Cashier's Guide

Microsoft Dynamics – Point of Sale

Part No.

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Contents

Introducing the *Cashier's Guide*

Things to know...

As a manager or supervisor, do I need to know the information in the *Cashier's Guide*?

Yes, the *Cashier's Guide* provides the information that you will need to use POS View. There is little duplication of information with the *Manager's Guide*.

This guide was designed primarily for cashiers to learn about using POS View of Microsoft Dynamics - Point of Sale. With the *Cashier's Guide* you can quickly learn to:

- Process a transaction using POS View
- Accept various methods of payment, including credit and debit cards
- Find items, transactions, and customers in the store database using basic and more advanced search tools
- Use various tools to speed up your work, such as the currency calculator.
- Process refunds and exchanges
- Issue gift cards
- Receive inventory at the register
- Customize the POS View screen for your register
- Check prices and inventory availability

Using the *Cashier's Guide*

Things to know...

Other than the *Cashier's Guide*, should I be familiar with any other information if I am a cashier.

While nearly everything that you need to know is most likely in the *Cashier's Guide*, several other resources may prove helpful:

- Quick Reference Card
- POS View Help (Press F1.)

Is there a way to practice without interfering with store operations?

Point of Sale offers a practice mode. It must first be set up in Manager View by someone with an Owner's role permissions.

Use the *Cashier's Guide* for information about all of the aspects of running your register and making sales transactions. Often there is more than one way to accomplish a task.

A number of cues throughout the book will help you easily find what you are looking for:

- Each chapter begins with its own table of contents of topics and subtopics.
- Page 2 of every chapter lists additional information in the "For Information related to this chapter" section. You will find keywords to search for information in POS View Help (Press F1.)
- In the blue sidebar on the left labeled "Things to know...," you will find general conceptual information along with questions and answers about the topic.
- Topics include highlighted information where appropriate, either a Tip, a Caution (Important), or a Note.

1

The Basics

In this chapter

Starting and exiting Point of Sale

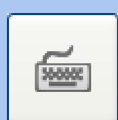
Things to know

Why can’t I exit Point of Sale?

Only those with Owner or Manager roles can exit Point of Sale.

What do I need to do if I am logging on using a touch-screen keyboard?

If you are logging on using a touch-screen, press the touch-screen keyboard button to display the touch-screen keyboard.



To start and log on to Point of Sale

1. On the **Start** menu, point to **(All) Programs**, select **Microsoft Dynamics - Point of Sale**, and then select **Point of Sale**.
2. In the Logon dialog box, type your employee ID and password, and then press ENTER.

To exit or log off Point of Sale

- Press **Tasks**, and then press **Exit**.


F6, then 8

Point of Sale confirms that you want to exit the program.

> **Note**
> Only employees assigned to the Owner or Manager security roles can exit Point of Sale.

Switching users

Things to know

Why log on and off?

Logging on and off provides a secure way for individual cashiers to work.

What is required to log on?

Before you can log on, you must be assigned an employee ID, a password (which you will change), and a security role—Owner, Manager, Supervisor, or Cashier.

What is the best way to complete tasks in Point of Sale?

It depends on the hardware you have installed and your personal preference. There is more than one method of completing the cashier's tasks. You can use a keyboard, mouse, or a touch-screen keyboard.

Is switching users the same procedure as locking a register?

Yes, they are the same procedure used for different purposes.

To switch users

1 Press **Tasks**, and then press **Switch User**.


F6, then 7

-or-

In the tray, choose the **Switch User** button.

The original employee is automatically logged off and Point of Sale displays the **Logon** dialog box.

2 (New user) Enter your employee ID and password, and then press ENTER.

> **Tip**
> You can also use the Switch User command to lock the register. For more information, see "Locking the register."

Introducing the POS View screen

Things to know

What if my screen looks different from the picture in this topic?

You can customize POS View to work the way you do; for example, you can show or hide Windows controls, status bar, task pane, and other features.

For more information, see Chapter 9 "Customizing POS View" later in this book.

Also, certain settings in Manager View will affect how POS View appears. For example, different screen arrangements and task pads are possible.

POS View delivers power, speed, and flexibility at the point of sale. These are its main parts:

1. **View tabs** – Displays POS View or Manager View.
2. **Search box** – Provides a place to type search words to quickly find an item by description or item number or a customer by name or number.
3. **Custom pane** - Displays an HTML file with information, such as store name or store logo.
4. **Task pane** - Displays related tasks or information. For example, if you are searching for a customer, the task pane displays a customer list.
5. **Transaction pane** - Displays transaction information, such as items, prices, sales tax, sales total, customer name, and customer address.

   If an item is displayed in boldface (darker text) in the transaction pane, a discount has been applied to that item.
6. **Tray** - Contains buttons for Help, Switch User, and Exit commands. Also contains buttons for hiding and showing the function bar and the touch-screen keyboard.
7. **Function bar** – Provides menus that are displayed by pressing function keys. For example, pressing F8 displays a menu of commands related to returns.
8. **Status bar** - Displays status information, such as the date and time.
9. **Window controls** – Minimizes, maximizes, and closes the POS View screen.


Microsoft Dynamics - Point of Sale
Enter a number, name, or desc
Items by Description Ctrl 1
Customers by Name Ctrl 2
Discount Item Ctrl 3
Discount Transaction Ctrl 4
No Sale Ctrl 5
Ctrl 6
Cancel Transaction Ctrl 7
Open/Close Ctrl 8
Drop/Payout Ctrl 9
Issue Gift Card Ctrl 0
Point of Sale
Microsoft Dynamics
Friday, October 20, 2006
Sales Transaction
Ref. No.:
Comment:
Item No.
Description
Quantity
Price
Taxable
Extended Price
Select a customer
Shipping Address
Select Customer
Subtotal: $0.00
Tax: $0.00
Total F12
$0.00
Items F2
Customer F3
Transaction F5
Tasks
Tools F7
Return F8
Register 1 - Oliver Cox
On Hold: 0
Friday, October 20, 2006 5:12 PM
1
2
3
4
5
6
7
8
9

Using a keyboard, mouse, or touch screen

Things to know

Do I need a mouse to use Point of Sale?

You will find that POS View is easy to use regardless of whether you use a keyboard, mouse, or a touch screen.

What are "touchless transactions?"

Touchless transaction are transactions in which the cashier does not have to use the keyboard or touch screen.

Why don't my touch screen navigation buttons show?

The touch-screen navigation buttons haven't been turned on. Someone with an Owner or Manager security role can turn them on in Manager View.

Why are the procedures written for touch screens or keyboards instead of a mouse in POS View?

Many cashiers use a touch screen or keyboard, rather than a mouse.

Using a keyboard

If you use a keyboard with POS View, these are the most common actions with their corresponding keys.

- **To move around the screen** – Use the TAB key or a keyboard shortcut. See Appendix B for a complete list.
- **To move to a specific row in a list** – Use the TAB key to move to the list, and then use the DOWN ARROW and UP ARROW keys.
- **To scroll a pane** – Use the TAB key to move to the pane you want, and then use the arrow keys.

Using a touch screen

Use a finger to tap the screen. The following list provides specifics of how to do this.

- **To move around the screen** – Tap the part of the screen you want to work with or tap the TAB key on the touch-screen keyboard.
- **To display or hide the touch-screen keyboard** – In the tray, tap the touch-screen keyboard button.
- **To scroll a pane** – Tap one of the touch screen navigation buttons, tap a scroll arrow, tap the blank area of a scroll bar, or drag a scroll bar.
- **To enter or edit text** – Tap the TAB key to move to where you want to enter text and then tap the keys on the touch-screen keyboard.
- **To select text** – Tap one end of the text, and then drag your finger to the other end. This requires practice to do quickly.

Switching between Manager and POS Views

Things to know

When I press the Manager View tab, nothing happens. Am I doing something wrong?

Only those with Owner or Manager security roles can use Manager View. The option will not be available to those with other roles.

To switch to Manager View

- Press **Tools**, and then press **Manager View**.

  F7, then 8

  -or-

  In the tray, select the **Manager View** tab.

To switch to POS View

- In Manager View, click **POS View** on the **View** menu.

  -or-

  In the tray, click the **POS View** tab.

Note

Only employees assigned to the Owner or Manager security roles can switch between Manager and POS Views.

Changing your password

Things to know

Can another user take over my register?

To allow a different employee to use Point of Sale, the new user must log on. The current transaction is not affected by switching users.

For more information, see “Switching users.”

How can I keep anyone else from knowing my password?

The owner or manager provides a temporary password for your use. To keep your register secure, you must change your password to one that only you know. Blank passwords are not permitted.

To change your password

1 Open the **Logon** dialog box either by restarting Point of Sale or by pressing **Tasks** and then **Switch User.**

F6, then 7

2 Choose **Change Password**.

3 In the **Employee ID** box, type your employee ID.

4 In the **Old Password** box, type your old password.

5 In the **New Password** box, type your new password.

6 In the **Confirm New Password** box, type your new password again, and then press ENTER.

Getting Help

Things to know

Besides POS View Help, what other resources are available?

See the following for other means of finding information:

- POS View Quick Reference Card
- Your manager, who has access to other references and online resources, if needed.

To get Help

1 In the tray, choose the **Help** button, or press F1.

F1

Point of Sale displays POS View Help.

2 To display a topic, select a topic button.

3 To display the Contents, select the **Contents** button. See the Help topic, “Use the Contents.”

4 To display the Index, choose the **Index** button. See the Help topic, “Use the Index.”

5 To print a topic, choose the **Print** button. See the Help topic, “Print a Help topic.”

6 To close Help, choose the **Close** button.

Using practice mode

You can practice using POS View in practice mode without affecting the information in your store database.

To enter practice mode

- Select **Tools**, and then select **Enter Practice Mode**.

F7, then 6

To exit practice mode

- Select **Tools**, and then select **Exit Practice Mode**.

F7, then 6

Note

An employee assigned to the Owner or Manager security role must provide access to practice mode in Manager View before you can use it in POS View.

Things to know

In practice mode, does everything in POS View work normally?

Most features work normally. However, the sales you ring up in practice mode will not be kept, the cash drawer will not open, and credit card, debit card, and check transactions will not be processed.

How will I know that I am in practice mode?

The practice mode screen is noticeably different.

How can I use practice mode?

You can only use it is your manager has set it up in Manager View. See your manager if you would like to learn Point of Sale in practice mode.

2

Working with POS Hardware

In this chapter

Adding and removing hardware

Things to know

Do I need to install software for each device?

Typically, the device's manufacturer provides OPOS software and configuration software on a CD that accompanies the device.

Why don't I see the hardware that I want to add in the "Available devices" list?

The device might not be connected properly to your computer.

Can the hardware be unplugged and plugged back in during a transaction?

During a transaction, do not unplug a POS hardware device and then plug it in again. This will cause errors in the transaction.

For more information...

View the tutorial "Setting Up POS Hardware," which is included on the Point of Sale CD.

You can connect one or more POS hardware devices to your computer; for example, a cash drawer, receipt printer, bar code scanner, check reader (MICR), PIN pad, magnetic stripe reader (MSR), or signature capture device.

To add POS hardware

1. Connect the device to the register computer according to the manufacturer's instructions.
2. Configure and test the device using the device's configuration utility.
3. Start Point of Sale, and log on with your employee ID and password.

   The Register Properties dialog box appears.
4. In the **Available devices** list, select the new hardware using the arrow buttons in the dialog box, and then set the properties for each device.
5. Test the hardware.

> **Note**
>
> Only employees assigned to the Owner, Manager, *or* Supervisor roles can add hardware.

Can I connect a device to another device rather than directly to the computer?

Some hardware devices can be connected to a second device, which is then connected to the computer. For example, you can connect:

- a cash drawer, line display, or MICR/printer to a receipt printer.
- an MSR or PIN pad to a signature capture device.

If a device is not working, you may have too many secondary connections.

Should I install my hardware devices or my Point of Sale software first?

Install your hardware first. While you can add and remove hardware devices at any time, installing them before installing Point of Sale can make the installation process go more smoothly.

To remove POS hardware

1. Disconnect the hardware device from the computer.
2. In Windows Control Panel, double-click **Add or Remove Programs,** and then remove the device's software.
3. Restart Point of Sale.

To stop using a specific device

1. Press **Tools**, and then press **System**, or press

    F7, then 7

2. Press **Register Properties**, or press

    CTRL+2

3. In the **Selected devices** list, select the device you want, and then select the left-arrow button to move the device to the **Available devices** list.
4. Restart Point of Sale.

Testing your hardware

It is a good idea to test your hardware before trying to use it in your store operations.

Note

Only employees assigned to the Owner, Manager, *or* Supervisor roles can test hardware.

To test POS hardware

1 Press **Tools**, and then press **System**.

F7, then 7

2 Press **Test Hardware**.

CTRL+3

Point of Sale displays the Test Hardware dialog box with a list of the devices connected to the computer.

3 Select the device you want to test, and then click **Test**:

- Cash drawer – Select **Open Cash Drawer** and check that the cash drawer opens properly.
- Line display – Check that the line display displays the test message correctly.
- Magnetic ink character recognition device (MICR) – Check to see that the account number displays in the Account number box.

Things to know

What hardware is compatible with Point of Sale?

You can find a current list of compatible hardware at the Point of Sale Web site at www.microsoft.com/pos

Other hardware may be compatible, but Microsoft recommends using devices that are known to be compatible.

My hardware isn't working. What are some troubleshooting tips?

- Did you use the proper cable to connect each device?
- Do you have devices connected to each other? Using more than two or three secondary connections might create problems.
- Did you use the appropriate port connection?
- Did you install the appropriate software for each device?

Things to know

When I run a test on my magnetic stripe reader (MSR), the number appears masked with X's in place of digits. Is that a successful test or not?

Yes, this also means that the stripe reader read the credit card number.

For more information…

View the tutorial "Setting Up POS Hardware," which is included on the Point of Sale CD.

- Magnetic stripe reader (MSR) – Swipe a credit card to see if the credit card number displays correctly in the Account number box.
- PIN pad – Perform a debit transaction to check if the PIN pad is working correctly. There is no test available.
- Receipt printer – Perform a transaction to see that the printer prints receipts properly.
- Scanner – Scan a bar code to see if correct data appears in the Scanner data box.
- Signature capture device – Write your signature on the device, and then choose **Stop Capture** to check that the device is working correctly.

4 If any of the hardware does not work correctly, run the setup and configuration utility provided by the device's manufacturer.

Turning the receipt printer on and off

Things to know

Why can't I print a receipt? My hardware test indicates that it is working.

You may not have turned the printer on in Point of Sale. If this does not solve the problem, check your connection.

- Press **Tasks**, and then press **Printer On/Off**.


F6, then 5

3

Performing Sales Transactions

In this chapter

In this chapter, continued

Processing a sales transaction

Things to know

If the customer or I are not able to swipe a card, what do I need to enter manually?

You will need to type the account number, expiration date, and approval code in the Verification dialog box.

Is there a shortcut to totaling a transaction?

Yes, if the customer pays the exact amount, you can total the transaction by pressing Total and then a plus (+) sign regardless of the payment method.

Adding items is the first step in processing a sales transaction. There are several ways to add items to a transaction:

- Scan the item’s bar code.
- Type all or part of the item number.
- Type all or part of the item’s description.

To process a sales transaction

1. Scan an item's bar code.

   -or-

   Type the item number in the search box, and then press ENTER.

   Point of Sale adds the item to the transaction and displays a "1" in the **Quantity** column.

2. If there are two or more units of an item, choose **Edit Qty.** on the line item and type the quantity.

   You can also scan the item repeatedly to increase the quantity.

3. Repeat Steps 1 and 2 for each item.

4. Total the transaction in one of the following ways.

   - Cash or check: Press **Total (F12),** type the amount paid in the box for the payment method, and then press ENTER.
   - Credit card or debit card: Swipe the card, press **Total (F12),** type the amount of the sale next to the payment method used, and press ENTER.

Things to know

What should I do if the bar code scanner does not read the item number?

You can type the item number in the Search box and press ENTER.

