Oracle® Retail Lucas
POS User Manual
Release 2.9.5.0.4 (2_9 Build 1423)
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ORACLE®

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ORACLE®

LUCAS

POS User Manual

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Contents

Note: The rebranding for the latest version of this documentation set is in development as part of post MICROS acquisition activities. References to former MICROS product names may exist throughout this existing documentation set.

An Overview on LUCAS POS

LUCAS POS is the universal retail management system for all sectors of the retail industry. With LUCAS POS, we have assembled a suite of applications that will reliably manage and control all business-critical processes in addition to providing valuable information about customers and employees.

LUCAS POS is programmed in Pure Java and runs on Microsoft Windows as well as Linux. Based on the ARTS data model, LUCAS POS employs XML interfaces to ensure easy integration with third party retail management, merchandising and stock solutions.

The following applications are part of the LUCAS POS Suite:

The **Point of Service (POS)** application offers a range of functions including till-oriented or operator-oriented operations, a convenient customer service system, the ability to process EFT payments and perform settlements during store opening hours, a sophisticated period concept, and secure operation based on user rights. The way buttons are arranged and the design of the configurable interface allow for quick and easy operation and reduce training to a minimum. The LUCAS POS application can be operated through a keyboard (MF2 or POS) and a two-line display instead of using a touchscreen.

In addition, the **Customer Module** for maintaining customer information may be integrated with the till. This allows for new customer profiles to be created at the till as well and for existing customer profiles to be viewed and edited. For each purchase a registered customer makes LUCAS POS links all items to the customer ID registered. Any discounts for specific customers or groups of customers defined using Mix&Match are applied. If the system is used at the head office, any data will immediately be available throughout the company.
Other benefits of centralized deployment include maintaining sales and voucher histories for each customer.

The **(Central) Store Management System (SMS/CSMS)** allows for centralized administration of all stores directly from the head office. It can be employed in stores (SMS) as well as at the head office (CSMS) and allows you to configure any workstation equipped with LUCAS POS. Moreover, it provides functions to execute daily or periodic closings, a comprehensive report function, safe administration, and closing procedures. Transactions can be analysed employing a variety of criteria (e.g. receipt totals, operators, tills), which simplifies store management and allows for improved customer service. In addition, the SMS/CSMS provides a downgraded version of warehouse management functions required on-site (maintenance of items, tax rates, and promotions), suitable for smaller maintenance tasks directly at the store.

The **Transaction Pool (T-Pool)** is an SQL database which runs in the head office. All company-related transactions (sales, closures, deposits, gift voucher redemptions, etc.) will be exported as XML data and will be sent from the stores to be automatically imported into the main database. Consequently all data generated in the stores will be contained in the T-Pool. This data is vital the Gift Certificate Server. However, it is possible to use this SQL database to configure and customise other analyses, or to transfer sales data from the T-Pool to the warehouse management system.

The **Gift Certificate Verification Server (GCVS)** is used in the head office and runs on a centralized database (T-Pool). It is employed if selling and redeeming gift vouchers is enabled across the entire company. Using the server simplifies the process of handling vouchers and reduces any occurring processing costs. The risk of multiple voucher redemptions is eliminated and therefore fraud is reduced significantly.

About this User Manual

This user manual outlines and explains the functions and operation of LUCAS POS.

For an overview on components and functions, read *An Overview on LUCAS POS*.

Chapter *1 Launching* will explain how to launch LUCAS POS.

In order to operate LUCAS POS, you must sign on. Chapter *2 Signing On* will provide you with any information necessary for sign-on.

Chapter *3 User Interface* will explain the LUCAS POS user interface. It will provide you with useful information on the touchscreen and on general control elements, such as input fields, list boxes and buttons.

The most important control functions within LUCAS POS executed in the **Transaction** and **Financing** windows, will be explained in chapters *4 The Transaction Window*, *5 Initiate Financing (The [Total] Button)* and *6 Financing a Transaction (The Financing Window)*.

Chapters *7 The Position Closed Window* and *8 Exiting the Till* will explain how to call up the **Position Closed** window and how to exit the till.

Chapter *9 Sales Functions* will explain all sales functions available. Here you will learn how to return or discount items, how to reset a transaction, or carry out a settlement.

Chapter *10 Financing Functions* will explain all financing functions available, e.g. financing a receipt in cash or in foreign currency, or through vouchers and coupons.

Frequently occurring keywords will be explained in chapter *11 Glossary*. You can also refer to chapter *12 Index* as well as the *Contents* to quickly access required information in this user's manual.

Information

> The range of functions available depends on the individual customising of your LUCAS POS and the individual user rights. This could mean that some functions described in this user manual may not be available when you sign on to LUCAS POS.
>
> The graphical user interface in the screenshots contained in this user manual may differ from the user interface at your till.

The Layout of this User Manual

Buttons, Notations und Cross References

Buttons and Notations

Terms and labelling which appear on the POS' interface are highlighted in **bold**.

The buttons visible on the screen are either displayed in graphic form or as follows:

[Button]

Functions which are directly dependent on the previous execution of another function may occupy the same button as is the case in **Suspend Sale** and **Resume Sale**. The **[Resume Sale]** button will only be active and visible once a **Suspend Sale** function has been executed. The **[Resume Sale]** button will occupy the same position as the **[Suspend Sale]** button.

Cross References

Cross references to any chapter in this user manual are displayed in *italics*. Hold CTRL and click on a cross reference to jump to the desired section within the user manual.

From chapter *9 Sales Functions* on you will find that all chapters introducing a new menu within LUCAS POS possess an additional cross reference tool for easy navigation between chapters. For an example of this tool, please refer to chapter *9.1 The Sale Menu.*

Terms used in the manual

Whenever the term "select" is used (e.g. "Select a position…", "Select a reason…" etc.), press the designated position, reason etc. on the touchscreen. The position, reason etc. is selected and highlighted in colour.

Options and Instructions

Options

Options are displayed with a bullet in front.

- Option 1
- Option 2
- Option 3

Whenever an option is displayed you may choose whether or not you would like to follow the instruction or set the preference described. There may be several options to choose from. Pick the one(s) which best suit your need at the point being. If none of the options described are needed skip the option and proceed with the following step or paragraph.

Instructions

Instructions consist of at least one or more action steps. They need to be executed in the order described.

1) Action step one.

This paragraph may be an explanation or description regarding the first action step. It may also describe a change of state introduced by executing the action step.

2) Action step two.
   a) Action step a) which is dependend on action step 2.
   b) Action step b) which is dependent on the execution of action steps 2 and a).
      Exception: equated and non-dependent action steps are marked by the word "or".
3) Action step three.

- Optional action step following action step 3.

In some cases instructions may have additional options. The operator may decide which of the options described is relevant to them or whether or not they would like to carry out or skip the option.

   a)   Options may have depending action steps as well.

Additional information

Additional information is displayed as follows.

Box with additional information

An icon to the left of the box indicates the type of information displayed.

NOTICE | This icon introduces information critical to a function's execution and therefore strongly recommended to follow.

Information | This icon introduces useful information which you may decide to follow.

1   Launching LUCAS POS

Click once (using a Linux system) or twice (using a Windows system) onto the icon at the screen to launch LUCAS POS.
The system is launched and the **Sign On** window opens (see *2 Signing On*).

2 Signing On

After launching LUCAS POS, the **Sign On** window opens. You need to sign on in order to work the till.

Sign On window

Sign on with Operator Cards

1) When using operator cards, simply scan the code.

No further entries required.

Sign on with Operator Number and Password

1) If you do not have an operator card enter your operator number into the **Operator** field and your password into the **Password** field.

