Using POS Functions

At Point of Sale, there are several features to keep the checkout moving, while maintaining security standards. These include performing a cash sweep, using a pay-in or pay-out, processing parked transactions, viewing customer and product data, applying a discount, and locking a register.

Objectives

- Using Gear Functions and Lock
- Processing Parked Transactions
- Viewing Product and Customer Information
- Adding a Discount

Using Gear Functions and Lock

From the Gear icon in point of sale you can use a coupon, activate the *Bag/Bucket Sale* feature, view saved or processed transactions, reprint the last receipt, and look up gift card details.

At the right bottom of the screen, click the *Register* button. Here you can close the register, perform a cash sweep, or process a pay-in or pay-out.

Cash sweep parameters are defined in the *Sales Setup Settings.* When the amount of cash in the register reaches the *Cash Sweep Threshold*, the clerk will be alerted. If their role permits, they can click *Continue* to enter more transactions. If the clerk does not have the '*Allow Override of Cash Sweep Limit'* permission, they will see the OVERRIDE REQUIRED pop-up, and a manager will need to act.

To perform a cash sweep, click the *Cash Sweep* button or use *Shift-F5* on your keyboard. In the pop-up, enter the amount you're withdrawing from the register and select *Draw*. Based on the users' permissions, a manager override may be required.

The *Pay-In* and *Pay-out* functions could be used to pay a local vendor from the cash drawer or to add in more cash when needed. To perform a pay-in, select the *Pay-In* button or use *Shift-F6* keys on your keyboard. Select the reason from the drop-down menu.

Note that you can *set up* the reasons for pay-in/pay-out, go to the *Sales Setup* page and click *Pay-In/Pay-Out.* The grid displays all the existing reasons. You can export, add, or edit the reasons here.

Enter the amount you wish to deposit to the register and then click *Deposit.*

To perform a pay-out, select the *Pay-Out* button or use *Shift-F7* on your keyboard. Just like the pay-in, select the reason from the drop-down menu. **Enter the amount being removed from the register and tap *Draw*.**

If you need to step aside from the register for a short period of time then, you can manually lock it by tapping here. You'll see the *POS Locked* pop-up.

The *Username* field defaults to the name of the last POS clerk. Enter your PIN or password and hit Enter on your keyboard. If you wish to exit the application, select *Logout.* To get back to the POS posting screen, select *Login.*

Processing Parked Transactions

A transaction can be suspended temporarily and then recalled when the customer is ready to complete it.

Tap the *Save* icon. The *Reference* window is displayed for cash customers. Enter any information you think will help you recall the person and the transaction. You must enter at least 5 characters then click *Save.*

If the transaction is for one of your customer accounts, then a confirmation popup is displayed asking you to confirm saving the sale. Select Yes to park the transaction.

To recall a transaction, select the *Receipt* icon. Here you can see a list of all currently *parked transactions.* Use the reference number or customer name to locate the transaction. Then click the S*hopping Cart* icon on the transaction you need to recall.

The transaction will appear, and you can continue to add or remove items. When everything is correct, select *Make Payment.*

Product and Customer Information

In the POS page, use the search bar to bring up a customer's account. Select the *Customer* icon.

In the *Profile* tab, you can view the *Date of Last Purchase* with the last invoices that occurred during earlier transactions. Scroll down to view the list of loyalty programs. *Already a Member* indicates that the customer is a member of the specific loyalty program. Tap *Become a Member* to enroll the customer in a new loyalty program.

Loyalty shows the details of the enrolled loyalty program along with the total number of points and rewards earned.

The *Customer Details* tab displays personal information. If you have permission, you can edit or update with this icon. The *Contacts* pop-up appears. Make the necessary changes and when you are done tap *Save.*

To view *product*-related information, click the *Product* icon. The *Branch* shows you the quantity on hand in other locations and the *Source* identifies the supplier.

Adding a Discount

With proper permissions, you can add discounts to products during a transaction. After adding items to the posting screen, if you want to apply a discount to an individual item, then click the *price* of the item.

The *Sales Price* pop-up appears. You can add a *percent or amount. Dollar Discount* allows specific dollar amount discounts. *Percent Discount* lets you offer a discount based on a percentage. For this example, let's select *Percent Discount.*

Enter the discount percentage in *this* field. Next, provide a reason for the price adjustment. The discounted price is displayed here. Tap *Update.*

The discount applied to the product is displayed below the item in the posting screen.

If you want to add a discount to the *total* amount, then select the *Discount* button at the left bottom of the screen.

The *Transaction Discount* pop-up appears. Select *Percent Discount.* Add the discount percentage by dragging the value on the *slider* or enter the value here. Select *Apply* to apply the discount.

The discount applied to the subtotal is displayed here.

When all discounts are applied, tap *Make Payment* to complete the sales transaction. The discount applied is also printed on the receipt.

Recap

Create business processes to utilize all the functionality available in point of sale.

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