What if I do not know the item number and there is no bar code on the item?

You can add the item by its description.

What should I do if the item is not yet in inventory?

You can easily add the item during the transaction. For more information, see “To add a new item to inventory” in this topic.

For more information…

See “Process a sales transaction” in POS View Help.

5 To post the transaction, choose **Close** or press ENTER.

> **Note**
> When voiding a previous transaction, Point of Sale displays the Post Transaction dialog with the original payment amount.

To add an item by scanning

- Scan the item's bar code.

To add an item by item number

- Type the item number in the search box, and press ENTER.

To add an item with a serial number

- When Point of Sale asks you to enter the serial number type the serial numbers into the appropriate boxes (if store policy allows serial numbers to be created at the register), or choose **Find No.** to select from a list of serial numbers.

To add an item by description

1 Press **Items**, and then press **By Description**.

F2, then 5

2 Find the item in the **Items By Description** list and select it.

3 Choose **Add** or press ENTER.

What should I do if I have already added an item that the customer no longer wants?

It is easy to remove items from the transaction at any time. For more information, see "To remove an item" in this topic.

When the customer decides to buy more of an item, how can I change the quantity of a line item in the transaction?

See "To change the quantity" in this topic on the right.

How will my time on a registered be tracked?

Any employee who uses a register must clock in and out to show when they were at a particular register.

To change the quantity

1 In the transaction pane, select the line item whose quantity you want to change.

2 Do one of the following:

- On the line item, choose **Edit Qty.**, and then type the new quantity.

-or-

- (Mouse users only) Click the number in the **Quantity** column, and then type the new quantity.

To add a new item to inventory

- Press **Items**, and then press **New**.

F2, then 1

To remove an item

1 Select the line item you want to remove.

2 On the line item, choose **Remove**.

-or-

Press **Transaction**, and then press **Remove Line Item**.

F5, then 3

Checking prices and other information

Things to know

How do I remove an item from the transaction, if after I check the price, the customer doesn't want the item.

Choose Remove on the line item.

How can I help customers find more information about an item?

Use the instructions in this topic to find information about an item. You can look for an item by scanning its bar code or by entering its item number or description.

How do I find out how many of an item is in stock?

Use the instructions in this topic. You can see the in-stock quantity in the search results and in the item information.

How can I find out if a particular item is on sale?

Choose More at the bottom of the task pane, and then choose the Pricing tab.

To find item information by item number

1 Scan the item's bar code.

-or-

Type the item number in the search box and press ENTER.

2 In the transaction pane, select the line item and choose **View**.

3 To view more information, choose **More** in the task pane.

To find item information by description

1 Type the item's description in the search box, and then press ENTER.

2 Select the item in the **Search Results** list.

3 Select **View/Edit**, and if applicable, view more information by choosing **More**.

To find item information in the item list (mouse users only)

1 Select **Items**, and then select **By Description**.

F2, then 5

2 In the **item** list, click the column headings to sort the list by item number, description, or price.

3 Type all or part of an item number, description, or price.

Accepting cash payment

Things to know

What payment methods are accepted by Point of Sale?

The store's manager or owner will have decided which payment method methods are accepted by your store and will have set them up in Manager View.

These payment methods can include:

- Cash
- Check
- Credit card
- Debit card
- Gift card

What about money orders and traveler's checks?

These payment methods are usually considered as cash payments. Check your store's policy for more information.

For more information...

See "Process a sales transaction" in POS View Help.

To accept cash

1 Scan or enter the customer's items.

2 Press **Total**.

F12

3 In the **Payment** list, type the amount paid by the customer in the **Cash** box, and then press ENTER.

-or-

In the **Payment** list, select the cash payment method, and then press the plus (+) key to automatically enter the exact amount of the sale and post the transaction.

Tip

If the customer pays with the exact amount, you can select the payment method and then press the plus key (+) to automatically enter the exact amount of the sale and post the transaction.

Accepting a check as payment

Things to know

If I have a check reader, will I need to enter anything manually when processing checks for payment?

If you have a check reader (MICR), information will be entered automatically when you insert the check into the device.

What should I do if I have already chosen OK, and then I change my mind about contacting the check processor?

Choose Abort.

Why can't I view a Check Verification dialog box?

The Check Verification dialog box will only appear if check processing has been set up in Manager View.

To accept a check

1 Scan or enter the customer's items.

2 Press **Total**.

F12

3 In the **Payment** list, select **Check**, type the amount paid, and then press ENTER.

-or-

In the **Payment** list, select **Check**, and then press the plus (+) key to automatically enter the exact amount of the sale. If your store uses a check verification service or check reader (MICR), enter the information required.

If you have a MICR device (check reader), the transit number, account number, and check number will be entered automatically when you insert the check into the device.

Tip

If the customer writes the check for the exact amount, select the payment method and then press the plus key (+) to automatically enter the exact amount of the sale and post the transaction.

Accepting a credit card as payment

Things to know

Which credit cards can I accept?

The cards that you can accept depends on your store’s policy. Payment methods for each particular card will have been set up beforehand in Manager View.

Each of these card types will appear in the Total pane along with the other payment methods your store accepts.

Can I accept multiple credit cards or a credit card and another payment method?

Yes. For more information, see “Accepting multiple payment methods” in this chapter.

To accept a credit card as payment if the customer is paying the full amount by credit card and the store uses a MSR device with online approval

1 Scan or enter the customer's items.

2 Do one of the following:

- Swipe the customer's credit card.

  Point of Sale displays the Electronic Draft Status dialog box during the approval process.

  -or-

- Press **Total**.

F12

- In the **Payment** list, select the box for the appropriate credit card, and then press the plus (+) key to automatically enter the exact amount of the sale, and then swipe the customer’ credit card when Point of Sale displays the **Credit Card Verification** dialog box.

To accept a credit card as payment if the customer is paying a partial amount by credit card and the store uses a MSR device with online approval

1 Scan or enter the customer's items.

What happens if I type the verification information incorrectly for a credit card?

Errors in the verification dialog box could lead to lost revenues for the store. If you type the information yourself, carefully review the data you've entered. When you are sure the information is accurate, press ENTER to begin processing the transaction.

For more information...

See “Process a sales transaction” in POS View Help.

2 Press **Total**,

 F12

3 In the **Payment** list, type the partial payment amount in the box for the appropriate credit card, and then press ENTER.

4 When Point of Sale displays the **Credit Card Verification** dialog box, swipe the customer's credit card.

To accept a credit card as payment if you call the bank to receive voice authorization

1 Scan or enter the customer's items.

2 Press **Total**.

 F12

3 In the **Payment** list, type the sale amount in the box for the appropriate credit card and press ENTER.

4 When Point of Sale displays the **Credit Card Verification** dialog box, type the approval code you received from the bank, and then either swipe the customer's credit card or type the credit card number and expiration date.

Accepting a debit card as payment

Things to know

What is the difference between the two types of debit cards that customers use?

One of them is usually referred to as an ATM card for which the customer must enter a PIN. With other debit cards, commonly referred to as *check cards* and usually bearing a card association logo, the card can be accepted using either a debit card or credit card payment method. Customers can choose which way they want to pay.

To accept a debit card

1. Scan or enter the customer's items.
2. Press **Total**.

   
   F12

3. In the **Payment** list, select **Debit card**, and then press the plus key (+).

   -or-

   In the **Payment** list, select **Debit card**, and then enter the amount of the sale.

4. Type the cash back amount, if applicable.
5. Swipe the debit card.
6. Ask the customer to use the PIN pad to enter a PIN and okay the amount.
7. (If applicable) Pay the customer the cash back amount.

> **Note**
>
> If the payment method is a debit card, Point of Sale displays a verification dialog box in which you must enter information or swipe the card to enter the information automatically. After approval, Point of Sale returns to the Payment list.

Accepting a gift card as payment

Things to know

Will the balance left on the gift card appear on the receipt for the transaction?

It depends on how this option was set up in Manager View, but the built-in receipt formats support printing the card's remaining balance on the receipt.

To accept a gift card as payment

1 Scan or enter the customer's items.

2 Press **Total**.

F12

3 Swipe the gift card.

-or-

In the **Payment** list, select the gift card payment method, and then type the amount the customer wants to pay by gift card.

-or-

In the **Payment** list, select the gift card payment method, and then enter the amount paid.

4 If Point of Sale displays the **Gift Card Verification** dialog box, type the gift card number or swipe the gift card, and then press ENTER.

Accepting traveler's checks as payment

Things to know

Does it matter whether I enter Cash or Check for a traveler's check as payment?

Yes, you must follow your store's policy. Ask your manager if you aren't sure.

To accept traveler's checks

1. Scan or enter the customer's items.
2. Press **Total**.

    F12

3. In the **Payment** list, type the check amount in the box for the appropriate payment method (**Cash** or **Check**, according to store policy), and then press ENTER.

   -or-

   In the **Payment** list, select the box for the appropriate payment method, and then enter the amount tendered and post the transaction.

Tip

If the customer pays with the exact amount, you can select the payment method and then press the plus key (+) to automatically enter the exact amount of the sale and post the transaction.

Accepting a money order as payment

Things to know

Does it matter whether I enter Cash or Check for a money order as payment?

Yes, you must follow your story policy. Ask your manager if you aren't sure.

To accept a money order

1. Scan or enter the customer's items.
2. Press **Total**.

   F12

3. In the **Payment** list, type the check amount in the box for the appropriate payment method (**Cash** or **Check**, according to store policy), and then press ENTER.

   -or-

   In the **Payment** list, select the box for the appropriate payment method, and then enter the amount tendered and post the transaction.

> **Tip**
>
> If the customer pays with the exact amount, you can select the payment method and then press the plus key (+) to automatically enter the exact amount of the sale and post the transaction.

Accepting multiple payment methods

Things to know

Which payment methods can be combined in one transaction?

Any combination of two or more payment methods can be made. For example, a customer might want to pay with two credit cards or part cash and part check.

To accept multiple payment methods

1 Scan or enter the customer's items.

2 Press **Total**.

F12

3 In the Payment list, select the first payment method, and then type the amount paid with that method.

> **Note**
>
> If the payment method is a credit or debit card, Point of Sale displays a verification dialog box in which you must enter information or swipe the card to enter the information automatically. After approval, Point of Sale returns to the Payment list.

4 Select the second payment method, and then type in the amount paid with that method.

5 If there are other payment methods, enter them in the same way.

6 When finished entering payments, press ENTER.

4

Working with Your Register

In this chapter

Changing register settings

Things to know

Who can change register settings?

Only employees assigned to the Owner, Manager, or Supervisor roles can change register settings.

Are there any precautions that I need to take when using my register?

Yes, during a transaction, do not unplug a POS hardware device and then plug it in again. This could cause errors in the transaction.

Each computer in your store that has Point of Sale installed is a *register*. You can change the settings for each register. These settings include the register number and description, audio settings, and hardware devices in use at the register.

Register 1 is usually your store's main computer and the location of your store database. It may not actually be used to process transactions, but it is still considered a register.

To change register settings

1 Press **Tools**, and then press **System**.

F7, then 2

2 Press **Register Properties**.

CTRL+2

3 Change the settings you want.

- To specify what sounds are played for certain register events, select a setting in the **Audio settings** list.
- To select or remove a hardware device for use on the register, use the arrow buttons under **Devices on this register** to move the device from one list to the other.

If my register is not set up in the best configuration for me, what can I do if I am not allowed to change the settings?

Discuss with your manager or store owner the various ways POS View can be customized for your needs.

Why doesn't Microsoft recommend using keyboard POS hardware devices?

They might not work correctly with Point of Sale. See the note on the right.

> **Note**
>
> Select USB Keyboard MSR, Wedge Keyboard MSR, or Wedge Keyboard Scanner only if OPOS software is not available for your device. Microsoft does not recommend using keyboard POS hardware devices. Depending on the device, keyboard devices might not work properly with Point of Sale.
>
> If OPOS software is available for your device, ensure that it is installed properly. Make sure the device is connected and configured properly, restart Point of Sale, and then select the device in the "Available devices" list.

- To change the settings of a hardware device (such as selecting a receipt format for a printer), select the device, and then choose **Properties**.
- To save in the store database copies of receipts for this register's transactions, choose **Save electronic copies of receipts**.

4 Press ENTER, and then restart Point of Sale for the changes to take effect.

Things to know

How will my time on a register be tracked?

Depending on your store’s policies, cashiers should clock in and out o record when they use a particular register.

What if I forget to clock in or out?

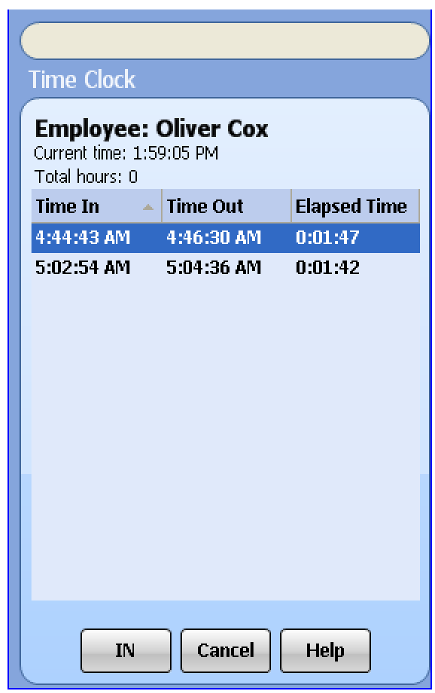
Let your manager know. Your manager can correct the problem in Manager View.

To clock in and out

1. On the function bar, press **Tools**, and then press **Time Clock**.

    F7, then 2

2. In the **Time Clock** dialog box, type your employee ID in the **Employee ID** box.
3. In the **Password** box, type your password, and then press ENTER.
4. Under **Time Clock**, make sure that your name appears.
5. Choose **IN** to clock in, or choose **OUT** to clock out.



Locking the register

Things to know

When should I lock my register?

When you need to interrupt a transaction or step away from the register for some reason, lock the register for security.

Will it affect a transaction if I lock the register in the middle of a transaction?

The current transaction is not affected by locking the register.

Is locking a register the same procedure as switching users?

Yes, they are the same procedure used for different purposes.

To lock the register

1 Press **Tasks**, and then press **Switch User**.

 F6, then 7

-or-

In the tray, choose the **Switch User** button.

The employee is automatically logged off and Point of Sale displays the Logon dialog box.

2 When you are ready to resume, enter your employee ID and password.

Note

You cannot cancel the Logon dialog box. You must enter an employee ID and password to resume use of Point of Sale. Only employees assigned to the Owner, Manager, or Supervisor roles can exit Point of Sale.

Using the cash drawer

Things to know

When can the cash drawer be opened?

The cash drawer automatically opens at the end of a transaction. But, there are three other situations that also involve opening the cash drawer:

- When making a cash drop
- When making a cash payout
- When no cash will be removed from the cash drawer

What is a cash drop?

Cash drop refers to reducing the amount of cash in the cash drawer.

The cash drawer opens automatically at the end of a sales transaction, but you can also open it whenever you need to.

Note

Only employees assigned to the Owner, Manager, or Supervisor roles make cash drops or cash payouts.

To make a cash drop

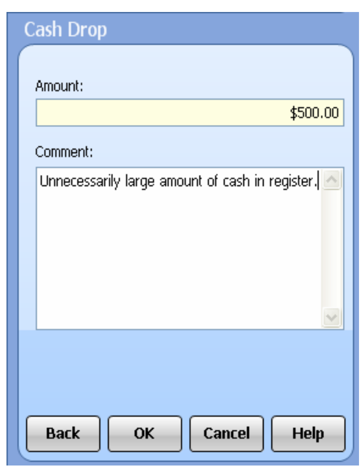
1 Press **Tasks**, and then press **Drop/Payout**.

F6, then 2

2 Press **Cash Drop**.

CTRL+1

3 Under **Cash Drop**, type the amount of cash that was removed, and then type a comment.



What is a cash payout?

Cash payout refers to removing a small amount of money from the cash drawer for a specific purpose, such as to pay for a minor expense.