2) Press **[OK]**.

You are signed onto the system and the **Transaction** window opens. LUCAS POS will be executed in the language set within your user profile and all functions you are authorised to perform are provided. Depending on the specific configuration of the system ("Customising"), the till drawer may open so that you can put your cash tray inside.

If you are not authorised to sign on or if the details you entered were incorrect, a corresponding dialogue box will appear. Correct your entry or cancel the login procedure.

Information

Once you have signed on, a receipt labeled "Sign On" is printed (if configured by default). It contains information on the sign on process.

An information message may also be displayed after signing on to the till (e.g. to inform you of a promotion). Confirm any information messages and sign the receipt printed.

3 User Interface

Your till is equipped with a touchscreen displaying the LUCAS POS user interface. The interface can be customised and displays a variety of control elements, depending on the function selected.

In addition to providing instructions on how to use the touchscreen, this chapter describes the structure of the user interface and explains the general control elements, such as input fields, output fields, and list boxes.

3.1 Touchscreen

Your till is equipped with a touchscreen to operate LUCAS POS.

1) Touch a control element (e.g. buttons, entry fields, etc.) displayed on the screen using your finger or a blunt object.

The control element is activated and the function requested is executed.

3.1.1 Cleaning the Touchscreen Surface

The touchscreen surface needs to be cleaned on a regular basis.

Information

> If you need to clean the touchscreen while the till is still operating, call the cleaning mode. In cleaning mode, most of the touchscreen's control elements are hidden to prevent you from accidentally operating the till while you are cleaning the display. The cleaning mode also provides you with important instructions on how to clean the touchscreen.

1) Press **[Cancel]** within the **Sign On** window.

The **Position Closed** window opens (see *7 The Position Closed* Window).

2) Press **[Clean Display]**.
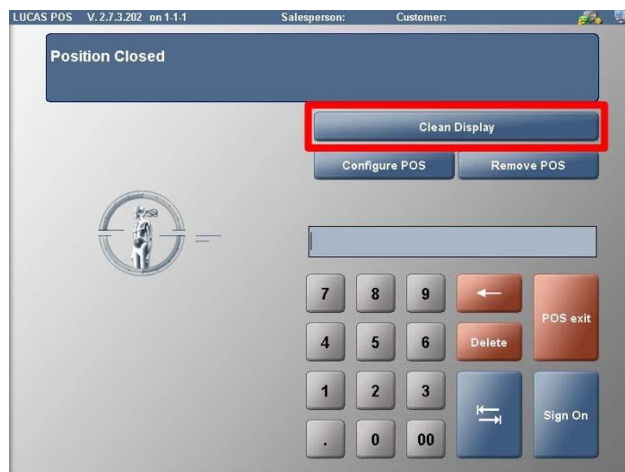
Position Closed window showing the **[Clean Display]** button

The **Clean Display** window is displayed along with a set of cleaning instructions.

3) Clean the screen following the instructions displayed.

NOTICE

Follow the cleaning instructions displayed onscreen.

Disregarding the cleaning instructions may result in damage to the screen surface!

- Use soft, lint-free cloths and commercial glass cleaners only.
- Spray glass cleaner onto the cloth, not directly onto the touchscreen.
- Ensure that the screen is completely dry before working with it again.

4) Press **[Finish]** within the **Clean Display** window to exit the cleaning mode.
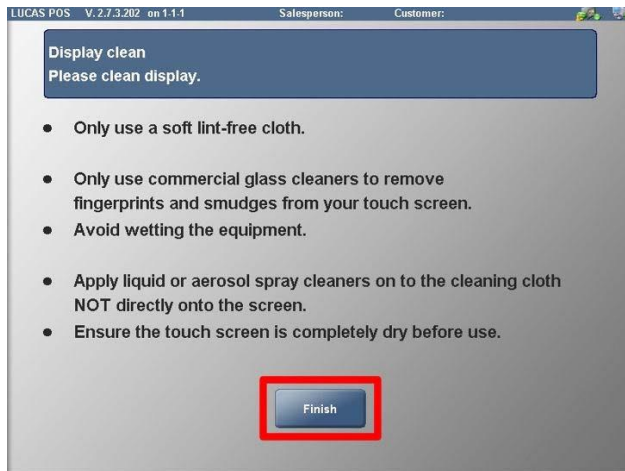
Clean Display window with **[Finish]** button

The **Clean Display** window closes and the **Position Closed** window re-opens.

3.1.2 Inaccuracies when using the Touchscreen

If the touchscreen is not correctly calibrated, inaccuracies such as the following may occur while working the till.

- The selected element on the user interface (e.g. a button) does not activate when touching the touchscreen, or only activates after repeated attempts.
- Instead of the selected element (e.g. a row in a table), the element above or below is activated.

If you observe any of these inaccuracies, ask the person in charge to contact Micros for a solution.

3.2 General Display and Control Elements

The general elements described below will appear frequently within LUCAS POS operations. They provide you with transaction details and allow you to enter information or select functions or positions displayed.

The window's function name   Header   General information on the current transaction

General display and control elements

Header

The header displays information about the system's name (**LUCAS POS**), the program's version and the company structure (Company ID, Store ID and POS ID). In addition, the header may display a salesperson ID and a customer ID if activated for the current transaction.

Information

If asked for the program version by a service technician or a member of the Micros hotline team simply quote it from the header.
The version number displayed in the image provided in this user manual may differ from the version you are using.

On the right hand side of the header two icons are displayed.

When this icon's signal lamp is flashing red, the till's cash limit is reached. Execute a safe drop before continuing working the till.

No safe drop is necessary while the signal lamp is green.

When the signal lamp is yellow, the till is disconnected from LUCAS services at the back office. It is therefore not possible to determine whether or not a safe drop is necessary.

When this icon's signal lamp is flashing red the connection to LUCAS services at the back office is interrupted.

When a green light is displayed, a connection to LUCAS services at the back office is established.

| Name of Program | /ersion | Company-ID – Store-ID – POS-ID | Salesperson (optional) | Customer (optional) | Icons |

LUCAS POS   V. 2.7.3.202   on 1-1-1   Salesperson: 6   Customer: 5100010000100493936

LUCAS POS Header

A Window's Function Name

Each window in LUCAS POS displays its function name informing you about the function or operation executed.

When registering items at the till, the window will be displaying **Transaction** as its function name. When financing a transaction, it will be named the **Financing** window. When carrying out a validated refund, the window's function name will be **Validated Refund**.

3.2.1 General Information on the Current Transaction

The **Transaction** and **Financing** windows display the number of the current transaction along with the number of items contained on this receipt.

In the case of no items being registered yet for the current transaction the **Transaction** window displays the number of the last transaction.

3.2.2 Buttons

On touching a button the operator will be expected to make an entry or execute an action: when opening another window (e.g. by pressing the **[Return]** button), cancelling a function (by pressing the **[Cancel]** button) or deleting contents of an input field (by pressing the **[Delete]** button).

If a button appears greyed out it is deactivated and cannot be activated on touch. The action implemented through this button cannot be executed at that time.
As soon as the prerequisites for calling this action are met, the button will appear active again.

3.2.2.1   Frequently used Buttons

This chapter will introduce a range of buttons which you will frequently encounter working the till.

The Virtual Keyboard

Any entries you will need to make working the till may be made using a computer keyboard. If a computer keyboard is not available at the till you are working you may use the virtual keyboard provided in LUCAS POS.

