Setting Up Offline POS

You can continue processing sale transactions even when the internet is down. With some quick set up, you can be ready for certain interruptions in service.

Objectives

- Setting Up Offline POS
- Using Offline POS
- Viewing Your Transactions

Setting Up Offline POS

Your offline server will be configured for you.

Each server can support up to 8 POS stations.

You can easily verify that the server is? listed in your live tenant.

From the main menu, select Sales. Click Setup and then choose Offline Servers. All existing devices are listed along with their installation information.

Your offline URL will align with this format.

Bookmark the address or create a desktop shortcut for easy access.

When you open the link, you can login using your regular user credentials.

Offline Mode appears at the top indicating you are running offline POS.

From Sales choose *Setup* and then Payment Processing.

On the Gateway tab, you should see the Enable Offline Payment Card toggle set to *on* along with the minimum and maximum offline amounts identified.

This field Establishes a minimum amount at which the cashier is prompted for manager approval.

The customer's contact information should be taken down at the time of the sale in case their credit card is later declined.

Amounts over the minimum will require the manager to obtain and enter a bankcard authorization code at point of sale to proceed.

A Maximum Amount may be established above which a bankcard tender will not be accepted even with a manager approval.

In this example, credit card transactions over $350.00 and up to $3500.00 will require a manager's approval and an authorization code.

Using Offline POS

Offline POS is similar to the online version except for a few limitations.

In offline mode, you will only be able to access POS.

Select the register assigned to you from the drop-down menu.

Enter the opening balance.

Create a transaction for your default cash customer or select a customer's name if they have an account.

In the posting screen, search for and add items as you normally would.

Click Make Payment to proceed.

Cash is selected as the default.

Click Payment Card for credit card transactions.

The cashier may see a prompt for a manager approval and auth code based on the Offline Payment Card Rules settings.

Note that you can only insert or swipe the card during offline mode. You cannot manually enter the card details.

You can print the receipt but cannot email it since you are offline.

Additionally, if the credit card transaction is declined when uploaded and the cardholder cannot be contacted, you may incur a loss.

To balance the register, click the gear icon.

Select Register and then choose Offline Summary.

A pop-up appears displaying the transaction information. Click Close Register to close the register. Click Print Summary and balance the drawer using the results.

Viewing Your Transactions

When you're back online, transactions will automatically be uploaded to the live tenant.

However, offline *payment card* amounts will not be uploaded for processing until you physically run a payment card transaction on each PC that was offline.

To view offline transactions, select Sales and then Activity.

Choose Transactions to view the transaction history.

In the Transactions page, use the available drop-down menus to filter the transaction history.

Click More Filters. Click the Transactions Origin drop-down menu. Select Offline POS and then click Search.

In the table, offline transactions are identified by alphanumeric transaction numbers whereas *online* transactions contain *numeric* values.

Check the box or check *this* box to select all transactions.

The Export to Excel button exports the data and the Form button opens the transaction in full screen.

The Email and Print buttons let you email and print transactions respectively.

For more help, select the Help icon and type *Offline POS* in the search field.

There are several resources here to guide you.

Recap

With some initial setup you can continue getting your customer through the check out regardless of your internet status.

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