Can I open the register when I don't intend to remove cash from it?
There may be times that you need to open the cash drawer that does not involve removing any cash. In those situations, opening the cash drawer is considered a "No Sale" transaction. Only those with Owner, Manager, or Supervisor roles can remove cash for cash drops or payouts, however.

To make a cash payout

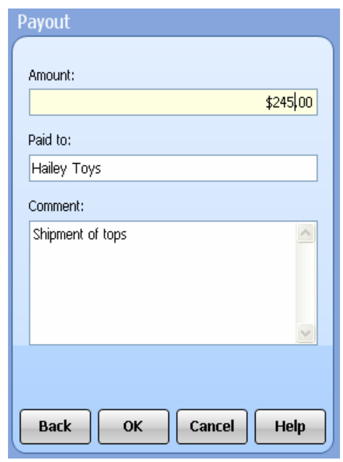
1 Press **Tasks**, and then press **Drop/Payout**.

F6, then 2

2 Press **Payout**.

CTRL+2

4 Under **Payout**, type the amount of cash that was removed, enter who was paid in the **Paid to** box, and type a comment.



To open the cash drawer

- Press **Transactions**, and then press **No Sale**.

F5, then 6

Opening and closing a register

Things to know

Why is it necessary to specify an opening amount when switching users or beginning to use my register?

It is important so that Point of Sale can track how much money is added to the cash drawer during the current batch.

How do you open the register?

Closing the register closes one batch and automatically opens a new batch.

What's the best way to count currency when opening and closing?

If denominations (such as $0.10, $0.25, $5.00, and $10.00) have been set up for a cash payment method, you can select the Calculator button to display the currency calculator and quickly count various denominations of currency. If denominations have not been set up, pressing the calculator button displays the Windows Calculator.

Note

Those with the Cashier's role cannot enter opening or closing amounts.

To specify opening or closing amounts

1 Press **Tasks**, and then press **Open/Close**.

F6, then 1

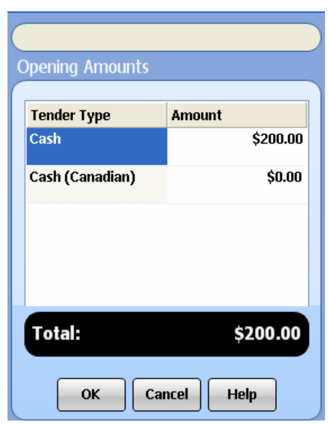
2 Press **Opening Amounts** or **Closing Amounts**.

CTRL+1 for opening

CTRL+2 for closing.

If an amount has already been entered, a message will ask if you want to overwrite it.

3 Select a payment method, type the amount that is in the cash drawer, and then press ENTER or choose **OK**.



What is the difference between opening a register and opening the cash drawer?

Opening the register is an automatic process that happens when you print a Z report (close the previous batch).

The cash drawer opens automatically at the end of a sales transaction, but you can also open it whenever you need to, if you are assigned to the Owner, Manager, or Supervisor roles. Cashiers will need to ask someone assigned the Owner, Manager, or Supervisor role to do it for them.

What does closing the register mean?

When you close the register you print a Z report to view the end of day statistics for a register. You must enter a closing amount before you close the current batch with a Z report showing the total amount added.

To close a register (batch)

1 Press **Tasks**, and then press **Open/Close**.

F6, then 1

2 Under **Open/Close**, press **Z Report**.

CTRL+4

Using the calculators

Things to know

Why don't I see the currency calculator button?

If denominations (such as $0.10, $0.25, $5.00, and $10.00) have been set up for a cash payment method, the Calculator button displays the currency calculator. If denominations have not been set up, the calculator button displays the Windows Calculator.

You can use Point of Sale's currency calculator or the Windows calculator to save time counting currency during a transaction and while entering opening or closing amounts.

The currency calculator automatically adds the value of each denomination and then gives you a total amount.

To be able to use the currency calculator, denominations must be set up in Manager View, and the currency calculator must be enabled. For more information, see the *Manager's Guide* or Manager View Help.

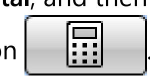
To use the Windows calculator

1 Press **Tools**, and then press **Calculator**.

F7, then 1

2 On the **View** menu of the **Calculator**, select a view (**Standard or Scientific**).

To use the currency calculator while totaling a transaction

1 In a transaction, press **Total**, and then choose the currency calculator button .

F12

2 Enter the quantities for each denomination.

Point of Sale automatically calculates the value for each denomination, as well as the total amount.

How does the currency calculator save me time?

The currency calculator saves time because it automatically adds the value of each denomination and then gives you a total amount in the cash drawer when opening or closing a batch or when tendering a transaction.

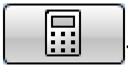
To use the currency calculator while entering opening and closing amounts

1 Press **Tasks**, and then press **Open/Close.**

F6, then 1

2 Press **Opening Amounts** or **Closing Amounts**.

CTRL+1 (Opening) or CTRL+2 (Closing)

3 Choose the currency calculator button .

> **Note**
>
> To be able to use the currency calculator, denominations must be set up in Manager View, and the currency calculator must be enabled. For more information, see the *Manager's Guide* or Manager View Help.

4 Enter the quantities for each denomination in your cash drawer.

Point of Sale automatically calculates the value for each denomination, as well as the total amount in your drawer.

Things to know

What purpose does the sales graph serve?

A sales graph shows you how sales were distributed during a specific period of time, for a specific group of items.

For example, you can create a sales graph that shows current sales in each department. Another graph might show year-to-date sales by register.

Can I see the sales information in numerical form?

Each graph shows sales information both as a set of numbers and as a graph.

Note

Only employees assigned to the Owner, Manager, or Supervisor roles create a sales graph.

To create a sales graph

1 Press **Tools**, and then press **Graphs**.

F7, then 3

2 In the **Group data by** box, choose **Browse** to select a data grouping.

3 In the **Show totals for** box, choose **Browse** to select a general time period.

4 In the **Date** box, type a date as mm/ dd/yyyy, and then press ENTER.

5

Finding What You Want

In this chapter

Using the search box to find information
- Find information about items or customers
- Find information in lists using the search box

Finding items
- Find an item by number
- Find an item by description
- Find an items purchased by a customer
- Find a substitute item

Finding customers
- Find a customer by name
- Find a customer by customer number
- Find a customer by phone number

Finding transactions
- Find and view a transaction's receipt
- Find a transaction by using a receipt's bar code

In this chapter, continued

Using the search box to find information

The search box located at the top of the task pane can help you quickly find:

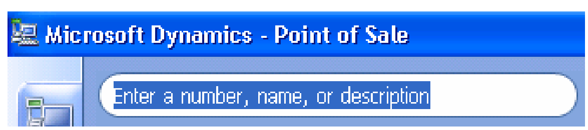
- Items
- Customers
- Information in lists

Use the search box to find items and customers when Point of Sale displays a menu of commands in the task pane. (These commands have CTRL+*number* buttons.)

You can also use the search box to find information when Point of Sale displays a list in the task pane. Lists include items, customers, receipts, batches, customers' shipping addresses, transactions in customers' purchase histories, transactions on hold, and time clock entries.

To find information about items or customers using the search box

1 Type all or part of an item number, item description, customer number, or customer name.



2 Press ENTER.

-or-

To search only for items or customers, press **Items** or **Customers**, and then press **Search**.

F2 for items or F3 for customers

Things to know

Will the search find only key words or any word in a description, number, or name?

The characters you type can appear anywhere in the item description, item number, customer name, or customer number. For example, if you type "ball," the results displayed by Point of Sale could include the following:

- Blue Ball (item description)
- Ball Carrier (item description)
- Frank Ballwright (customer name)

How do I find information in lists using the search box?

The information that Point of Sale searches for depends on how the list is organized. For example, if a list of items is sorted by item number, you can only search for an item by typing its item number.

To search in a list using different information, click or press a column heading to sort the list by the information in that column, and then type the information you are searching for. For example, to search for an item description in a list of items, press the Description heading to sort the list by description, and then type the description of the item you are searching for.

Point of Sale displays a list of items and/or customers whose names or numbers contain the characters you typed.

3 Select an item or customer, and then choose **View/Edit** to view information about the item or customer.

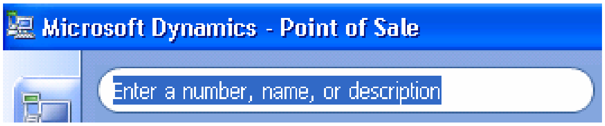
-or-

Choose **Add** (or press ENTER) to add the item or customer to the current transaction.

To find information in lists using the search box

- Type all or part of the information you are looking for in the search box.

  For example, if you are looking for a receipt in a list of receipts organized by transaction number, type all or part of the transaction number.



  Point of Sale moves the selection in the list as you type.

Finding items

Things to know

If I only know the item number, how can I find the item?

There are several ways to find an item using the item number:

- Search box
- Function keys
- Scanning a bar code

Use the instructions on the right in “To find items by number” to find the item. After you have located the item that you want, you can add the item to the transaction.

If I know the item description but no other information, how can I find the item?

There are two ways to find an item using its description:

- Search box
- Function keys

Use the instructions on the right in “To find items by description” to find the item. After you have located the item that you want, you can add the item to the transaction.

To find items by number

1 In the search box, type all or part of the item number, and then press ENTER.

-or-

Scan the item's bar code.

If your store issues customer cards with bar codes, you can also scan a customer's bar code.

-or-

Press **Items**, and then press **By Item Number**, and then type all or part of the item number.

F2, then 4

2 Select the item in the list.

If multiple matches were found, select the item you were searching for.

3 To view detailed information, choose **View/Edit**.

-or-

To add the item to the current transaction, choose **Add** (press ENTER).

To find items by description

1 In the search box, type all or part of the item number, and then press ENTER.

What are my options if I tried everything and I am still not able to find a match?

You can:

- Create a new item.
- View all the items in inventory

How far back does a customer's purchase history go?

The History tab displays customer purchases made within the time period specified in Manager View, such as the last 30, 60, or 90 days.

A customer's complete purchase history is available in Manager View.

When viewing the History tab, will Point of Sale create a transaction for a returned item if I press ENTER instead of ESC?

Yes, you must be careful to always press the key that you want.

-or-

Press **Items**, and then press **By Description,** and then type all or part of the item number.

F2, then 5

2 Select the item in the list.

If multiple matches were found, select the item you were searching for.

3 To view detailed information, choose **View/Edit**.

-or-

To add the item to the current transaction, choose **Add** (press ENTER).

To find items purchased by a customer

- If the customer has already been added to the transaction, choose **Purchase History** in the transaction pane to display the **History** tab.

-or-

1 In the search box, type the customer name or customer number, and then press ENTER.

2 Select the customer, choose the **View/Edit** button next to the customer's name, and then choose the **History** tab.

Is it possible to substitute one item for another?

Yes, if substitute items have been specified for an item in Manager View, you can replace a line item with a substitute item.

Can I add a substitute item without replacing the original item?

If a line item is selected but not highlighted, the button in the list of substitutes will say Add. In that case, choose Add to add the substitute item to the transaction without replacing the original item.

How can I select a line item using the keyboard arrow keys?

Press TAB to move the focus to the transaction pane and then use the arrow keys to move the highlight up or down to the item. If an item is not highlighted in the transaction pane, the keyboard arrow keys will not function. The on-screen arrow keys work regardless of focus.

3 After you finish viewing the customer's purchase history, press ESC.

> **Warning**
>
> If you press ENTER or the Return button when viewing the History tab for a selected item, Point of Sale begins a return for the item.

To find a substitute item

1 In the transaction pane, select the item that you want to find a substitute for.

2 Press **Items**, and then press **Substitutes**.

F2, then 6

3 In the list of substitutes, select a substitute item, and then choose **Replace**.

> **Note**
>
> If a line item is selected but not highlighted, the button in the list of substitutes will say Add. In that case, choose Add to add the substitute item without replacing the original item.

The substitute item appears in place of the original.

Finding customers

Things to know

If I only know the customer's name, how can I find the customer's record?

There are two ways to find customers by name:

- Search box
- Function keys

Use the instructions on the right in "To find customers by name" to find the customer. After you locate the customer, you can view or edit the information or add the customer to a transaction.

How can I find a customer's record if I only know the customer's customer number?

There are several ways to find a customer by customer number:

- Search box
- Function keys

Use the instructions on the right in "To find customers by name" to find the customer. After you locate the customer, you can view or edit the information or add the customer to a transaction.

There are several ways to find customers in POS View:

- By name
- By customer number
- By phone number

To find customers by name

1 In the search box, type all or part of the customer's name, and then press ENTER.

-or-

Press **Customer**, press **By Name**, and then type all or part of the customer's name.

F3, then 5

2 In the list, select the customer.

3 To view the customer's information, choose **View/Edit.**

-or-

To add the customer to the current transaction, choose **Add** (press ENTER).

To find customers by customer number

1 In the search box, type all or part of the customer's number, and then press ENTER.

-or-

Press **Items**, and then press **By Customer No.** , and then type all or part of the customer's number.

F2, then 4

2 In the list, select the customer.

3 To view the customer's information, choose **View/Edit.**

-or-

To add the customer to the current transaction, choose **Add** (press ENTER).

To find a customer by phone number

1 In the search box, type all or part of the customer's phone number, and then press ENTER.

-or-

Press **Customer**, press **By Phone Number**, and then type all or part of the customer's phone number.

F3, then 6

2 In the list, select the customer.

3 To view the customer's information, choose **View/Edit.**

-or-

To add the customer to the current transaction, choose **Add** (press ENTER).

If I know the customer's telephone number, how can I find the customer's record?

There are several ways to find a customer using the customer number:

- Search box
- Function keys

After you have located the customer that you want, you can view or edit the customer information or add the customer to the transaction.

What are my options if I tried everything and I am still not able to find a match?

You can:

- Create a new customer.
- View all the customers in the customer list.

Finding transactions using a receipt

Things to know

What can I do with a receipt once I have found it?

When you have found the receipt that you want, you can do any of the following:

- Print the information
- View the information
- Recall it to void the transaction
- Recall it for a return or exchange

How do I void the transaction after finding it?

After you find the transaction, choose Select, and then press Recall for Void. You can void a previous transaction only on the originating register and in the current batch. If the transaction is from a closed batch, you must process it as a return.

There may be times that you need to see information that is on a receipt. You can find a receipt by searching

- Today's receipts (only those for the current date)
- Receipts within a date range
- Receipts in a batch (a list of receipts by batch number)

To find and view a transaction's receipt

1 Press **Tasks**, and then press **Find Receipts**.

F6, then 3

2 In the task pane, under **Find**, do one of the following:

To find	Press	Then
Today's receipts	CTRL+1	Search for the receipt by time of day.
Receipts by date	CTRL+2	Type a start date and an end date, and then press ENTER.
Receipts by batch	CTRL+3	Select a batch, and then press ENTER.

If I have a receipt, can I scan its bar code to locate the transaction?

If you have a scanner attached to your register, and you have a receipt for the transaction you are looking for, you can scan the receipt's bar code to find the transaction in Point of Sale. If the bar code is missing or unreadable, you can look up the receipt using one of the methods explained in this section. When you have found the receipt that you want, you can view or print the information, void the transaction, or recall it for a return or exchange.

3 Press the following keys to select a receipt, and then press ENTER.

To	Press
Scroll down one line	↓ (DOWN ARROW)
Scroll up one line	↑ (UP ARROW)
Scroll down one page	PgDn (PAGE DOWN)
Scroll up one page	PgUp (PAGE UP)

4 Press TAB, and then press the following keys to change the view of the receipt.

To	Press
Zoom in or out	+ (PLUS SIGN), - (MINUS SIGN)
Scroll up or down	↑ (UP ARROW) ↓ (DOWN ARROW)
Scroll right or left	→ (RIGHT ARROW) ← (LEFT ARROW)
View the next or previous page of the current receipt	PgDn (PAGE DOWN), PgUp (PAGE UP)

5 You can also choose one of the following receipt options. (These options will vary depending on the type of receipt you are viewing.)

How can I print the receipt after I find it?