For this purpose you will find the button next to any input field requiring input other than numeric entries (for which you may use the numerical keypad).
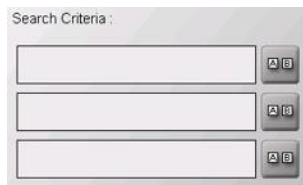
Input fields with virtual keyboard button

1)   On pressing , the virtual keyboard appears.

Virtual Keyboard

2)   Make the entry required using the virtual keyboard.

The button in this case is equal with the Shift key in any ordinary computer keyboard.

3)   Press **[OK]** to confirm your entry and return to the previous window.

In the case of several input fields each requiring an entry, repeat steps 1) through 3).

Arrow Keys

Whenever there is a list of positions or entries you will find arrow keys to navigate. This is especially useful if a list is extending beyond available space. You may therefore need to navigate up and down the list using the arrow keys.

Use   ▼   to navigate downwards step by step.

Use   ▲   to navigate upwards step by step.

Use   ▼▼   to scroll downwards page by page.

Use ⏫ to scroll upwards page by page.

Use ⏬ to jump to the end of the list.

Use ⏏ to jump to the top of the list.

View Details

Some functions will give you the opportunity to view further details to positions listed (see *3.2.5 List Boxes*).

On pressing 🔍 additional information to the position selected will be shown.

On pressing 🔍 you will return to the previous window.

To view detailed information about an item, select the item from the list of positions registered and press Details.

Article Information window

This window displays information such as merchandise groups, VAT groups, additional attributes, and the department where the item is listed and sold.

Information ⠿ On pressing **[Image]**, an image of the item is displayed.
If the **[Image]** button appears greyed out, there is no image available for this item.

Transaction Search

Any function requiring a receipt number will provide a transaction search function.

Transaction Search

In the case the receipt required is not available to you, you may search for it. Any information found is transferred to the function executed prior to the transaction search.

1) Press **[Search]**.

The **Transaction Search** window opens.

Transaction Search window

2) Determine the period of time the transaction has been concluded using the input fields **From** and **Until**.

3) Enter the workstation's number where the particular receipt has been issued into the **Workstation** field and enter the operator's number into the **Operator** field.

Skip these entries if the information is unknown.

In the **Store** field the store number is automatically displayed and cannot be changed.

4) Enter up to three keywords into the **Search Criteria** input fields.

If your till is not equipped with a computer keyboard use the *virtual keyboard* pressing .

5) Once you have made all entries required, press **[Search]**.

All receipts which meet the search criteria entered will be displayed consecutively.

In the upper section of the window you will find information on the receipt being displayed out of all receipts found (in this case it is **1/30**). Additional information on the **Store**, Workstation (**WS**), and the Operator (**OP**) is stated as well as the **Receipt** number.

6) Search for the particular receipt using the arrow keys.

Information ⠇⠇⠇ | For further Information on how to use the arrow keys please refer to the section on *arrow keys* in *3.2.2.1 Frequently used Buttons*.

7) Once the receipt required is displayed, press **[OK]**.

    a) On pressing **[OK]** the information required from the receipt displayed will be transferred back to be used by the function executed prior to the transaction search.

You will be directed back to the function previously executed and may proceed executing the particular function.

Example: In the case of having called the transaction search while executing a **Postvoid** function the desired postvoid will be executed on pressing **[OK]** in the **Transaction Search** window.

Denomination and Denomination Fields

Any function used to determine the cash holdings at a till will be equipped with an integrated denomination function to simplify the counting process.

1) Call the denomination function by pressing [Denominations].

The following example is stated using the **Settlement** function but is valid for any function providing the denomination button.
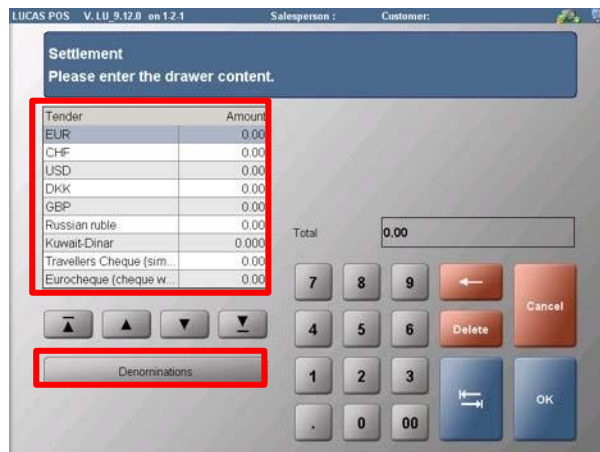
Settlement window − **[Denominations]** button, currencies available

2) Choose a currency from the list box and press **[Denominations]**.

Use the arrow buttons below the list for navigation.

> **Information**
>
> For further Information on how to use the arrow keys please refer to the section on *arrow keys* in chapter *3.2.2.1 Frequently used Buttons*.

The list box will be displaying a range of denomination fields.

3) Touch a denomination field and enter the amount counted.

4) Touch another denomination field and enter the amount counted.

Enter all notes and coins in your drawer in the way described above. The total amount of all cash entered will be displayed in the **Total** field.
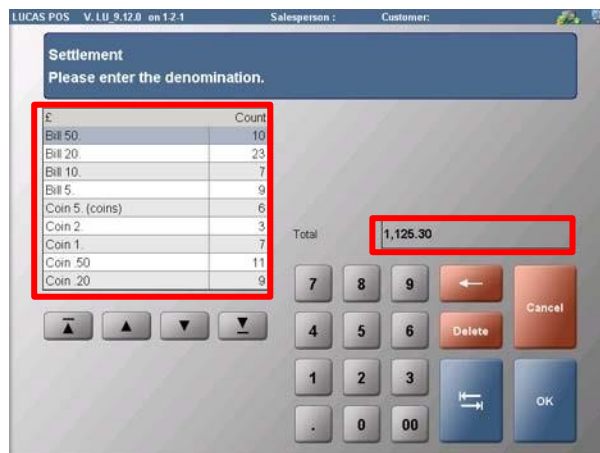
Settlement window − denomination fields with amounts entered
and total amount under **Total**

5) Once you have entered all notes and coins press **[OK]**.

The window will be displaying the list box with denomination fields. The total of all denominations entered is automatically transferred to the corresponding field in the list box.

Repeat steps 2) through 5) for all currencies available in your till drawer.

Sales functions equipped with an integrated denomination function are e.g. **Settlement** and **Cash Up**.

3.2.3   Input Fields and Keypad

 Input fields accept entries (e.g. amounts of money, item numbers or quantities).

- When touching an input field, the field is activated. A cursor will be displayed.
- Entries can be made using a scanner, a card-reading device or the **Keypad**.

 Enter numbers using the numerical keypad.

 Press **[Delete]** to delete an entry from an input field.

 Press this button to delete characters in an input field from right to left.

 Press this button to jump back and forth between different input fields.

 Press **[OK]** to confirm an entry.

 Press **[Cancel]** to close the current window and go back to the previous window without executing a function.

The buttons available in each window may vary and are depending on the respective function currently executed.

3.2.4 Output Fields

Total	50.00
Paid	20.00
To Pay	EUR 30.00

Output fields do not accept entries, they only display character strings, such as amounts, values and item numbers.

When touching an output field, it does not activate and no cursor will be displayed.

| Discountable Amount : | 50.00 |

Examples for output fields

3.2.5 List Boxes

Number	Reason
01	Conversion
02	Multiple Purchase
03	Too Large
04	Too Small
05	Unsatisfactory Goods
06	Other Conversion Reasons

List boxes allow for an entry to be selected from a preset selection. To select an entry or an item, you may either select it by touching it or by using the buttons below the list box.

3.2.6 Check Boxes

Click a check box to activate or deactivate functions and properties.

