-Offline POS Data.

If either one indicates Disabled, highlight it and remove the checkmark.

Now set the time for each download, using the Days to Run and Time selections.

If the tasks were not disabled, you may only have to review the default times and make sure they work for your store's schedule.

You should schedule the Full Update for once a month and run the Daily Refresh on a daily basis.

Select a time after server maintenance finishes, but at least 15 minutes before your store opens.

If downloading files to each terminal, stagger the times to minimize bandwidth issues on the network when updating.

Select Change Task to save the changes.

With both tasks scheduled, close the window and repeat the process on each terminal.

When both tasks are scheduled, close the window. Remember to repeat this process on each terminal.

With the downloads scheduled, you're set.

They will run automatically from this point on as long as the scheduler is running on the terminal.

How to Use Offline POS

You can start Offline POS by using the Eagle Browser Menu, but if a network connection is not available, you will be prompted to enter Offline POS when attempting to enter normal Point of Sale.

The OFFLINE imprint in the background of the offline POS screen makes it obvious that you are running in offline mode.

Make sure you do not use this mode when you can connect live to your server and run live transactions.

Most steps in a transaction work the same as in regular Point of Sale.

Customer lookup is the same, allowing you to look up by number, name, phone, etc.

Inventory lookup is also the same, with the same lookups and details.

There are a few things you can't do, like use Quick Recall, open saved transactions, or tender Gift Cards.

Some things are handled differently, such as credit card processing.

Depending on your options configuration, one of two things will happen.

You can process credit cards on a separate, stand-alone device with information entered on the system totals screen for informational purposes only.

Alternately, you'll obtain an approval code from the processor and enter it on the credit authorization screen.

Depending on your setup, your system may also require information in other fields.

The credit card information is then submitted when the transaction is uploaded to the system.

Processing normally occurs at night.

How to Upload Transactions

When the terminal can connect to the server, it is time to upload the transactions for processing.

While you can upload offline transactions as soon as the server is available, you should make sure your connection is stable before beginning the upload.

An interrupted upload can cause data corruption.

You have two options for uploading transactions: manual uploads or automatic uploads.

Whichever method you choose, the transactions must be uploaded from each terminal that was used for offline POS.

To manually upload transactions, select the Offline POS menu link.

Then select Upload Offline Transactions.

A system dialog appears.

Highlight the Current Transaction Set and notice the Transaction File Information below.

This tells you how many transactions will be uploaded.

When you are ready, press Begin Upload.

This starts the upload process.

Because multiple terminals can be processing transactions independently of each other while running Point of Sale offline, the system re-numbers offline transactions as part of the upload/merge process.

This eliminates the possibility of duplicate transaction numbers.

The system automatically adds the original offline document number to the reference field of the completed transaction.

When the upload process completes, you will see a message reminding you to review the results in the spooler by viewing the MRGOPOS (narrate by its letters: M R G O P O S) report.

Open this report through Network Access.

If you use ProtoBase, you should also review the MRGOPROT (narrate by its letters: M R G O P R O T) report to make sure all the offline credit card transactions uploaded properly.

If you get an error message, DO NOT UPLOAD AGAIN, call the Eagle Advice Line.

The advantage of a manual upload is that the sales information becomes immediately available in live POS.

Remember, you must upload transactions at each terminal that was used in Offline POS.

The second method is to configure the terminal for automatic upload.

Use this to make sure all terminals have been uploaded or to schedule all the terminals to upload at the end of the day.

With automatic uploads, data is not available until the uploads complete.

Even if planning to use the manual upload method, it’s recommended to setup an automatic upload also in case any terminals are missed.

In addition, it’s recommended that you set up the Eagle alerts feature to warn key personnel if offline transactions exist that have not been uploaded.

To setup the automatic upload, open the Scheduler in the taskbar at each terminal.

Select Upload Offline POS Transactions.

If it is disabled, uncheck the box labeled *Disabled?*.

Set it to run daily and set the time of day you want it to run.

Remember to stagger the times between terminals.

When finished making changes, select Change Task at the bottom of the window.

Once this is done, the terminal will check every day to see if there are Offline transactions to upload.

As you can see, the benefits of maintaining accurate customer information, inventory information, and uploading documents and signature images make Offline POS a necessity to complement live POS.

In this course, we described how to set up Offline POS, how to use it to run transactions when your system is unavailable, and how to upload transactions when your system is back online.

About Epicor

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