Once you have the receipt that you want, select it, and then under Receipt Options, press Print (CTRL+1)

How can I find the receipt if the bar code is missing or unreadable?

Use the previous procedure, “To find and view a receipt.”

- Press **Print** (CTRL+1) to print the receipt.
- Press **View Payment Information** (CTRL+2) to view the receipt's transaction number, payment method, and payment amount.
- Press **Printer Setup** (CTRL+3) to display printer settings.
- Press **Recall for Return** (CTRL+4) to recall the transaction for a return or exchange.
- Press **Recall for Void** (CTRL+5) to void the transaction.

To find a transaction using a receipt’s bar code

1 Scan the bar code on the receipt.

Point of Sale displays the receipt and Receipt Options.

2 You can choose one of the following receipt options.

- Press **Print** (CTRL+1) to print the receipt.
- Press **View Payment Information** (CTRL+2) to view the receipt's transaction number, payment method, and payment amount.
- Press **Printer Setup** (CTRL+3) to display printer settings.
- Press **Recall for Return** (CTRL+4) to recall the transaction for a return or exchange.
- Press **Recall for Void** (CTRL+5) to void the transaction.

Using a basic search to find information

Things to know

What do the options in the Find window do?

The following describes what you do for each option

- **Look for**: Select what you want to search for.
- **Search for this text:** Enter text that may help you find the results you are searching for.
- **In these fields**: Limit your search to certain kinds of information.
- **All items, Only these departments, Only these categories, Only these suppliers:** Select one of these to further limit your search.
- **Find Now:** Starts the search.
- **New Search:** Clears the current search criteria, so you can start a new search.

There may be times that you need to look for more detailed information than the search box can provide. The basic and advanced searches fulfill this need. In a basic search, you can limit your search to certain kinds of information; for example, search only suppliers or specific categories. In an advanced search, you can be even more specific using Boolean search criteria.

After you have search results, you can then edit, view, or select items in the list of results.

To find items with a basic search

1. Press **Tools**, and then press **Find**.

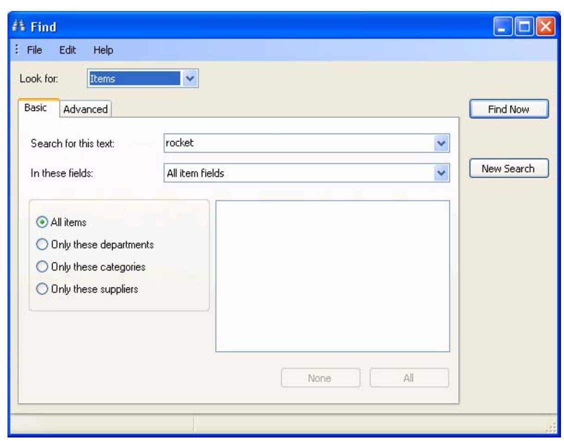
   

   F7, then 5

   The Find dialog box displays as shown.

2. In the **Look for** list, select **Items**.

3. On the **Basic** tab, in the **Search for this text** box, type some text such as an item name, a supplier item number, or an item description.



What can I do with the search results?

You could do one of the following:

- **Edit:** You can select a customer, item, or transaction from the results list, and then click Edit to edit the selected customer or item.
- **View Receipt:** You can view the selected transaction's receipt.
- **Search results list:** Click a column heading to sort the results list by the information in that column. You cannot edit any information in this list.

4 In the **In these fields** box, select the fields you want to search, such as **All item fields**, **Supplier item numbers**, or **Description fields only**.

5 To narrow the search further, select **Only these departments**, **Only these categories**, or **Only these suppliers**, and then select one or more departments, categories, or suppliers.

Tip

Use the None or All buttons to speed your selection.

6 Choose **Find Now**.

Items matching the text that you searched for appear in the results list at the bottom of the window.

7 (If applicable) To stop the search, choose **Stop**.

8 (If applicable) To clear the search results and begin a new search, choose **New Search**.

9 To add one of the items in the results list to the current transaction, select the item, and then choose **Add to Order**.

Why do I either get too many results or none at all?

If you are getting too many results, narrow your choices further. If you are not getting any results, broaden the search to include more possibilities.

To find customers with a basic search

1. Press **Tools**, and then press **Find**.

   F7, then 5

2. In the **Look for** list, select **Customers**.

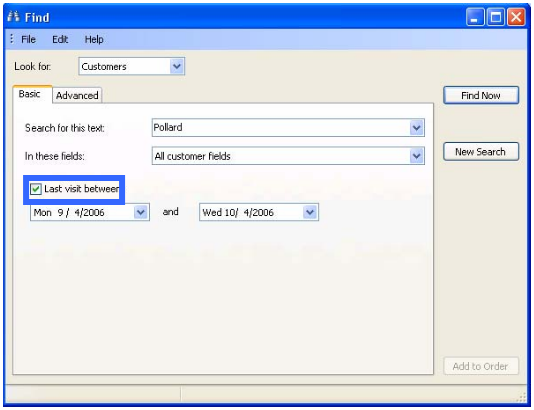
3. On the **Basic** tab, in the **Search for this text** box, type some text, such as **All customer fields**, **Company field only**, **Name fields only**, or **Company text field only**.

4. In the **In these fields** box, select the fields you want to search, such as **All customer fields**, **Company field only**, **Name fields only**, or **Company text field only**.

5. To narrow the search to a specific date range, select the **Last visit between** check box, and then select start and end dates.

   -or-

   To expand the search to all dates, clear the **Last visit between** check box.



What is the quickest way to start a new search if my results are returning too many choices, and I know I need to narrow the search further?

You can stop the search by choosing Stop. Then, you can clear the search to begin a new one by choosing New Search.

6 Choose **Find Now**.

Customers matching the text that you searched for appear in the results list at the bottom of the window.

7 (If applicable) To stop the search, choose **Stop**.

8 (If applicable) To clear the search results and begin a new search, choose **New Search**.

9 To add one of the customers in the results list to the current transaction, select the customer, and then choose **Add to Order**.

To find transactions with a basic search

1 Press **Tools**, and then press **Find**.

F7, then 5

2 In the **Look for** list, select **Transactions**.

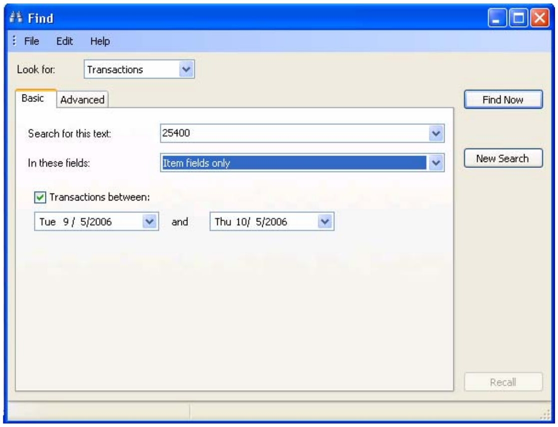
3 On the **Basic** tab, in the **Search for this text** box, type some text that you are looking for, such **Transaction detail fields only**, **Customer fields only**, or **Item fields only**.

4 In the **In these fields** box, select the fields you want to search, **Transaction detail fields only**, **Customer fields only**, or **Item fields only**.

5 To narrow the search to a specific date range, select **Transactions between**, and then select start and end dates from the drop-down calendars.

What is being searched when I enter search criteria?

Point of Sale searches the lists, records, and receipts in the store database for information that matches your criteria.



6. Choose **Find Now**.

   Transactions matching the text that you searched for appear in the results list at the bottom of the window.

7. (If applicable) To stop the search, choose **Stop**.

8. To recall one of the transactions in the results list, select the transaction, and then choose **Recall.**

9. (If applicable) To clear the search results and begin a new search, choose **New Search**.

Using advanced searches to find information

Things to know

What information can I find about items through searches?

Here is some of information you can find:

- **Price:** The regular price that your customers will pay for an item.
- **Cost:** The amount that your store pays for an item.
- **In stock:** The in-stock quantity of an item. Point of Sale updates the in-stock quantity through purchase orders and transactions.
- **Item quantity:** The item quantity can include decimal values for items that are sold by weight or in bulk quantities. For example, a store might sell items such as candy by the pound.
- **Bar code number**

To find items with an advanced search

1. Press **Tools**, and then press **Find**.

   F7, then 5

2. In the **Look for** list, select **Items.**

3. Under **Define more criteria**, select what you are looking for in the **Field** list, such as **Item No.**, **Department**, **Price**, **Last Sold**, or **Sale Price**.

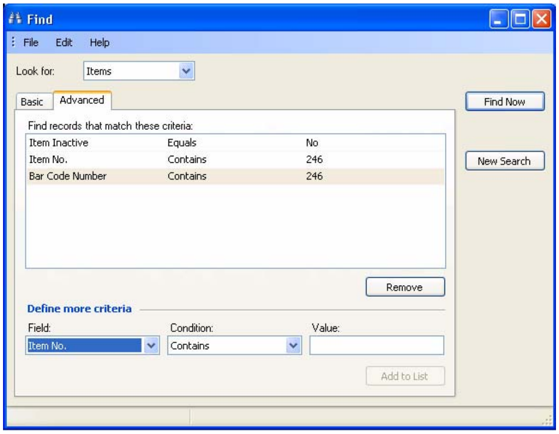
4. In the **Condition** list, select a required condition, such as that it contains, is exactly, or does not contain some specific value.

5. In the **Value** box, type the specific value you are looking for.

   For example, if you selected the Sale Price field, the condition *is exactly* and the value $29.99, Point of Sale will search for items that have a sales price equal to $29.99.

6. Choose **Add to List**.

- **Extended description:** Other descriptive information about this item, such as extras included with the item or that batteries are not included
- **Detail line 1, 2, and 3:** Additional item attribute information, such as size or color
- **Picture:** An image of the item
- **Profit margin:** The percentage of the Price that is left after the Cost is subtracted
- **Bin location:** The item's location
- **Notes:** Additional information about an item



7 Repeat Steps 2 to 5 for each criterion you want to create.

8 (If applicable) To remove a search criterion, select it in the **Find** items that match these criteria box, and then choose **Remove**.

9 Choose **Find Now**.

Items matching your appear in the results list at the bottom of the window.

10 (If applicable) To stop the search, choose **Stop**.

11 To add one of the items in the results list to the current transaction, select the item, and then choose **Add to Order**.

12 (If applicable) To clear the search results and begin a new search, choose **New Search**.

What do the options in the Find window under *Define more criteria* do?

You can do the following with these options:

- **Field:** Select what you are looking for from the list.
- **Condition:** Select a condition form the list, such as *contains, is exactly, is not*, and so on.
- **Value:** Type a specific value in this box
- **Add to List:** Add the criterion that you created to the list
- **Remove:** Remove the selected criterion from the list
- **Find Now:** Start the search.
- **Stop:** Stop the current search in progress.
- **New Search:** Clear the current search criteria so you can start a new search.

To find customers with an advanced search

1 Press **Tools**, and then press **Find**.

F7, then 5

2 In the **Look for** list, select **Customers.**

3 On the **Advanced** tab under **Define more criteria**, select what you are looking for in the **Field** list, such as **Customer Number**, **City**, **State**, **First Name**, or **Last Name**.

4 In the **Condition** list, select a required condition, such as that it contains, is exactly, or does not contain some specific value.

5 In the **Value** box, type the specific value that you are looking for.

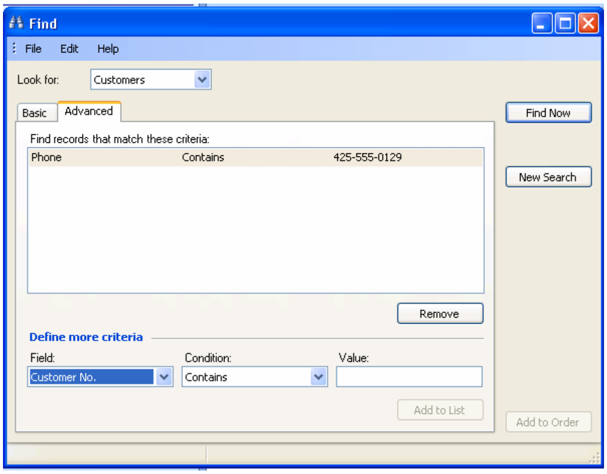
For example, if you selected the Total Sales field, the condition "is greater than," and the value is $500, then Point of Sale will search for customers who have made purchases totaling more than $500.

6 Choose **Add to List**.

What information can I find out about customers through searches?

Here is some of the information that you can find:

- **Customer number**
- **Title**
- **First name**
- **Last name**
- **Company**
- **E-mail**
- **Picture**
- **Phone numbers**
- **Address**
- **Price level:** Special pricing for some customers
- **Discount (%):** Discounts that some customers receive
- **Tax ID Number:** A customer's resale tax status number
- **Customer is employee:** Whether a customer is also an employee
- **Customer is tax exempt:** Whether a customer is exempt from sales tax
- **Notes:** Additional information about a customer



7 Repeat Steps 2 to 5 for each criterion you want to create.

8 (If applicable) To remove a search criterion, select it in the **Find items that match these** criteria box, and then choose **Remove**.

9 (If applicable) To expand the search to all dates, clear the **Last visit between** check box.

10 Choose **Find Now**.

Customers matching your criteria appear in the results list at the bottom of the window.

11 (If applicable) To stop the search, choose **Stop**.

12 To add one of the customers in the results list to the current transaction, select the customer, and then choose **Add to Order**.

13 (If applicable) To clear the search results and begin a new search, choose **New Search**.

Things to know

How is the advanced search different from the basic search?

Use an advanced search to narrow your search or to find more specific information. You can search in specific fields or search for a variety of dates or date ranges. You will need to define criteria for your search. Define as many criteria as you want for a single search. When you choose Find Now, Point of Sale searches for results that meet all of your criteria.

What information can I find about transactions through searches?

Depending on what has been set up in Manager View, you can find a transaction's line items, total, payment method, date and time, the transaction number, customer number, amount saved on the transaction, and other information.

To find transactions with an advanced search

1. Press **Tools**, and then press **Find**.

   F7, then 5

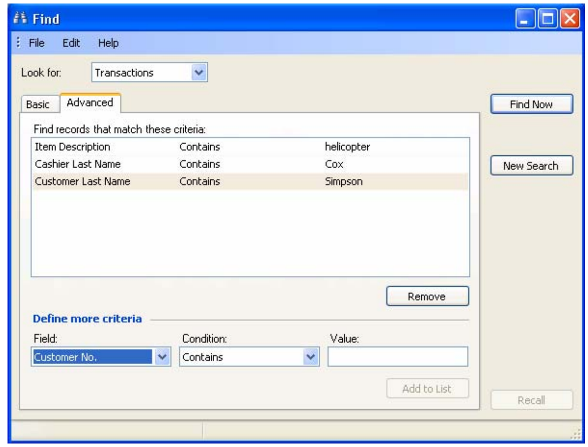
2. In the **Look for** list, select **Transactions.**
3. Under **Define more criteria**, select what you are looking for in the **Field** list, such as such as **Customer Number**, **Transaction Number**, **Date/Time**, or **Item Description**.
4. In the **Condition** list, select a required condition, such as that it contains, is exactly, or does not contain some specific value.
5. In the **Value** box, type the specific value that you are looking for.

   For example, if you selected the **Transaction Date** field, the condition is "in the last 7 days," and the date is 3/22/05, then Point of Sale will search for transactions that have been completed seven days earlier than 3/22/05.

6. Choose **Add to List**.

How can I get the best results from my advanced search?

Searching for a phrase will find records that contain any of the words in the phrase. For example, a search for "large red" will find records that contain "large" and records that contain "red". To search for records that contain both "large" and "red", enter "large and red" in the “Search for this text” box. Searching for "large red" gives the same results as searching for "large or red".



7 Repeat Steps 2 to 5 for each criterion you want to search for.

8 (If applicable) To remove a search criterion, select it in the **Find items that match these** criteria box, and then choose **Remove**.

9 (If applicable) To expand the search to all dates, clear the **Last visit between** check box.