☐ The property/function is deactivated.

☑ The property is activated, the function can be executed.

3.2.7 Buttons for additional information

The button 🛈 may be located next to buttons and input fields. On pressing it, additional information on the desired input or selection is displayed.

3.2.8 Information and Error Messages

Information and error messages in LUCAS POS are displayed in dialogue boxes. An information or error message may open at any time while working the till.

Always read any message displayed before confirming it through pressing **[OK]**.

Error Messages

An error occured!

ERROR NO. 290
Transaction cancelled. Reprint not possible.
❌

OK

Press **[OK]** to confirm an error message. The window closes and you may continue working the till.

If you are not able to solve the error, refer to your system administrator for help.

Other Messages

Windows containing messages may provide you with additional information, point to an operating error or to a particular action step to be completed, or may contain a warning prior to executing a particular function.

Whenever a message is pointing to an operating error or to a particular action step to be completed…

- make an entry and press **[OK]**, or

- press **[OK]** to close the message and execute the action step described.

If a warning message is displayed, you may be able to decide whether or not you would like to further execute the function desired. Press **[Ignore]** to further execute the function regardless or press **[Cancel]** if you do not wish to proceed further. (Whether or not you are able to execute the function despite the warning is depending on the configuration of LUCAS POS and any user rights issued to the operator.)

4   The *Transaction* Window

Sales transactions are performed as follows.

1) Registering items, see *4.1 Registering Items.*

2) Initiate financing by pressing **[Total]** after having registered all items in the **Transaction** window.

3) Financing the transaction, see *6 Financing a Transaction (The Financing Window).*

This chapter will introduce you to control functions required to register items with LUCAS POS in various ways, it will explain how to cancel or post-void a receipt, and how to call up sales functions in general.

Information   Please refer to chapter *9 Sales Functions* for detailed information on individual sales functions.

Design of the *Transaction* Window

The **Transaction** window opens after sign on or after a transaction has been financed.

Items and other positions are registered, such as gift vouchers or downpayments. You may also execute numerous sales functions and create a sales receipt.

The **Transaction** window consists of the following sections.

| List of positions registered | Total | General information on the current transaction | Sales functions | Input fields/ Keypad |
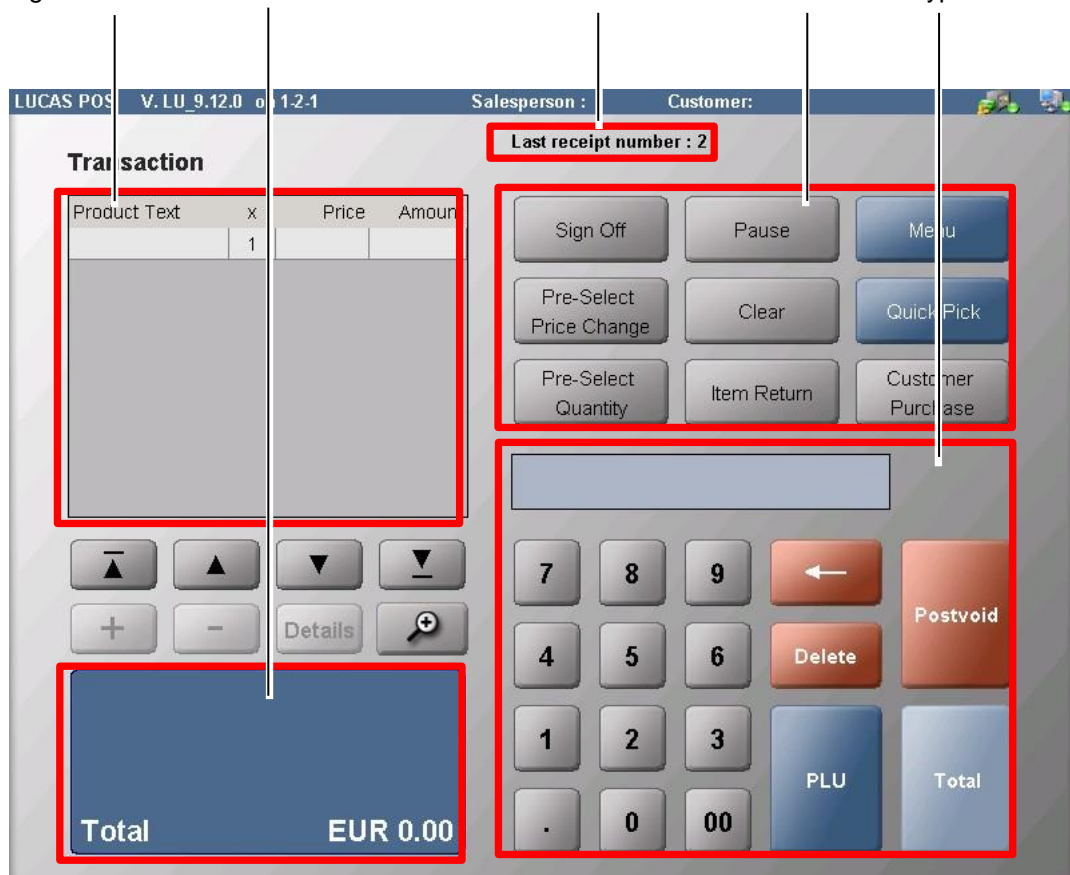
Design of the **Transaction** window

List of positions registered: All positions registered are listed here in the order of their registering, the topmost position being the first one registered. Here, you may cancel or duplicate registered items or obtain additional information.

Use the arrow buttons below to navigate within the list.

Total: Displays the current subtotal of all positions registered.

General information about the current transaction: The number of the current transaction along with the number of items registered on this receipt is displayed here.

If there are no positions registered yet, the number of the previous receipt will be displayed.

Sales Functions: Press **[Quick Pick]** to open the quick pick menu to register frequently sold items. To open the sales functions menu, press **[Menu]**. You may also execute frequently used functions from here without having to open the sales functions menu. For further information on available sales functions, see *9 Sales Functions*.

Input Field and **Keypad:** Using the keypad, you may enter numbers into the input field. This section also displays the **[Postvoid/Void All]** button, which is used to cancel or abort a receipt, as well as the **[Total]** button which calls up the **Financing** window (see *6 Financing a Transaction (The Financing Window))*.

4.1 Registering Items

Items may be registered in various ways.

- Scanning the barcode (see *4.1.1 Scanning a Barcode*)
- Using the quick pick menu (see *4.1.2 Registering Items from the Quick pick menu*)
- Manually entering the barcode/item number (see *4.1.3 Enter Barcode/Item Number manually*)

4.1.1 Scanning a Barcode

When scanning the barcode or entering the item number the item is registered along with any saved item information.

The item appears in the list of positions registered in the **Transaction** window.

Transaction window showing one registered item

4.1.2 Registering Items from the Quick pick menu

If an item does not qualify for scanning, add it to the quick pick menu as a fast and easy way to register this item.

NOTICE
> Any item must have been previously imported as a quick pick into LUCAS POS for them to be selected from the quick pick menu. If this is not the case, scan the barcode or manually enter the item number.

1) Press **[Quick Pick]** in the **Transaction** window.

The **Quick Pick** window opens.