10 Choose **Find Now**.

11 Transactions matching your criteria appear in the results list at the bottom of the window.

12 (If applicable) To stop the search, choose **Stop**.

13 To recall one of the transactions in the results list to the current transaction, select the transaction, and then choose **Recall**.

14 (If applicable) To clear the search results and begin a new search, choose **New Search**.

6

Working with Advanced Transactions

In this chapter

In this chapter, continued

Adding or removing transaction information

Things to know

Why can't I add a customer to a transaction?

.A customer must be in the customer list before you can add the customer to a transaction. Add the customer to the customer list and then you can add the customer to the transaction.

To add a customer to a transaction

1. In the transaction pane, choose **Select Customer**.
2. In the **Customers by Name** list, select the customer you want.

> **Tip**
>
> To quickly find a customer, type all or part of the customer's name in the search box. As you type, Point of Sale selects the closest match in the list.

3. Press ENTER or choose **Add**.

To remove (clear) a customer from a transaction

- Press **Customer**, and then press **Clear**.

  F3, then 8

What should I include in the transaction details?

Transaction details consist of a reference number and comments. Comments can include miscellaneous information about a transaction, such as delivery instructions.

Can I print transaction details on the receipt?

Depending on the receipt formats in use at your store (set up in Manager View), transaction details may be printed on the receipt.

To add details to a transaction

1 Press **Transaction**, and then press **Edit Transaction**.


F5, then 1

2 Press **Details.**


CTRL+1

3 In the **Reference number** box, type a reference number.

This can include numbers, letters, and symbols.

4 In the **Comments** box, type a comment, and then choose **OK**.

Creating or viewing an item comment

Can I include the item comments on the receipt?

Depending on the receipt formats in use at the store (set up in Manager View, item comments may appear on receipts.

To create or view an item comment

1. In the transaction pane, select an item.
2. Press **Transaction**, and then press **Edit Line Item**.

   F5, then 2

3. Press **Add Comment**.

   CTRL+5

4. Type the comment, and then press ENTER.

To view an item comment from a previous transaction

1. Find the receipt for the transaction.
2. If the receipt doesn't contain the item comment, you can view the comment by recalling the receipt:

   - Under **Receipt Options**, press **Recall for Return**, and then press **Return All Items**.

     CTRL+4, and then CTRL+2

     The transaction appears as a return in the transaction pane. You can view the item comment there, and then cancel the return transaction (if applicable) by pressing **Transaction**, and then **Cancel Transaction**.

Holding and recalling a transaction

Things to know

Why won't Point of Sale always let me put a transaction on hold?

You can hold a sales transaction *only* after you have added at least one item to it. Add an item, and then you will be able to place the transaction on hold. Once a transaction is on hold, you can recall it when you are ready.

Can I recall a previous transaction while I am making another transaction?

No, you cannot recall a transaction while another transaction is in progress.

To place a transaction on hold

1 Press **Transaction**, and then press **Hold**.

F5, then 4

Note

If you are not in the middle of a transaction, Point of Sale displays the Recall command in place of the Hold command on the menu. If you are in the middle of a transaction, it displays the Hold command.

2 In the **Comments** box, add a comment that helps you identify the transaction; for example, why the transaction is on hold, and then press ENTER.

To recall a transaction

1 Press **Transaction**, and then press **Recall**.

F5, then 4

2 In the **Transactions on Hold** list, select the transaction you want, and then choose **Recall.**

Cancelling and voiding a transaction

Things to know

Can I cancel a transaction in progress?

If you are assigned to the Owner, Manager, or Supervisor roles, you can cancel a transaction in progress after you have scanned or entered at least one item and before you have totaled the transaction.

How is cancelling a transaction different than voiding it?

All roles can void a previous transaction if it is on the originating register and in the current batch. If the transaction is from a closed batch, you must process it as a return.

To cancel a transaction

- Press **Transaction**, and then press **Cancel Transaction**.

  F5, then 5

To void a previous transaction

1 Find and view a receipt.

2 Choose **Select**, and then press **Recall for Void**.

CTRL+5

-or-

Press **Tasks**, and then press **Void**.

F6, then 6

2 In the **Receipts by Date/Time** list, select the receipt you want, choose the **Select** button, and then press ENTER.

The **Refund** pane displays the original payment method and payment amount.

3 Refund the correct amount to the customer, and then choose **OK** or press ENTER.

-or-

If the transaction was paid for with a debit card, swipe the debit card.

Point of Sale displays the **Post Transaction** dialog with the original payment amount.

Viewing a customer’s purchase history

Things to know

How far back in times does the purchase history go?

The History tab displays purchases made within the time period specified in Manager View, such as the last 30, 60, or 90 days.

What is the difference between the History tab and the Purchase History tab?

The History tab only shows the recent purchases. The Purchase History tab shows a complete history of purchases for the customer up to the time limit specified in Manager View.

Is it possible to initiate a return from the History tab?

Yes, if you choose the Return button or press ENTER, you will initiate a return for the selected item.

To view a purchase history if a customer has been added to a transaction

- In the transaction pane, choose **Purchase History**.

To view a purchase history if a customer has *not* been added to a transaction

1. In the search box, type the customer name or customer number, and then press ENTER.
2. Select the customer, choose **View/Edit** next to the customer's name, and then choose the **History** tab.
3. If you want to view all of the customer’s purchase history, choose **More**.
4. After you finish viewing the customer's purchase history, press ESC.

Caution

If you press ENTER or choose the Return button, POS begins a return for a selected item.

Substituting items in a transaction

Things to know

Why can't I find any substitutes for an item?

Two things must be in place before you can make a substitution:

- The original item must be out of stock.
- The substitute item must have been designated as a substitute for the out-of-stock item in Manager View.

To add a substitute to a transaction

1. Select the line item that is out of stock.
2. Press **Transaction**, and then press **Edit Line Item**.

   
   F5, then 2

3. Press **Select Substitute**.

   
   CTRL+8

   Point of Sale displays a list of substitute items.

4. Select the substitute item you want, and then choose **Replace**.

   Point of Sale removes the out-of-stock item and adds the substitute item to the transaction.

Checking a price during a transaction

Things to know

If I type in a description that is only partly correct, will the search still be able to find the item?

If you misspell the word that you type in, the search will not return results with the item you are searching for. However, if you have one incorrect word, it will still find anything that matches. For example, if you type in “red helmet” and there is no red helmet in inventory, the search could turn up “red ball” or “blue helmet,” which are in inventory.

Check a price by item number

1 Scan the item, or type the item number in the search box and then press ENTER.

The item will be added to the transaction, where you can view the item's current price.

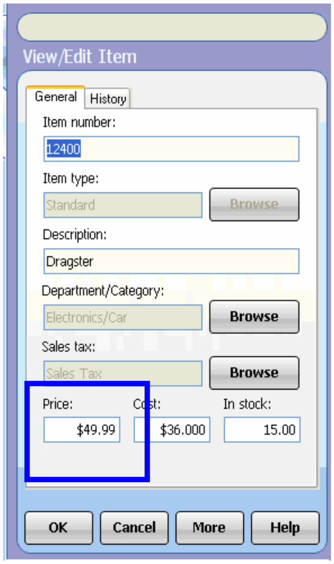
2 (If applicable) To remove the item from the transaction, choose **Remove** on the line item.

Check a price by description

1 Type the item's description in the search box, and then press ENTER.

2 Select the item in the **Search Results** list.

3 Choose **View/Edit** to view the item and see its price.



Applying or removing taxes

Things to know

Who can apply or remove taxes on items and transactions?

You can apply or remove individual taxes from a single item or an entire transaction if you are assigned to an Owner, Manager, or Supervisor role.

How do I know if an item or transaction is taxable?

A check mark in the Tax column of the Transaction pane indicates that an item is taxable and not affected by tax changes applied to the entire transaction.

For each tax in the Taxes list, Point of Sale displays a check mark in the Applied column if the tax is applied to the transaction.

To apply or remove (clear) a tax from a line item

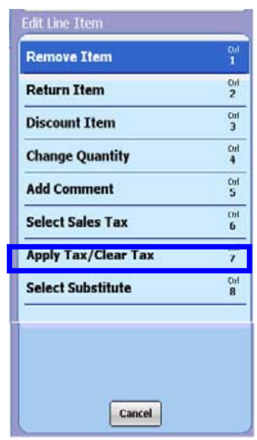
1 Select the line item.

2 Press **Transaction**, and then press **Edit Line Item**.

F5, then 2

3 Press **Apply Tax/Clear Tax**.

CTRL+7



One of the following will occur:

- If the line item has a tax already applied, Point of Sale clears the tax from the line item.
- If the line item does not currently have a tax applied but previously had a tax, Point of Sale applies the previous tax.
- If the line item never had a tax applied, Point of Sale displays a list of taxes to choose from.

How do I handle situations in which there are multiple sales taxes defined?

If you have multiple sales taxes defined, you can choose which one to apply or remove on a line item.

Should I make tax exceptions for customers who are not residents of the state or who are buying for resale?

Customers who are not residents of your state or who are buying for resale may not have to pay sales tax on some items. Check to see if your state requires retailers to record proof of tax-exempt status with each tax-exempt transaction; for example, a tax-exempt ID number or an out-of-state ID. A customer's tax ID number can be added to the transaction as a detail or comment, or it can be entered in the customer's record. After a customer's tax-exempt status has been entered in the customer's record, no tax will be applied when that customer is added to a transaction.

To apply or remove (clear) a specific tax from a line item

1. Select the line item.
2. Press **Transaction**, and then press **Edit Line Item**.

   F5, then 2

3. Press **Select Sales Tax**.

   CTRL+6

4. Press CTRL plus the number next to the tax you want to apply.

   -or-

   Press **No Tax** to remove any tax from the selected line item.

   CTRL+1

> **Note**
>
> Point of Sale displays a check mark in the line item if the item is taxable.

How can a cashier tell if a tax has been applied to a transaction?

For each tax in the Taxes list, Point of Sale displays a check mark in the Applied column if the tax is applied to the transaction. Check marks in the Taxable column of the Transaction pane refer to whether a line item is taxable or not, and they are not affected by tax changes applied to the entire transaction.

To apply or clear taxes from a transaction

You can apply or clear individual taxes on an entire transaction.

Customers who are not residents of your state or who are buying for resale may not have to pay sales tax. If a customer's tax-exempt status has been entered in the customer's record, no tax will be applied when that customer is added to a transaction.

1. Press **Transaction**, and then press **Edit Transaction**.

   F5, then 1

2. Press **Taxes**.

   CTRL+3

3. In the **Taxes** list, select the tax you want to apply or clear, and then choose **Apply/Clear**.
4. When you are done applying or clearing taxes, choose **OK**.

Discounting line items

Things to know

Who can apply a discount to a line item?

Those with Owner, Manager, or Supervisor role can apply discounts to line items. If your role is Cashier, you cannot. All roles can apply preset discounts.

What are the discounts and how do the discounts vary from one another?

These five discounts can be applied to a line item:

- **Percent Off Regular Price**—Sets the price to a percentage off of the regular price of the item.
- **Percent Off Current Price**—Reduces the current price by the percentage you specify.
- **Amount Off Current Price**—Reduces the current price by the dollar amount you specify.
- **Markup from Cost**—Sets the price to a percentage above the item's cost (the price paid to the supplier).

To apply a discount to a line item

1. In the current transaction, select the line item you want to discount.
2. Press **Transaction**, then press **Edit Line Item**, and then press **Discount Item**.

    F5, then 2,  CTRL+3

   -or-

   Choose **Discount** on the line item.
3. Press one of the following:
   - **Percent Off Regular Price** (CTRL+1)
   - **Percent Off Current Price** (CTRL+2)

   > **Note**
   >
   > The *current price* differs from the *regular price* in that it might already have been discounted or changed.

   - **Amount Off Current Price** (CTRL+3)
   - **Markup from Cost** (CTRL+4)
   - **Set Profit Margin** (CTRL+5)

- **Set Profit Margin**—Sets the price to an amount that reflects the percentage of profit margin you specify, based on the item's cost (the price paid to the supplier).

Is it possible that a discount could have the effect of increasing the item's price in some instances?

Yes, depending on prices levels that may have been set previously for a customer.

4 Type a percentage or an amount, and then press ENTER.

Note

Type a percentage as a whole number plus a decimal fraction (such as 8.25 not .0825 for 8 ¼%).

Handling exchanges and returns

Things to know

If a customer wants to return an item without a receipt, but the customer knows the date of the transaction, how do I process the return?

You can verify the original purchase by looking up the receipt by its date. Press Return, press By Receipt, and then press Receipts by Date and Time.

To process a return or an exchange with a receipt and a scanner

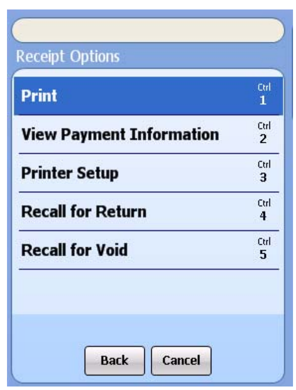
1 Scan the bar code on the receipt.

Point of Sale displays the receipt and Receipt Options.

> **Note**
>
> If the bar code is missing or unreadable, you can look up the receipt. See Chapter 6, "Finding What You Want" for instructions.

2 Press **Recall for Return** to recall the transaction for the return or exchange.

CTRL+4

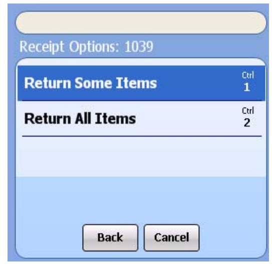


3 Press **Return Some Items** or press **Return All Items.**

CTRL+1 or CTRL+2

If I know which register handled a transaction, can I use the batch number to help find a receipt for a return?

Yes, you can find receipts by batch number for a register. It would also help to have an approximate date.



4 If you are returning only some items, select the items to return, choose **Add,** and then choose **Close** when finished adding items.

5 If you are making an exchange, scan or enter the new items.

6 Press **Total** and complete the transaction.

 F12

To process a return or an exchange by looking up a receipt

1 Press **Return**, and then press **By Receipt**.

 F8, then 1

2 Press **Today's Receipts**, **Receipts By Date/Time**, or **Receipts By Batch**.

 CTRL+1 (Today's Receipts)

CTRL+2 (Receipts By Date/Time)

CTRL+3 (Receipts By Batch)

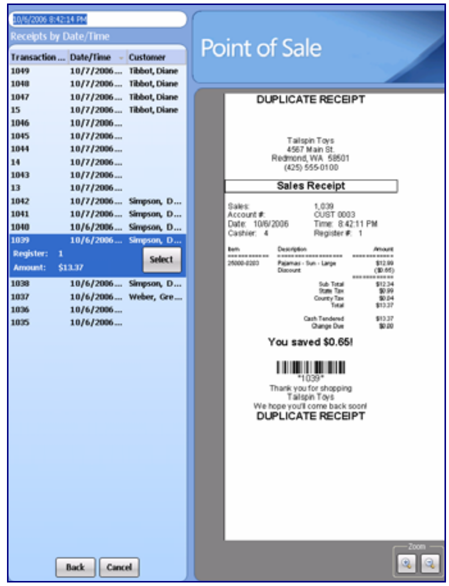
If our store keeps track of customer's purchases, can I look up a transaction for a return or exchange using that information?

Yes, process the return or exchange by customer name or number. Press Return, press By Customer, and then select the customer. Look on the History tab to find all of the customer's purchases.

When do I need to use Return Mode?

You only need to use Return Mode if a customer wants to return items for which there is no verification of purchase. Your store policies may not allow such returns, however.

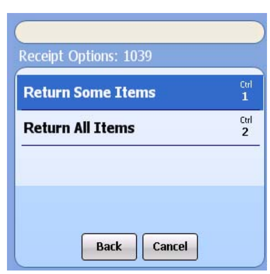
3 Locate and select the receipt, and then press ENTER or choose **Select**.