Item Categories, with   Predefined buttons with
Menu open   Top 10-Items
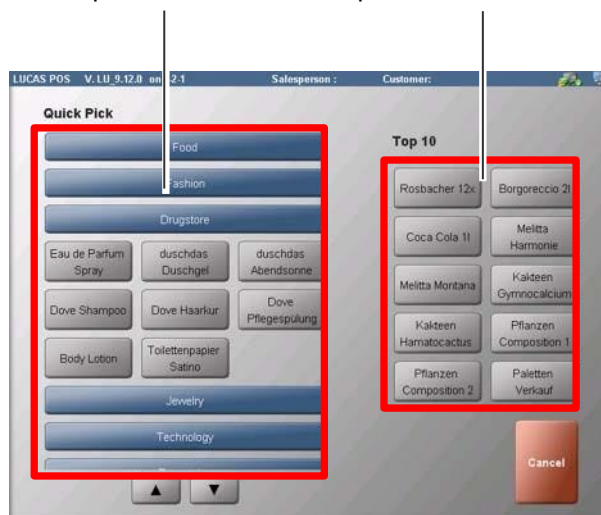
Quick Pick window

On the right hand side of the window you will find the **Top 10** list. It consists of ten centrally defined buttons which are occupied by items frequently sold or by items which do not carry barcodes (e.g. carrier bags). These items can be registered by simply pressing the corresponding button within the **Top 10** list.

On the left hand side of the window you will find a menu with items divided into several menus. On pressing a menu all items contained are displayed. Some may be grouped further into submenus. Register an item from a menu by pressing the corresponding button.

Quick Pick window showing items of the category **Drugstore**

2)   Now press an item button from the **Quick Pick** or from any of the menus or press **[Cancel]** to abort.

The **Transaction** window is displayed again.

The selected item appears as a position in the list of positions registered.

4.1.3   Enter Barcode/Item Number manually

Another way to register an item is to manually enter the barcode or item number.

1)   Press **[PLU]** within the **Transaction** window.

Information

> You may also enter the barcode or item number into the input field within the **Transaction** window first, then press **[PLU]** after that. If you choose to enter the information beforehand, skip the corresponding action step later in the process.

The **Sell Item** window opens.

Sell Item window

2)   Enter the barcode or item number into the input field.

3)   Press **[OK]**.

The **Transaction** window reappears and the item will be registered.

4.2 List of positions registered

All positions registered on a receipt are displayed in the order of their registering in the **Transaction** window in the list of positions registered.
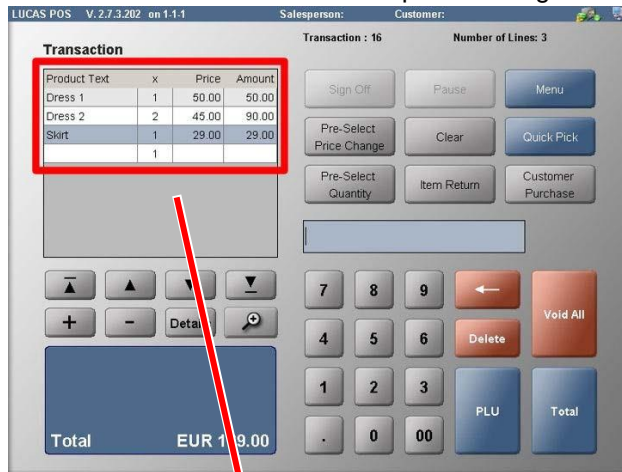
Transaction window

Item Description   Quantity   Price   Position's Total
                                  per Unit   (Price x Quantity)

Product Text	x	Price	Amount
Dress 1	1	50.00	50.00
Dress 2	2	45.00	90.00
Skirt	1	29.00	29.00
	1		

List of positions registered in the **Transaction** window

Use the arrow keys displayed below the list to scroll through the list and select a position.

Information

> For further Information on how to use the arrow keys please refer to the section on *arrow keys* in chapter *3.2.2.1 Frequently used Buttons*.

Total	EUR 169.00

Under Total you will find the current subtotal of all positions registered.

4.3 Line Cancellation (Cancelling a Previously Registered Item)

You may cancel an item from the list of positions registered before financing the transaction (e.g. if the customer changes his mind, or if you have entered the wrong item).

1) Select the item you would like to cancel from the list of positions registered in the **Transaction** window.

Use the arrow keys below the list for navigation if necessary.

2)	Press - :

The item is cancelled and displayed as follows in the list of positions registered.

Product Text	x	Price	Amount
Dress	1	49.95	49.95
Shirt	1	19.90	19.90
Trousers	1	58.69	58.69
Trousers	-1	58.69	-58.69
	1		

List of positions registered showing a cancelled item

NOTICE Note that only sales positions and refunded positions can be cancelled.
Individual discounts cannot be cancelled. If you need to cancel a discount issued for an item, you need to cancel the entire position and register it again (without a discount).

Depending on the specific configuration of LUCAS POS, it may not be possible to cancel a line for a receipt containing only a single item.

## 4.4	Duplicating Items on the Sales Receipt

Items which have already been registered may be duplicated.

NOTICE Items subject to an item duplication ban cannot be duplicated (you may change this setting in the (Central) Store Management System ((C)SMS) under **Item Maintenance➔ Item Options**).

Depending on the customising of LUCAS POS, duplication of items may be limited to an amount specified in the (C)SMS.

1)	Select the item you would like to duplicate from the list of positions registered in the **Transaction** window.

Use the arrow keys for navigation below the list of positions registered if necessary.

2)	Press + .

The item is duplicated and registered a second time.

## 4.5	Cancelling a Transaction

Any transaction which has not been financed yet may be cancelled if necessary (e.g. in the case a customer discovers they have forgotten their wallet).

1)	Press **[Void all]** to abort a transaction that has not been financed yet.

The **Cancel receipt** window opens.
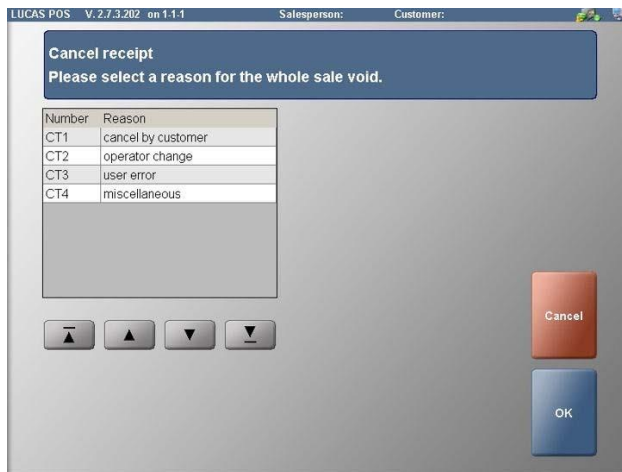
Cancel receipt window

2) Select the reason for the cancellation from the list box to the left.

3) Press **[OK]** to confirm your choice.

The transaction is cancelled. The **Transaction** window opens without the sale being concluded. A receipt labelled "Cancel receipt" is printed, containing all positions registered till the point of cancellation.

4.6   Postvoiding a Transaction

A transaction which has been concluded may be post-voided afterwards.

NOTICE

> Note that you can only execute a receipt cancellation when you have not yet registered any items on the current transaction. You may only postvoid a receipt in the store the receipt was originally printed at.
>
> When a transaction has been financed using EFT tender, cancellation of the payment may only be possible manually at the EFT terminal. In this case an error message will be displayed.

If you need to postvoid a receipt, proceed as follows.

1) If the particular receipt is at hand, press **[Postvoid]**.
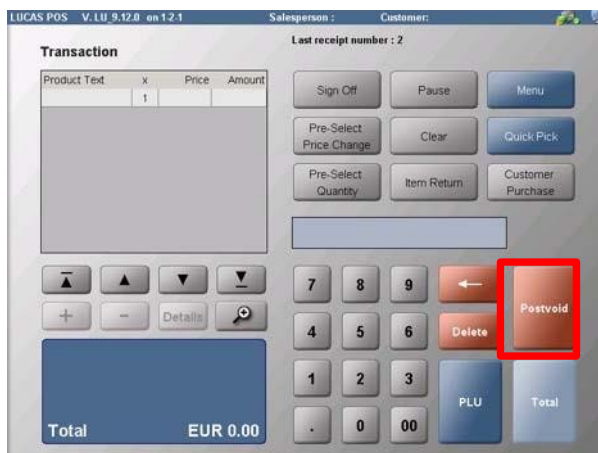
Transaction window with **[Postvoid]** button

The **Receipt Cancellation** window opens.

Receipt Cancellation window

2) Select the reason for the receipt cancellation from the list box to the left.

3) Scan the barcode of the receipt to be cancelled.

You may also enter any information required manually.

In this case ensure any information within the **Business Day** field (meaning the day the receipt was created) and in the **Workstation** field (the particular workstation the receipt was created at) is matching the information on the receipt. If necessary, correct the entries.

Information on the store is displayed by default in the **Store** field and cannot be changed.

- Enter the receipt number into the **Receipt Number** field.

The transaction is postvoided and the **Transaction** window opens. A receipt labelled "Receipt Cancellation" is printed.

4.7 Sales Functions − The [Menu] Button

NOTICE ⁝⁝⁝

> Please refer to chapter *9 Sales Functions* for an overview on all sales functions available.
>
> Whether or not a sales function can be executed at a particular time depends on the status of the sales process (e.g. whether or not items have been registered yet). If a sales function is currently not available, its button appears greyed out.
>
> The range of sales functions available to an operator may also depend on the customising of LUCAS POS and on the operator's user rights.
>
> Some functions can be executed even though the operator does not possess the user rights necessary. In this case you will be asked to call a number which will connect you to a staff member who will then generate an access code for you. This access code (valid only for one entry or over a limited period of time) will enable you to execute the function.

All sales functions available within LUCAS POS may be called up from the **Transaction** window. These functions are needed for different purposes when registering items, e.g. when entering quantities, modifying a price or refunding particular items.

1) Press **[Menu]** to open the **Operations** window, which displays menus for all sales functions.

Transaction window − **[Menu]** button

Operations window with all sales functions currently available

Information You may also use the assorted buttons in the **Transaction** window to quickly access frequently used sales functions without having to open the menu.
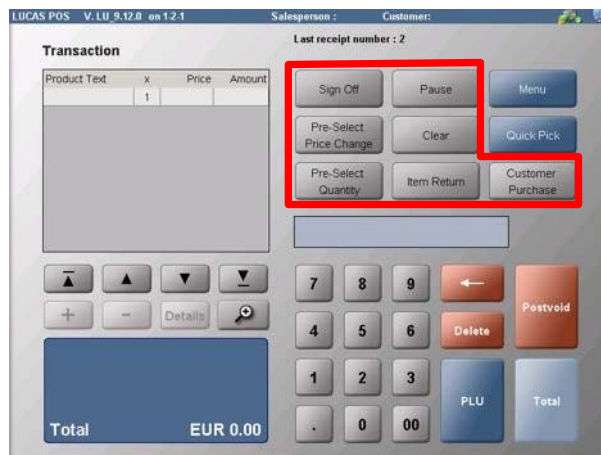
Transaction window− buttons with frequently used sales functions

5   Initiate Financing (The [Total] Button)

Once all positions from a customer's trolley have been registered, financing is initialised.

1)   Press **[Total]** at the bottom right of the **Transaction** window.
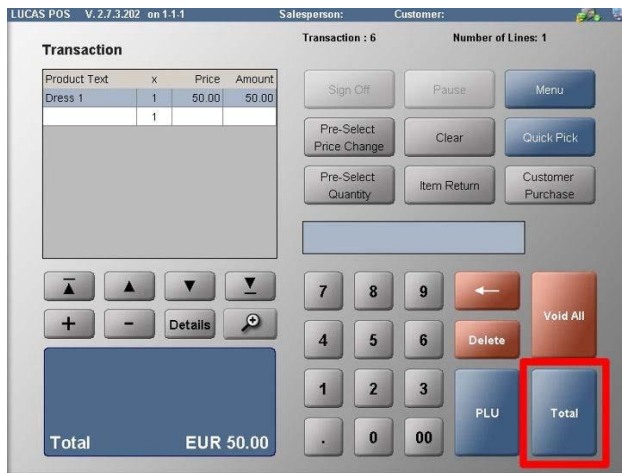
Transaction window − **[Total]** button

The **Financing** window opens.

All previously registered positions can now be financed (see *6 Financing a Transaction (The Financing Window)*). The transaction will be concluded.

Information ·· If the transaction's total equals zero, the **Financing** window does not appear. The receipt is printed on pressing **[Total]**.

6   Financing a Transaction (The *Financing* Window)

Sales transactions are performed as follows.

1) Registering items, see *4.1 Registering Items*.

2) Initiate financing by pressing **[Total]** after having registered all items in the **Transaction** window.

3) Financing the transaction, see *6 Financing a Transaction (The Financing Window)*.

This chapter will introduce you to some of the main control functions used in LUCAS POS to finance a transaction in the **Financing** window. It will explain the main payment options (payment in cash and local currencies), how to partially or completely cancel financing and how to call financing functions in general.

Information   Please refer to chapter *10 Financing Functions* for detailed information on individual financing functions.

![micros logo]

Layout of the *Financing* window

On pressing **[Total]** in the **Transaction** window (after having registered all positions) the **Financing** window opens.

A transaction is being concluded by accepting (in the case of a sale) and issuing (in the case of a return) means of payment of all kinds (e.g. cash, credit cards, vouchers or debit cards), possibly even combining different payment methods.

During the financing process you may call various financing functions, add reductions and discounts, or enter gift vouchers, etc.

The **Financing** window consists of the following components:

List of Payment Methods used Overview on Financing General information on the current transaction Financing Functions Input Fields/ Keypad
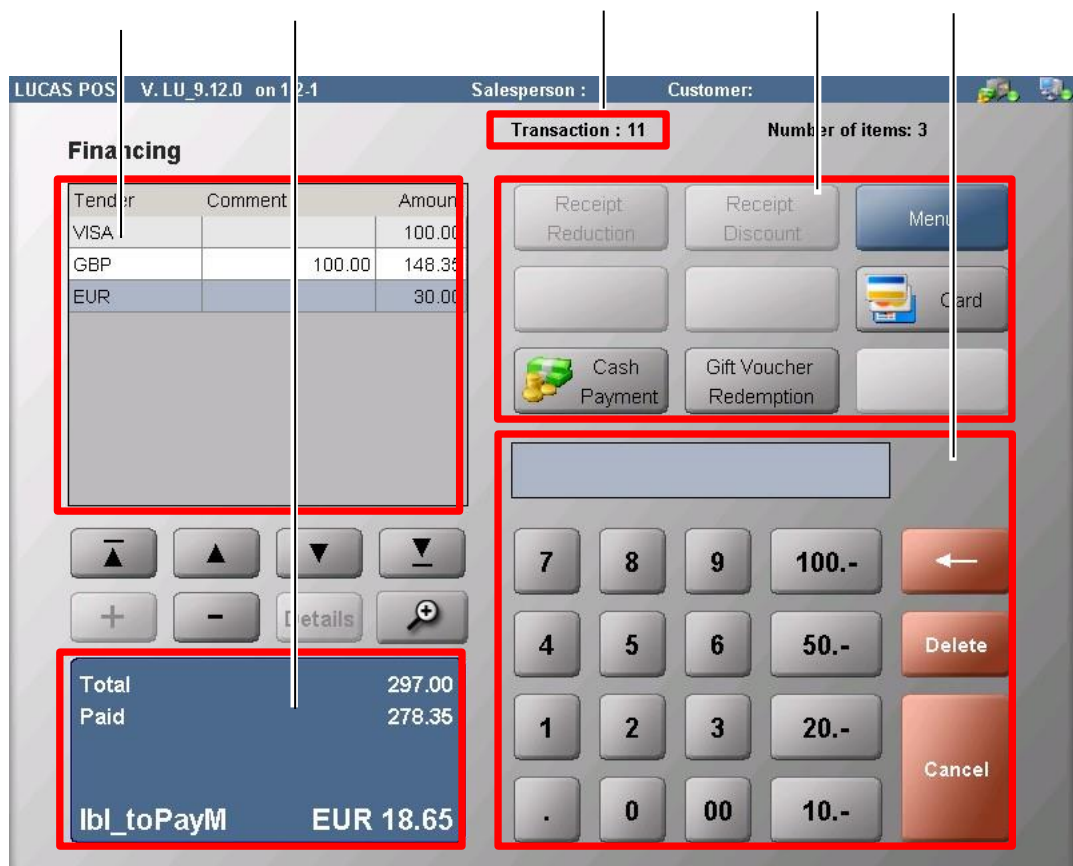
Design of **Financing** window