4 Press **Return Some Items** or **Return All Items**.

CTRL+1 (Return Some Items)

CTRL +2 (Return All Items)



Can I add items to a transaction and then accept a return at the same time?

Yes, you can enter the return first or after the other items are added to the transaction.

How does handling returns paid with a credit or debit card differ from a cash transaction?

You can scan the credit or debit card to help find a receipt. You must also refund the amount by placing the refunded amount on the debit or credit card.

How does handling returns paid with a check differ from a cash transaction?

A check would be treated like cash unless the store's policy requires that the check has cleared the bank before cash can be refunded. Check with your manager about store policy for these situations.

5 If you are returning only some items, select the items to return, choose **Add,** and then choose **Close** when finished adding items.

6 If you are making an exchange, scan or enter the new items.

7 Press **Total** and complete the transaction

F12

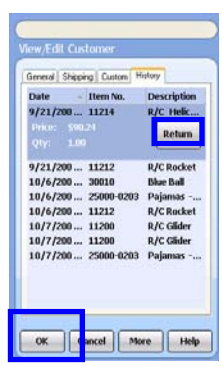
To process a return or an exchange by looking up a customer's purchase history

1 Press **Return**, and then press **By Customer**.

F8, then 2

2 In the **Customers by Customer No.** list, select the customer, and then chose **View/Edit**.

3 On the **History** tab, select an item to return, choose **Return**, and when you've finished adding returned items to the transaction, choose **OK** or press ENTER.



What is the best option to select for a return if the store does not track purchases by customer and there is no receipt?

In this situation, look up the receipt. Press Tasks, and then Find Receipts. Once you have the receipt, you can add it to the transaction.

4 If you are making an exchange, scan or enter the new items.

5 Press **Total** and complete the transaction.

F12

To process a return or an exchange without purchase verification

1 Press **Return**, and then press **Enter Return Mode**.

F8, then 3

2 Scan each returned item, or type its item number in the search box and then press ENTER.

A negative quantity will show for each item in the transaction pane.

3 If you are making an exchange, exit return mode by pressing **Return** and then **Exit Return Mode**, and then scan or enter the new item.

F8, then 3

4 Press **Total** and complete the transaction.

F12

Issuing gift cards

Things to know

Do I have to use a button in the task pane if I want to issue gift cards?

Yes, this is the method that Point of Sale uses. For information about setting up an Issue Gift Card button, see "About gift cards" in Manager View Help.

Why don't I see an Issue Gift Card button on the task pad?

It may be called something else, or it may not be set up for your store yet. Check with your manager.

To issue or add to a gift card

1 Choose the **Issue Gift Card** button on the task pad.

> **Note**
>
> The button is customizable and might be called something else. Check with your manager if you are not sure which button to use.

2 Type the gift card number or swipe the gift card.

3 Type the amount that should be added to the gift card.

4 Press **Total** to complete the transaction.

F12

To issue a gift card instead of a refund

1 Process the return as usual.

2 On the task pad, choose **Issue Gift Card**.

3 Type the gift card number or swipe the gift card.

4 Type the amount of the refund, and then press ENTER.

5 Press **Total (F12)** to complete the transaction.

F12

The transaction balance will be zero.

7

Handling Inventory

In this chapter

Adding inventory at the register

Receiving inventory

Viewing and changing inventory information

Changing the cost an item

Adding inventory at the register

Things to know

When is it possible to add an item to inventory at the register in POS View?

There are two situations in which you can add inventory at the register:

- You can add a new item to inventory at the register. For example, if a customer wants to buy an item that has not yet been added to the store's inventory, you can quickly type a description and item number for the item, and then add it to inventory and the transaction.
- You can receive inventory that has been delivered to the store. For example, when you receive a shipment from a supplier, you can receive it against an existing purchase order in POS View rather than using Manager View. See "Receiving inventory."

To add an item to inventory

1 Press **Items**, and then **New**.

F2, then 1

2 On the **General** tab, specify an item number, description, price, cost, and quantity in stock.

> **Note**
>
> An item number and description are required. Item numbers require at least 3 characters to scan correctly.

3 If the item will be a serial-numbered or noninventory item, choose **Browse** next to **Item type**, and then press **Serial numbered** or **Non-Inventory.**

CTRL+2 for serial-numbered item

-or-

CTRL+3 for noninventory item

4 Next to **Department/Category**, choose **Browse**, and then do one of the following:

- Select an existing department, and then select a category, create a new category, or select **Not Assigned**.

Can I change the cost or item type if I make a mistake?

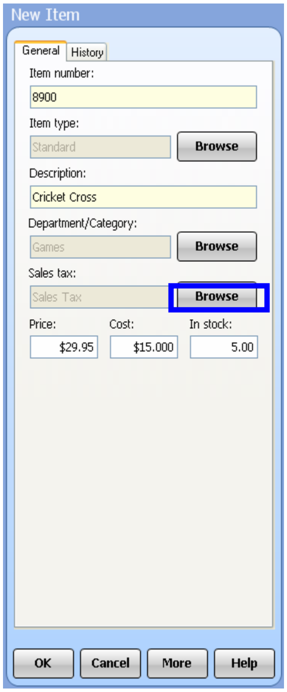
You can specify the cost and item type only when creating an item. They cannot be changed later.

When creating a new item, do I need to specify everything in the New Item window?

An item number and a description are required. It is best to fill as much as possible, however.

- Select **New Department** and type a name and code.
- Select **Not Assigned** if you do not want to assign the new item to a department.

5 Next to **Sales tax**, choose **Browse**, and then select the sales tax appropriate to the item.



6 To specify other information about the item, choose **More**.

7 When you have finished specifying information about the item, press ENTER.

Point of Sale adds the new item to inventory and asks if you want to add it to the current transaction.

Receiving inventory

Things to know

What is the item receipt in Point of Sale?

An *item receipt* is a document, often based on a purchase order, which is used to record quantities of items received and update the store database. You can receive inventory in POS View either using a new item receipt or one that was created previously.

To receive inventory

1. Press **Items**, and then press **Receive Inventory**.

   F2, then 7

2. Select an existing item receipt and choose **View/Edit**, or choose **New** to create a new item receipt.

   Point of Sale switches to Receive Inventory mode.

3. If a purchase order number is not yet shown, choose **Browse** next to the **PO No.** box, and then on the left, select the purchase order for the shipment that you are receiving.

   If no purchase order is associated with this shipment, you can skip this step.

   To select a purchase order, press the arrow keys or type a PO number, supplier name, or date in the search box. The supplier on the purchase order will automatically be filled in.

4. To sort the purchase order list by PO number, supplier name, or date, select a column heading.

5. If a supplier is not yet shown, choose **Browse** next to the **Supplier** box, and then on the left, select the supplier that sent the shipment that you are receiving.

My list of suppliers is long. Is there a way that I can quickly find the supplier that I want?

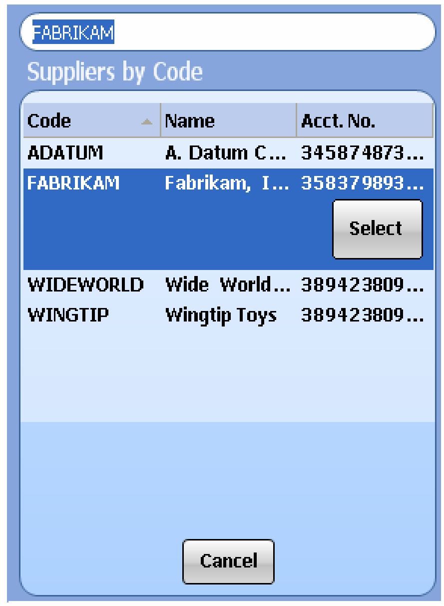
There are several ways of locating the supplier that you want, but typing in the name, supplier code, or account number in the search box and pressing ENTER is usually the quickest.

You can also sort the columns by clicking the column headings:

- Code
- Name
- Acct. No.

To select a supplier, press the arrow keys or type a code, name, or account number in the search box.

To sort the supplier list by code, name, or account number, select a column heading.



6 Enter the items you've received in the shipment.

Scan the items or add them to the item receipt manually:

- To select items from the item list, press **Items**, and then press **By Item Number** or **By Description**.

   F2, then 4 (item number), or F2, then 5 (description)

- Select an item, and then press ENTER to add it to the item receipt.

When will the received quantities be reflected in inventory?

Point of Sale updates quantities in inventory when you choose Update Inventory.

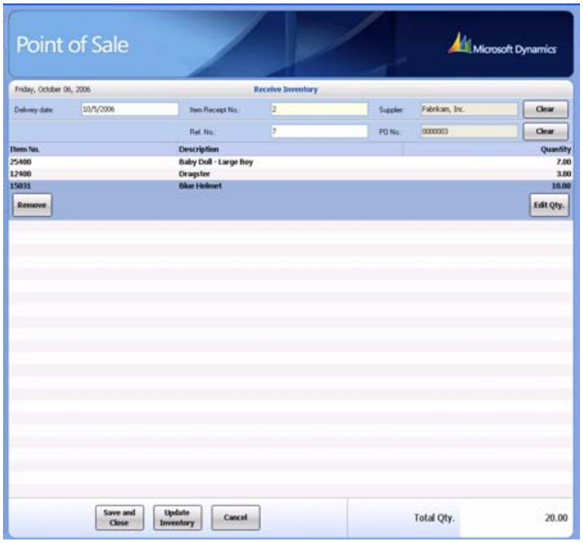
What advantage is there to receiving inventory at the register in POS View?

Receiving inventory in POS View can be especially useful in a one-computer store, which doesn't have a back-office computer dedicated to managerial tasks.

7 For each item you add, choose **Edit Qty.**, and in the **Quantity** box, type the quantity you received.

If the item is a serial-numbered item, enter a serial number or numbers for each received unit.

- Choose **New**.
- Type the serial number or numbers, and then press ENTER.



Repeat for each received unit.

The quantity in the item receipt will increase by 1 for each serial number (or set of serial numbers) that you create.

When would I use an existing item receipt rather than creating a new one?

You would select an existing item receipt if you had already received a partial shipment from a supplier. Otherwise, create a new one.

8. When you finish adding the items you received, do one of the following:
   - To save the item receipt without updating your inventory, choose **Save and Close**.
   - To save the item receipt, update your inventory, and mark the item receipt as closed, choose **Update Inventory**.
9. If Point of Sale displays a message that some serial numbers are needed, choose **Edit Qty.** next to each serial-numbered item in the item receipt to add the serial numbers for that item.

Viewing or changing inventory information

What can I view or edit on the Inventory tab?

The following inventory information is available to view or edit (depending on your security role):

- Number of items in stock
- Number of items on order
- Number of items being transferred
- Reorder point
- Restock level
- Date created in inventory
- Last updated
- Date last received
- Date last ordered
- Date last sold
- Cost
- All suppliers for the item
- The primary supplier
- Suppliers' item numbers
- Minimum order required
- Suppliers' prices
- The tax rate

To view or change inventory information

1 In the search box, type all or part of an item number or an item's description, and then press ENTER.

-or-

Press **Items**, and then press **By Item Number** or press **By Description**.


F2, then 4 (item number)

-or-


F2, then 5 (description)

2 In the list, select an item, and then choose **View/Edit**.

> **Note**
>
> You can also view item information for a line item in a transaction. Select the item, and then choose View.

3 Choose the **General** tab and edit, modify, or view its information as needed, including:

- The item number
- The description
- Department and category (Change by choosing **Browse**.)

Why don't I see a Serial Numbers tab for the item I wanted to view?

Most items don't have serial numbers. You will only see the Serial Numbers tab if the item was created as a serial-numbered item.

- Sales tax (Change by choosing **Browse.)**
- Price, cost or quantity in stock (depending on your role permissions)

> **Note**
>
> The item type is specified when the item is created and cannot be changed.

4 Choose the **History** tab to see historical information about the item, such as the date the item was last ordered.

5 Choose the **Serial Numbers** tab for items that have a serial number to see the serial numbers assigned to the item and whether they have been sold or are in stock.

For each serial number that has been sold, the tab lists the customer number of the customer who purchased it (when available).

6 Choose the **More** button to see the **Item** window, which shows all of the information available for a given item.

For more information on the options in the **Item** window, press **F1 (Help)** from the window.

Changing the cost of an item

What does the cost of an item have to do with its price?

Cost is added into the price of an item. The cost of an item is the amount the store pays for it.

When does the cost of an item need to be changed?

You need to update the Cost box on the General tab when what your supplier charges your store for the item changes However, only employees assigned to the Owner, Manager, or Supervisor roles can change the cost of an item.

To change the cost of an item

1 Press **Items**, press **By Description**.

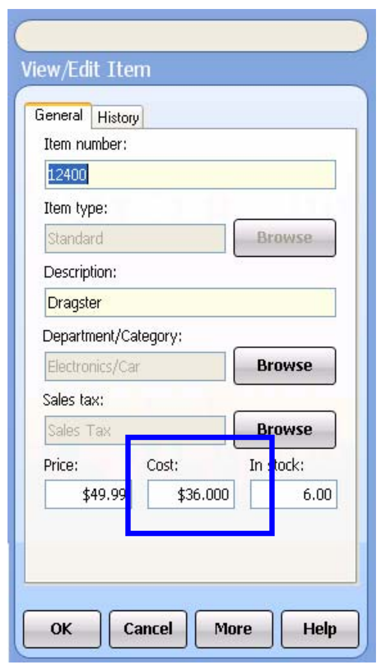
F2, then 5

2 Select the item whose cost you want to change, and then choose **View/Edit**.

-or-

In the transaction pane, select the line item whose cost you want to change, and then choose **View**.

3 On the **General** tab, in the **Cost** box, type the new cost of the item, and then press ENTER.



8

Handling Customer Information

In this chapter

Adding a customer to the customer list

Viewing and editing customer information

Viewing a customer's purchase history

Handling shipping addresses
- Create a new or additional shipping address
- View or edit a customer's addresses
- Delete a shipping address

Adding a customer to the customer list

Things to know

What is a *customer number*?

Each customer who is added to the customer list must have a unique customer number. Normally, this would already be set up in Manager View to automatically generate numbers. You can, however, change the number in POS View.

Can I create a new customer record even if I don't have all of the information about the customer?

A customer number, first name, and last name are required.

Are customers in the customer list automatically added to transactions?

A customer is not automatically added to a transaction just because you add it to the customer list. You must choose Add Customer.

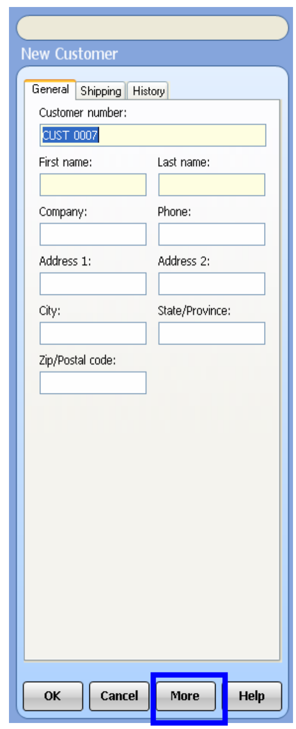
To add a customer to the customer list

1 Press **Customer**, and then press **New**.

F3, then 1

2 On the **General** tab, type the information you want about the customer, and then press ENTER.

If you want to add detailed customer information, choose **More**.



Viewing and editing customer information

Things to know

What is the *customer list*?

The *customer list* contains your customer records. If you are sending advertising or mailing purchases, this list must be accurate and up-to-date. You can view, edit, inactivate, and delete customers from the list.

Where can I view or change information about my customers?

View information in the Customer window on these tabs:

- The **General** tab displays the customer's number along with the customer's name and contact information.
- The **Shipping** tab displays any addresses that have been created for the customer.
- The **History** tab shows all of a customer's past transactions. You cannot edit the History tab information, but you can view the receipt and add it to a returned item.

To view or edit a customer's information

1 In the search box, type all or part of a customer's name, customer number, or phone number, and then press ENTER.

-or-

Press **Customer**, and then press **By Customer No.**, **By Name**, or **By Phone Number**.