List of payment methods used: This section lists all payment methods used to finance the current transaction.

Below the list, you will find a range of buttons to navigate within the list.

> **Information** For further Information on how to use the arrow keys please refer to the section on *arrow keys* in *3.2.2.1 Frequently used Buttons.*

Overview on Financing: The total amount due and the amount already paid by the customer are displayed in this section.

General Information on the Current transaction: The number of the current transaction is displayed along with the number of items contained on this receipt.

Financing Functions: This section contains the **[Menu]** button which opens to another set of menus containing financing functions. A number of buttons with frequently used financing functions are displayed, which enables the operator to call them up without having to open the menu. Please refer to chapter *10 Financing Functions* for detailed information.

Input Field and Keypad: Use the keypad to enter numbers into the input field (e.g. cash or voucher numbers).

This section also contains the **[Cancel]** button, which ultimately aborts a financing process.

6.1 Financing a Transaction in Cash and Local Currency

Follow the steps listed below to finance a transaction in cash and in local currency.

1) Press the corresponding button for local currency in the **Local Currencies** menu or press ![Bar] in the financing window.

Information ·.·.·

You may also enter the amount due into the input field within the **Financing** window first, then press **[Local Currencies]** or press ![Bar] after that. If you choose to enter the information beforehand, skip the corresponding action step later in the process.

The **Cash payment** window opens.

Cash payment window

The amount due is displayed in the **Amount Due** field.

2) Enter the amount you have received in cash from the customer into the **Amount** field.

The amount due will already be entered by default. However, you may change the entry using the key pad.

3) Now press **[OK]**.

LUCAS POS will register the amount entered.

- If the exact amount due is paid, a receipt is printed and the till drawer opens. Place any amount of cash inside.

The **Transaction** window opens.

- If the amount due is overpaid, the customer will receive change.

The **Financing** window will appear. The amount entered appears in the list of payment methods used and the amount of the change to be paid to the customer is displayed under **Change**.

The till drawer opens. Place any amount of cash inside and take out the change.

Once the till drawer is closed or a financing function is called to pay the change using another payment method, a receipt is printed and the **Transaction** window opens.

- If the amount due has not been fully paid yet, the **Cash payment** window closes and the **Financing** window opens again.

The payment received is added to the list of payment methods used and the outstanding balance is displayed under **Amount Due**. The customer may choose to pay the outstanding balance using another payment method.

Denomination buttons

1) In the **Financing** window, press the denomination button equivalent to the amount paid by the customer:

If a customer pays with a 10, 20, 50 or 100 note in local currency, you may simply use the denomination buttons instead of manually entering the amount into LUCAS POS.

- If the exact amount due was paid, a receipt is printed and the till drawer opens. Place any amount of cash inside.

The **Transaction** window opens.

- If the amount due was overpaid, the customer will receive change. The **Financing** window opens. The amount entered appears in the list of payment methods used and the amount of the change to be paid to the customer is displayed under **Change**.

The till drawer opens. Place any amount of cash inside and take out the change.

Once the till drawer is closed or a financing function is called to pay the change using another payment method, a receipt is printed and the **Transaction** window opens.

- If the amount due has not been fully paid, the **Cash payment** window closes and the **Financing** window opens again.

The payment received is added to the list of payment methods used and the outstanding balance is displayed under **Amount Due**. The customer may choose to pay the outstanding balance using another payment method.

Information ░░░ | Please refer to chapter *10 Financing Functions* for further information on financing functions, e.g. on financing a transaction using other payment methods or on how to grant a rebate.

6.2 List of Payment Methods (Tender) Used

In the **Financing** window, all payment methods used to finance the current transaction are listed to the left.
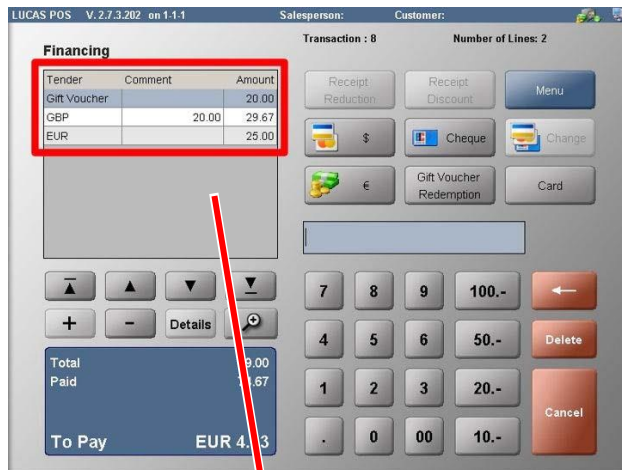
The **Financing** window

Payment methods used | Additional information | Value in local currency

Tender	Comment	Amount
VISA		100.00
GBP	100.00	148.35
EUR		30.00

List of payment methods used

You may use the arrow keys below to navigate within the list.

Information ░░░ | For further Information on how to use the arrow keys please refer to the section on *arrow keys* in chapter *3.2.2.1 Frequently used Buttons*.

6.3 Overview on Financing

Below the list of payment methods used you will find the **Financing Overview** section. Depending on the amount due and on how much of it has been financed − the following information may be displayed.

Total	Total value (in local currency) of the current transaction
Paid	Value (in local currency) already paid by the customer
Amount Due	Outstanding balance to be paid by the customer
Change	The change to be paid out to the customer
Paid back	Change already paid out to the customer

6.4 Abort Financing

Financing can be aborted at any time, e.g. to register additional items or in the case of a customer discovering they are missing their wallet.

1) To abort financing, press **[Cancel]**.

The **Transaction** window opens again. You may now register additional items, cancel items from the receipt or cancel the receipt, etc.

NOTICE

> Please note that financing cannot be aborted when a customer has paid and the purchase has therefore been concluded, even though the transaction might not be complete yet (e.g. the customer is expecting change).
>
> If you need to abort financing while the purchase has already been partially concluded, a warning message may be displayed (depending on the configuration of LUCAS POS). The message will recommend cancelling abortion due to administration charges that may occur when cancelling certain payment methods (e.g. credit cards).