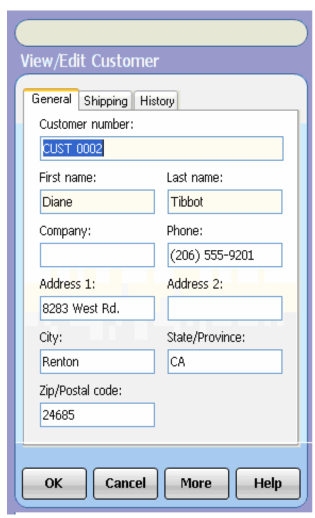
F3, then 4, (customer number)

F3, then 5, (name)

F3, then 6 (phone number)

2 In the list, select the customer, and then choose **View/Edit**.

Point of Sale displays the **View/Edit Customer** window.

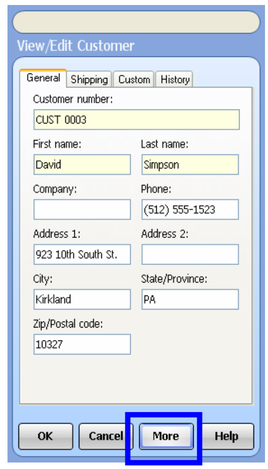


Can I print shipping labels for a customer using the Print Labels button on the toolbar of the Customer window?

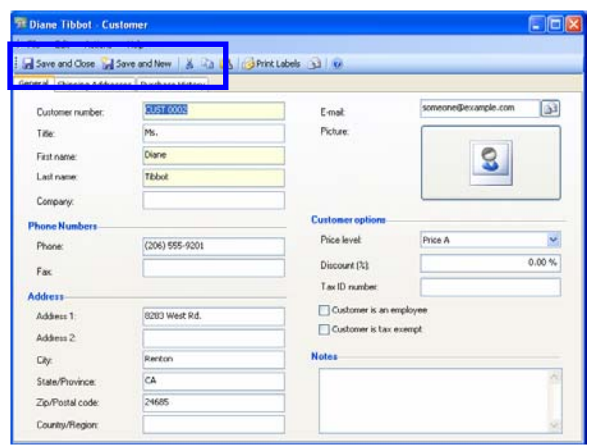
It depends on what address is used as the customer's main address on the General tab of the Customer window. Only the address on the General tab can be printed using the Print Labels command (available on the Tools menu). For this reason, the types of mailings and shipments that you send to your customers will dictate which address you enter as the customer's main address. For example, if you regularly send flyers or other mailings to your customers, you will want to enter the customer's standard mailing address as the main address. But, if you will only print labels for package shipments, then you might want to enter the customer's primary shipping address as their main address. This distinction will be especially important for customers with post office boxes.

3 View or make any needed changes on the **General** or **Shipping** tabs or view the customer’s purchase history on the **History** tab, and then click **OK** when finished.

4 To view or change other customer information, choose **More** at the bottom of a tab.



5 When finished with your changes, click **Save and Close** in the **Customer** window.



Viewing a customer's purchase history

Things to know

Where do I find information about a customer's purchase history?

The History tab displays customer purchases made within the time period specified in Manager View, such as the last 30, 60, or 90 days.

Is it possible to view a customer's purchase history beyond the time period shown for the History tab?

Yes, the complete purchase history of the customer can be found by choosing More at the bottom of the History tab.

To find an item purchased by a customer

- If the customer has already been added to the transaction, choose the **Purchase History** button to display the customer's information.

  -or-

1. In the search box, type the customer name or customer number, and then press ENTER.
2. Select the customer, choose the **View/Edit** button next to the customer's name, and then choose the **History** tab.

Is there s summary of information about a customer's purchases?

On the Purchase History tab, choose More to view the following:

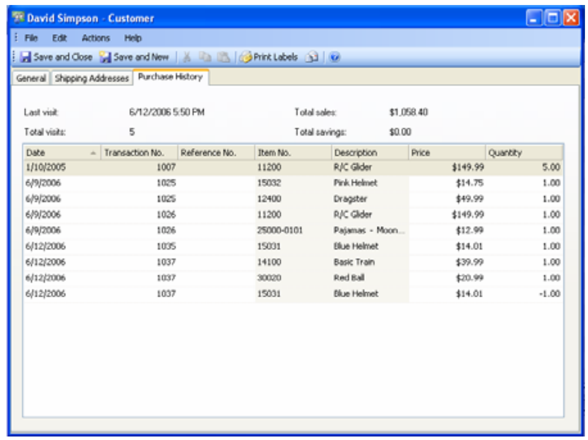
- **Last visit:** Date and time of the customer's last transaction
- **Total sales:** Total amount of sales for the customer
- **Total visits:** Number of transactions for the customer
- **Savings:** Total amount of savings for the customer resulting from discounts

Can I access the purchase history for a customer directly from the POS View screen?

A customer's purchase history is available at the register by choosing Purchase History in the transaction pane when a customer has been added to a transaction.

3 (If applicable) If you want to add the transaction as a return, choose **Return** and then choose **OK** or press ENTER unless you want to view further information.

4 (If applicable) To view the complete customer history, choose **More.**



5 (If applicable) On the **Purchase History** tab, to view the receipt for a transaction, double-click the transaction in the list.

6 After you finish viewing the customer's purchase history, press ESC.

Handling shipping addresses

As a cashier, can I see the customer’s shipping address from the POS View screen?

A customer's primary shipping address, if available, is displayed at the register when the customer is added to a transaction by choosing Select Customer. Choose Add after the customer’s name in the task pane. You can then select a different shipping address or add a new one by choosing Shipping Address.

To create a new or additional shipping address

1. In the transaction pane, choose **Select Customer** to add a customer to the transaction.
2. In the task pane, choose **Add** after the customer’s name.
3. In the transaction pane, choose **Shipping Address**.
4. If the customer has one or more existing shipping addresses, select an address on the **Shipping** tab, and then choose **New**.
5. Under **New Shipping Address**, type the shipping address.
6. If this is the primary address for the customer, choose **Set Primary**.

> **Note**
>
> If this is the customer's only shipping address or if this is already the primary shipping address, Set Primary is not available.

To view or edit a customer’s addresses

1. In the transaction pane, choose **Select Customer** to add a customer to the transaction.
2. In the transaction pane, choose **Shipping Address**.

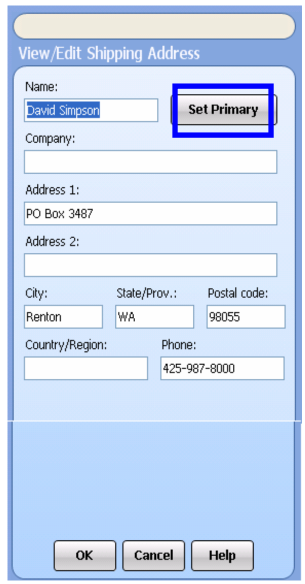
Do I have to designate a primary shipping address?

You must designate a primary shipping address if there is more than one address. If there is only one address for the customer, it automatically becomes the primary address.

3 On the **Shipping** tab, select the address you want to edit, and then choose **View/Edit**.

4 Edit the address as required.

5 If this is the primary address for the customer, choose **Set Primary.**



> **Note**
>
> If this is the customer's only shipping address or if this is already the primary shipping address, Set Primary is not available.

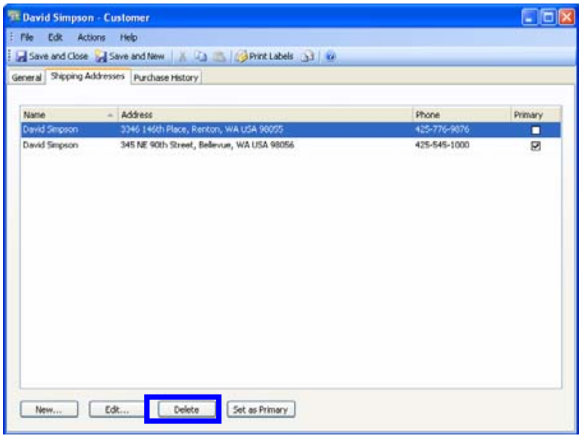
6 When finished with your changes in the **Edit Shipping Address** window, choose **OK** or press ENTER.

If a customer is no longer a customer, what is the best way to handle the record?

You may want to inactivate rather than delete a customer, so that the customer history is preserved. If you delete a customer, you will also delete the history of that account, which may be needed later on. Changes that involve deleting or inactivating a customer are made in Manager View.

To delete a shipping address

1. In the transaction pane, choose **Select Customer** to add a customer to the transaction.
2. In the transaction pane, choose **Shipping Address**.
3. In the task pane, choose **More**.
4. On the **Shipping** tab, select the address you want to delete, and then press DELETE.



9

Customizing the POS View Screen

In this chapter

Changing display settings

Things to know

Can I personalize screen settings in POS View?

Although many of the screen settings and other options are set in Manager View, some can be customized in POS View. For example, you can increase the size of the text and numbers in the Totals area, hide the customer address bar, or increase the font size. See procedures on the right to learn how to customize the POS View.

Note

Some POS View display options are set in Manager View. For more information, see "Customize your registers" in Manager View Help.

To change display settings

1 Press **Tools,** and then **System**.

F7, then 7

2 Press **Display.**

CTRL+4

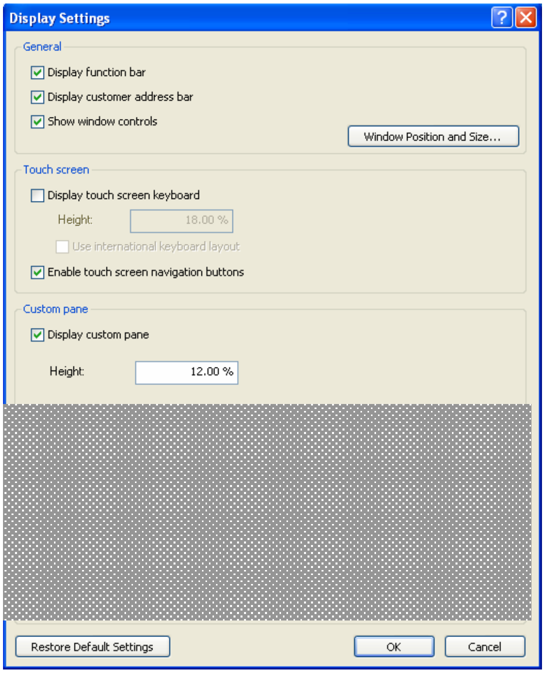
5 Under **General**:

Select or clear this check box:	To show or hide this feature:
Display function bar	The row of function buttons at the bottom of the window.
Display customer address bar	The customer address portion of the transaction pane
Show window controls	The Windows Minimize, Maximize/Restore, and Close buttons

What changes can I make in the Display Settings window?

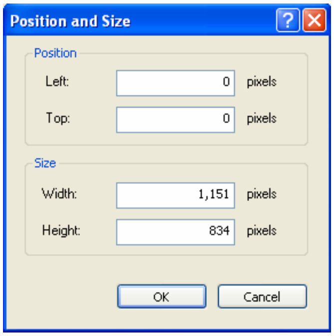
You can make some general changes including the following:

- Position and size windows
- Choose which function buttons to display
- Show or hide the customer address bar
- Show or hide Windows controls for easy access to the desktop
- Show or hide the touch screen keyboard
- Show or hide the touch screen navigation arrows
- Show or hide the custom pane and change its size
- Return settings to their original (default) settings.



4 Under **General**, choose the **Window Position and Size** button.

5 In the **Position and Size** dialog box, type the position for **Left** and **Top** in pixels.



6 Type the **Width** and **Height** in pixels, and then choose **OK**.

In what way are the touch-screen navigation keys helpful?

When enabled, these navigation buttons provide a way to move up and down lists in the task pane and the list of line items in the transaction pane.

How can I restore my settings to what they were originally in the Display Settings dialog box?

At the bottom of the dialog box, choose Restore Default Settings.

7 Under **Touch screen**:

Select or clear this check box:	To show or hide this feature:
Display touch screen keyboard	A keyboard for touch screen users displayed at the bottom of the POS View window. If you choose to display the touch screen keyboard, you can specify its height as a percentage of the POS View window.
Enable touch screen navigation buttons	Buttons for moving up and down lists in the task pane, and in the list of line items in the transaction pane.

Note

The "Use international keyboard layout" option is not available in this release of Point of Sale.

8 Under **Custom Pane:**

Select or clear this check box:	To display or hide this feature:
Display custom pane	The custom pane at the top of the transaction pane. In the **Height** box, specify the height of this pane as a percentage of the POS View window.

Creating a custom pane

Things to know

Are there files that I can use as a template for customizing the custom pane?

The custom pane displays an HTML file that can be customized for your store. You can use the supplied HTML file as a template for creating your own file. The supplied file is located on your hard drive. (C:\Program Files\Microsoft Dynamics - Point of Sale\Content\HtmlStatusPane\StatusBar.html)

To create a custom pane using an HTML file

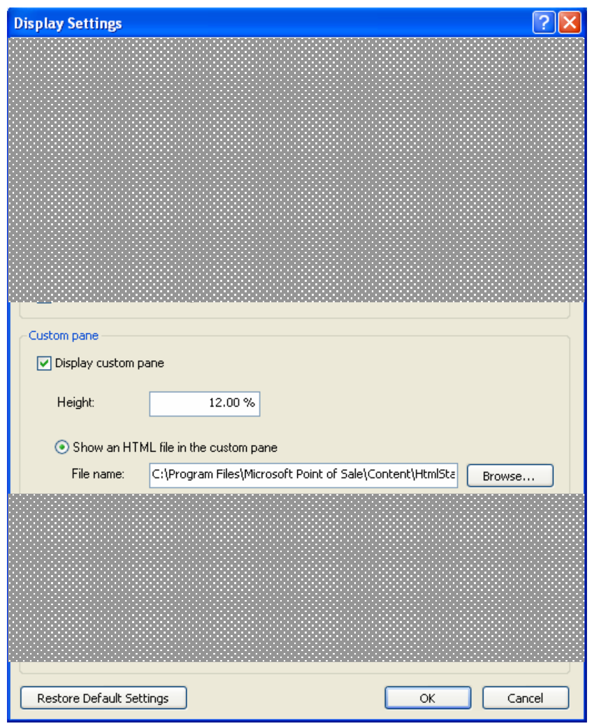
1 Press **Tools**, and then **System**.

F7, then 7

2 Press **Display.**

CTRL+4

3 Select the **Display custom pane** check box, and then in the **Height** box, indicate the height as a percentage of the POS View window.



Can I create a custom color for my background?

Yes, select "Use a solid color," and then from the drop-down list, select Custom.

4 If you want to show an HTML file in the custom pane, select **Show an HTML file in the custom pane**, and then choose **Browse** and then select either the HTML file that is supplied with Point of Sale (C:\Program Files\Microsoft Dynamics - Point of Sale\Content\HtmlStatusPane\StatusBar.html) or an HTML file that has been customized for your store.

Point of Sale displays the selected file name in the File name box.

To create your own custom pane

1 Press **Tools,** and then **System**.

F7, then 7

2 Press **Display**

CTRL+4

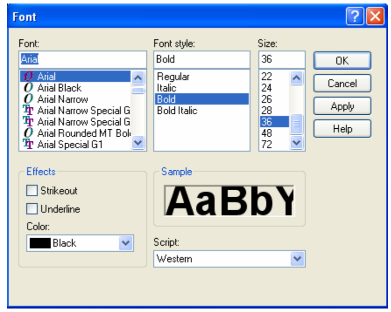
3 Under **Custom Pane**, select the **Display custom pane**, and then in the **Height** box indicate the height as a percentage of the POS View window.

4 Select **Create my own content for the custom pane**, and then in the **Text** box, type the text that you want to appear in the custom pane.

5 Choose the **Font** button A to select font options for the text.

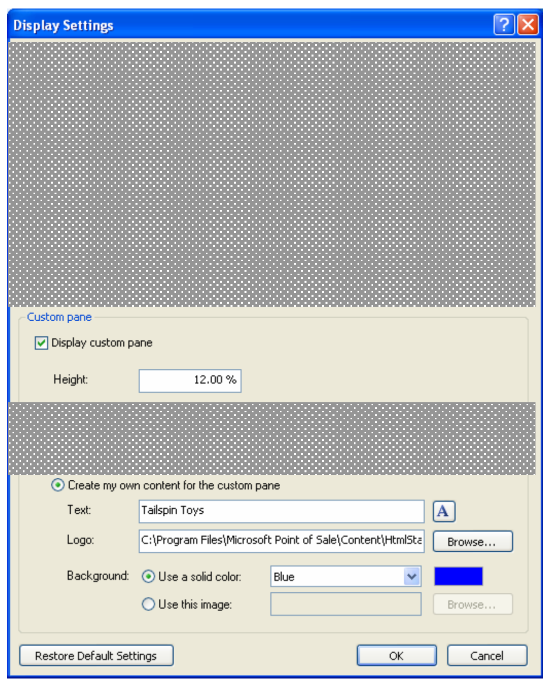
Can I use an image and a color for the background?

You must choose one or the other.



6 Choose the **Browse** button next to the **Logo** box to select a logo to show in the custom pane.

7 To set a background, choose **Use a solid color** and then select a color, or choose **Use this image** and choose **Browse** to select the background image.



8 When finished, choose **OK** or press ENTER.

Resizing the panes and touch-screen keyboard

Things to know

Can I move the task pane to the left or right side of the screen?

The task pane can be displayed on the right side or the left side of the POS View window, but this option is set in Manager View. If you are using a mouse, however, you can resize the transaction and task panes. The touch-screen keyboard and custom screen can be customized with a mouse, keyboard, or touch screen.

Can I hide the custom pane to make more room for the transaction pane?

If you need more room for the transaction pane, you can hide the custom pane. Choose Tools, System, and then Display.

To resize the transaction pane and the task pane (Mouse users only)

- Drag the border between the task pane and the transaction pane left or right.

> **Note**
>
> The task pane can be displayed on the right side or the left side of the POS View window. This option is set in Manager View.

To resize the touch-screen keyboard or custom pane (All users)

1. Press **Tools**, and then press **System**.

   F7, then 7,

2. Press **Display**.

   CTRL+4

3. Under **Touch screen**, select the **Display touch screen keyboard** check box, and then in the **Height** box, type a percentage of the total screen height.

> **Important**
>
> Type the percentage as a whole number plus a decimal fraction, such as 20.5, not as .205 to mean 20 ¼%.

Can I resize the Help window?

Yes, point to a border or corner of the window until the pointer appears as a double-headed arrow, and then drag the border until the window is the size you want.

4 In the **Custom pane area**, select the **Display custom pane** check box, and then in the **Height** box, type a percentage of the total screen height.

> **Note**
>
> Type this percentage as a whole number plus a decimal fraction (if there is one), such as 8.0, not .8 to mean 8%.

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Printing from POS View

In this chapter

Things to know

What can I print?

Printing could include printing the last receipt and any receipt by date or batch. You can also print a Help topic. If the store offers gift receipts to customers, they must be set up in Manager View before you can print them in POS View. Certain reports can also be printed from POS View.

To reprint the last receipt

- Press **Tasks**, and then press **Reprint Last Receipt**.


F6, then 4

To find and print any receipt

1 Press **Tasks**, and then press **Find Receipts.**


F6, then 3

2 Under **Find Receipts**:

Press	Then
Today's Receipts (CTRL+1)	Search for the receipt by the time of day or amount.
Receipts By Date/Time (CTRL+2)	Type a start date and an end date, and then press ENTER.
Receipts By Batch (CTRL+3)	Select a batch, and then press ENTER

3 Select the receipt you want, and then press ENTER.

What do I need to do to be able to print gift receipts for customers?

Printing gift receipts is the same as reprinting any last receipt. The reprinted receipt is the gift receipt. See instructions on the right, "To print a gift receipt."

4 Under **Receipt Options**, press **Print**.

CTRL+1

To print a gift receipt

- Press **Tasks**, and then press **Reprint Last Receipt**.

F6, then 4

Printing a Help topic

Why print a Help topic?

You do not need to print Help topics to use them, but some people find it easier to follow instructions from the printed page especially for complex procedures.

1 Display a Help topic.

2 On the **Help** window button bar, choose **Print** .

Printing POS View reports

Things to know

What is an X report?

An X report is a “snapshot” of a register’s activity since it was opened, and it is printed on the register’s receipt printer. An X report displays information such as sales, the sum of all discounts given, and a customer count so far in the current batch.

Does printing an X report close the current batch?

Printing an X report does *not* close the current batch, but printing a Z or a ZZ report does. The Z and ZZ reports also automatically open the next batch.

What is a Z report?

The Z report provides end-of-day statistics for a register, and it is printed on the register's receipt printer. The Z report displays information, such as batch number, sales, amount of cash dropped, sales tax, and the closing total

To print an X report

1 Press **Tasks,** and then press **Open/Close**.

F6, then 1

2 Press **X Report.**

CTRL+3

Note

Only employees assigned to the Owner, Manager, or Supervisor roles can print X reports.

To print a Z report

1 Press **Tasks**, and then press **Open/Close**.

F6, then 1

2 Press **Z Report**.

CTRL+4

What is a *ZZ report*?

The ZZ report shows the statistics from a register's Z reports generated since the last ZZ report. The report is printed on the register's receipt printer.

To print a ZZ report

1 Press **Tasks**, and then press **Open/Close**.


F6, then 1

2 Press **ZZ Report**.


CTRL+5

Appendix **A**

Employee Roles

About employee roles

Microsoft Dynamics - Point of Sale provides a permission hierarchy for accessing your company's data. This ensures that sensitive financial data is not visible to the people who do not need to view it and that only authorized users can carry out specified business functions. Roles for the POS View are assigned, changed, or removed in Manager View.

The roles include:

- Owners—have access to all functions of POS View and Manager View.
- Managers—have access to most functions available to the Owner role but do not have access to use most database commands except Backup. Managers cannot add, update, and delete an employee or setup Practice mode. Additionally, an employee assigned the Manager role cannot view or edit the time clock information, create a time clock entry for an employee, or delete any time clock record.
- Supervisors—have access to almost the same functions in POS View as the Manager role, but Supervisors do not have access to Manager View. Additionally, in POS View, employees assigned the Supervisor role cannot run the Store Setup Wizard, delete customers, delete items, and view the time clock information for any employee or create a time clock entry for any employee.
- Cashiers—have basic role permissions that relate to operating their registers. See specifics in the following chart.

All employees assigned to each role will have the same rights. For this reason, you may be assigned a role despite a difference between your actual job title and the name of the role in Point of Sale. For example, you may be a cashier assigned to the Supervisor role in order to give you access to more Point of Sale functionality than other cashiers, even though your job titles are the same.

Know your security role rights and permissions

The following chart provides details of actions allowed for each role.

All employees, including those assigned to the Cashier role, can perform register tasks not listed in the rights table, such as processing basic sales transactions.

This right	Allows employees in these roles	To take this action
Access to Manager View	Owner Manager	Open Manager View. This provides security for your store database in addition to protecting your privacy.
Access to Store Setup Wizard	Owner Manager	Run the Store Setup Wizard.
Customers: add and update	Owner Manager Supervisor Cashier	Create or modify customer records.
Customers: delete	Owner Manager	Delete customer records.
Database menu: access to Backup command	Owner Manager	Use the Backup command on the Database submenu (available from the Tools menu).
Database menu: access to commands other than Backup	Owner	Use the other commands on the Database submenu (available on the Tools menu).
Employees: add, update, and delete any type	Owner	Create, modify, or delete employee records. Note: Managers will be able to view employee information in Manager View. Any employee can change their password from the Logon dialog box.
Items: delete	Owner Manager	Delete item records.
Practice mode: access to setup	Owner	Set up practice mode.
Practice mode: enter and exit	Owner Manager Supervisor	Enter or exit practice mode.
Register: change in-stock quantities in item properties manually	Owner Manager Supervisor	At the register, change the in-stock quantity of an item.

This right	Allows employees in these roles	To take this action
Register: change prices or apply discounts	Owner Manager Supervisor	At the register, change item prices, set price levels, or manually discount line items or transactions.
Register: change tax status	Owner Manager Supervisor	At the register, mark apply or clear taxes on a line item or transaction.
Register: close out	Owner Manager Supervisor Cashier	Close the batch (and open a new one) at a register.
Register: configure devices	Owner Manager Supervisor	Set up the hardware devices on a register so that they will work with Point of Sale.
Register: display cost information	Owner Manager Supervisor	View an item's cost at the register. For employees without this right, cost information will be hidden.
Register: display graphs	Owner Manager Supervisor	Access sales graphs at the register.
Register: display receipts	Owner Manager Supervisor Cashier	Access the Receipt Viewer at the register.
Register: enter closing amounts	Owner Manager Supervisor	Entering closing amounts at the register.
Register: enter opening amounts	Owner Manager Supervisor	Enter opening amounts at the register.
Register: exit Point of Sale	Owner Manager Supervisor	Close Point of Sale at a register.

This right	Allows employees in these roles	To take this action
Register: generate X reports	Owner Manager Supervisor	Run an X report.
Register: generate Z and ZZ reports	Owner Manager Supervisor Cashier	Close the batch (and open a new one) on a register by running
Time clock: display and add entries for any employee	Owner Manager	View the time clock information for any employee, or create a time clock entry for any employee.
Time clock: display, add, update, and delete entries for any employee	Owner	View or edit the time clock information for any employee, create a time clock entry for any employee, or delete any time clock record.
Transactions: cancel transactions	Owner Manager Supervisor Cashier	Cancel a transaction that's in progress at the register.
Transactions: perform cash drops	Owner Manager Supervisor	Perform a cash drop at the register.
Transactions: perform No Sales	Owner Manager Supervisor	Perform a No Sale at the register and open the cash drawer.
Transactions: perform payouts	Owner Manager Supervisor	Perform a cash payout at the register.
Transactions: perform returns	Owner Manager Supervisor Cashier	Process a return transaction.

This right	Allows employees in these roles	To take this action
Transactions: perform voids	Owner Manager Supervisor Cashier	Void a previously completed transaction
Transactions: place holds	Owner Manager Supervisor Cashier	Put a transaction on hold.
Transactions: post empty	Owner Manager Supervisor	Post a transaction even when it does not contain any items or payment information.
Transactions: sell items to employees with discounts	Owner Manager Supervisor	Process a sales transaction with a discount when the customer is an employee

Appendix B

Function Keys and Tasks

Function keys and tasks

The following chart provides a list of all function keys and what they do.

Function category	To do this	Press
Help	Access Help	F1
Items	Open the Items menu	F2 Items
Items	Enter information about a new item	F2+1 New
Items	View or edit an item already added to a transaction	F2+2 View/Edit
Items	Search for an item in the Item list	F2+3 Search
Items	Locate an item by its number in ascending numerical order	F2+4 By Item Number
Items	Locate an item by its description in alphabetical order	F2+5 By Description
Items	Locate a substitute item, if available	F2+6 Substitutes
Items	Receive items to add to inventory	F2+7 Receive Inventory
Customer	Open the Customer menu	F3 Customer
Customer	Add information about a new customer	F3+1 New
Customer	Edit or view information about an existing customer	F3+2 Edit/View
Customer	Search for an existing customer record by typing in the Search box.	F3+3 Search
Customer	Locate a customer record by customer number	F3+4 By Customer No.
Customer	Locate a customer record by name	F3+5 By Name
Customer	Locate a customer record by phone number	F3+6 By Phone Number

Function category	To do this	Press
Customer	Add a new shipping address to a transaction	F3+7 Shipping Address
Customer	Remove a customer from a transaction	F3+8 Clear
Transaction	Open the Transaction menu	F5 Transaction
Transaction	Edit a transaction	F5+1 Edit Transaction
Transaction	View or edit transaction details	F5+1, then CTRL+1 Details
Transaction	Apply a discount	F5+1 then CTRL +2 Discounts
Transaction	View or edit a sales tax	F5+1, then CTRL +3 Taxes
Transaction	Edit only the line item for a transaction	F5+2 Edit Line Item
Transaction	Remove the selected line item from the transaction	F5+2, then CTRL+1 Remove Item
Transaction	Mark the selected line item for return (adds a minus sign to the quantity)	F5+2, then CTRL+2 Return Item
Transaction	Discount the selected line item	F5+2, then CTRL+3 Discount Item
Transaction	Change the quantity of the selected line item	F5+2, then CTRL+4 Change Quantity
Transaction	Add a comment to the selected line item	F5+2, then CTRL+5 Add Comment
Transaction	Apply or clear a particular sales tax from the selected line item	F5+2, then CTRL+6 Select Sales Tax
Transaction	Apply or clear all sales tax from the selected line item	F5+2, then CTRL+7 Apply Tax/Clear Tax
Transaction	View substitutes for an item	F5+2, then CTRL+8 Select Substitute
Transaction	Remove a line item from a transaction	F5+3 Remove Line Item
Transaction	Place a transaction on hold or recall the transaction when ready to continue	F5+4 Hold/Recall
Transaction	Cancel a transaction	F5+5 Cancel Transaction

Function category	To do this	Press
Transaction	Open the cash drawer without a transaction	F5+6 No Sale
Tasks	Open Tasks menu	F6 Tasks
Tasks	Specify an opening or closing amount	F6+1 Open/Close
Tasks	Enter opening amounts	F6+1, then CTRL+1 Opening Amounts
Tasks	Enter closing amounts	F6+1, then CTRL+2 Closing Amounts
Tasks	Print an X report	F6+1, then CTRL+3 X Report
Tasks	Print a Z report	F6+1, then CTRL+4 Z Report
Tasks	Print a ZZ report	F6+1, then CTRL+5 ZZ Report
Tasks	Specify a drop or payout	F6+2 Drop/Payout
Tasks	Make a cash drop	F6+2, then CTRL+1 Cash Drop
Tasks	Make a payout	F6+2, then CTRL+2 Payout
Tasks	Find a receipt	F6+3 Find Receipts
Tasks	Look only in today's receipts	F6+3. then CTRL+1 Today's Receipts
Tasks	Look for receipts by date and time	F6+3, then CTRL+1 Receipts By Date/Time
Tasks	Look for receipts by batch number	F6+3, then CTRL+1 Receipts By Batch
Tasks	Reprint the last receipt	F6+4 Reprint Last Receipt
Tasks	Turn the printer on or off	F6+5 Printer On/Printer Off
Tasks	Void a previous transaction	F6+6 Void
Tasks	Switch to a different user	F6+7 Switch User
Tasks	Exit Point of Sale	F6+8 Exit
Tools	Open Tools menu	F7 Tools
Tools	Display one of the calculators	F7+1 Calculator

Function category	To do this	Press
Tools	Logon for the Time Clock	F7+2 Time Clock
Tools	Display a graph	F7+3 Graphs
Tools	Display the currency list	F7+4 Currency
Tools	Selects the Default currency	F7+4, then CTRL+1 Default Currency
Tools	Selects Canadian dollar	F7+4, then CTRL+2 Canadian Dollars
Tools	Selects US dollar	F7+4, then CTRL+3 US Dollars
Tools	Display the Basic and Advanced find window	F7+5 Find
Tools	Enter Practice Mode	F7+6 Enter Practice Mode
Tools	View or change system information,	F7+7 System
Tools	Display version and product support information	F7+7, then CTRL+1 About
Tools	Displays register properties	F7+7, then CTRL+2 Register Properties
Tools	Test POS hardware devices	F7+7, then CTRL+3 Test Hardware
Tools	View or change POS display settings	F7+7, then CTRL+4 Display
Tools	Switch to Manager View	F7+8 Manager View
Return	Open Return menu	F8 Return
Return	Return item by receipt	F8+1 By Receipt
Return	Return item by customer	F8+2 By Customer
Return	Enter Return Mode	F8+3 Enter Return Mode
Total	Total the transaction	F12 Total
Total	Automatically enter the exact amount of the sale in the selected payment method and post the transaction	+