6.5 Cancel Partial Financing

To cancel a partial financing (e.g. if a customer has already paid part of the amount due in cash, and would like to finance the remaining balance by credit card) carry out the following steps.

1) Select the position to be removed from the financing process from the list of payment methods used in the **Financing** window.

You may use the arrow keys below to navigate within the list.

Information

> For further Information on how to use the arrow keys please refer to the section on *arrow keys* in chapter *3.2.2.1 Frequently used Buttons*.

2) Press .

The amount is cancelled, deducted from the total amount and will be listed as a negative amount.

Tender	Comment	Amount
EUR		20.00
EUR		-20.00

List of payment methods used showing the cancelled amount

3) If you have already collected the cancelled amount, return the money to the customer.

6.6 Financing Functions − The [Menu] Button

You may call numerous financing functions from the **Financing** window.

1) Press **[Menu]** to open the **Operations** window.

All financing functions you may call are displayed here.

Information

> A number of frequently used financing functions is available within the **Financing** window. You may call them without having to open the menu.

Financing window − the **[Menu]** button

Operations window with all financing functions currently available
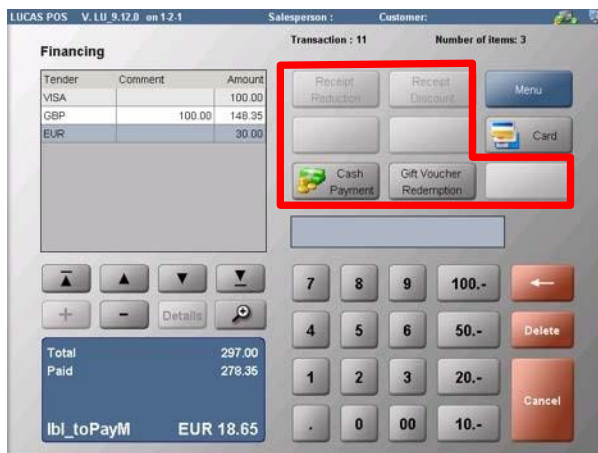
Financing window − frequently used financing functions

The number of financing functions displayed in the Financing window depends on the customising and may therefore be different for each LUCAS POS.

7 The *Position Closed* Window

The **Position Closed** window indicates that no operator is currently working the till. Although no sales-related entries can be made you may execute a number of other functions from this window.

NOTICE ⠇⠇⠇

> Note that any transaction needs to be concluded and no items must be registered on the current transaction.

1) Press **[Sign Off]** in the **Transaction** window (see *9.2.3 Sign Off*).

You are signed off from the till. The **Sign On** window opens.

2) Press **[Cancel]**.

The **Position Closed** window opens.

Position Closed window

No operator is signed on at the till and no entries can be made.

In the **Position Closed** window, you have a range of options:

- To sign on again, press **[Sign On]** (see *2 Signing On*).
- Press **[POS exit]** to exit LUCAS POS (see *8 Exiting the Till*).
- Press **[Clean Display]** to call the **Display Clean** window (see *3.1.1 Cleaning the Touchscreen Surface*).
- Press **[Info receipt]** to print an Info receipt (see *9.5.12 Info Receipt*)

8 Exiting the Till

If you need to exit LUCAS POS execute the following steps.

NOTICE

> Note that any transaction needs to be concluded and no items must be registered on the current transaction.
>
> It also requires special user rights to exit LUCAS POS.

1) Press **[Sign Off]** in the **Transaction** window (see *9.2.3 Sign Off*).

You are signed off from the till and the **Sign On** window opens.

2) Press **[Cancel]**.

The **Position Closed** window opens (see *7 The Position Closed Window*).

3) Press **[POS exit]**.

The **Exit** window opens.

Exit window

4) Enter your information into the **Operator** and **Password** fields.

5) Press **[OK]**.

You are now exiting LUCAS POS.

If you are not authorised to exit the till or if you entered incorrect details, an error message will appear. Correct your entries or cancel exiting LUCAS POS.

9 Sales Functions

Sales functions refer to all business processes that take place between retailer/ salesperson and the customer. Therefore, these menus contain all functions needed to conduct sales at the till.

These are functions for registering or refunding items (e.g. price reductions, validated refunds, post-select quantities), printing special receipts (e.g. tax free receipts), operating and clearing the till (e.g. pause, settlement), for making financial transactions (e.g. payments), for tender control (e.g. safe drops), for general service purposes (e.g. viewing exchange rates, reprinting receipts, turnover reports), for customer administration, stock control, and language settings.

All sales functions are called from the **Transaction** window before financing.

The following chapters explain sales functions available in LUCAS POS. They will be described in the same order they appear within the LUCAS POS menu.

Calling Sales Functions

You may call sales functions in several different ways and from different levels.

NOTICE

> Note that only those sales functions you can actually execute at a particular time can be activated. Which sales functions are currently available depends on the status of the sales process (e.g. on whether or not items have been registered). If a sales function is currently not available, its button is greyed out.
>
> The range of sales functions you can call also depends on the customising of your **LUCAS POS** and on your user rights.

Level 1

The **Transaction** window contains buttons with frequently used sales functions (e.g. **[Pre-Select Quantity]**, **[Pause]**, **[Item Return]** etc.). You can execute these functions easily by pressing the relevant button.
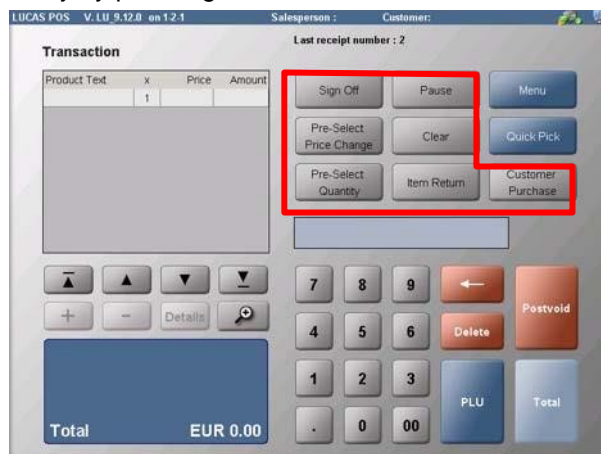
Transaction window with frequently used sales functions

Level 2

1)   Press **[Menu]** in the **Transaction** window for additional sales functions.

The **Operations** window opens.

To the right you will find ten centrally defined buttons ("Top 10") for frequently used sales functions, which you can execute directly by pressing the relevant buttons.

Operations window – **Top 10** sales functions

Level 3

To the left you will find a menu divided into several categories holding the complete range of sales functions available, sometimes even grouped into additional sub-categories.

Operations window with buttons for the Top 10 - sales functions

On pressing a category, all of its containing sales functions are displayed. Execute any by pressing the corresponding button.

Operations menu with open menu **Sale**

Menu **Sale**

Submenus,
e.g. **Transactions**

Different sales functions,
e.g. **Pre-Select Quantity**

If the range of menus cannot be displayed on one page, use ▲ and ▼ to scroll up or down the list of menus.

9.1 The *Sale* Menu

The **Sale** menu contains all sales functions needed for registering and returning items at the till.

Along with individual sales functions, this menu also contains three submenus: **Price Modification**, **Return & Sale** and **Transactions**, which also contain several sales functions.

Operations window − **Sale** menu

You will find the following sales functions within the **Sales** menu.

The Price Modification Submenu	*The Return & Sale Sub-menu*	*The Transactions Sub-menu*
Post Select Quantity/ Pre-Select Quantity	*Salesperson*	*Remove Salesperson*
Collect Miles	*Book Miles*	*Send Sales*
Clear	*Order*	

For detailed information on individual sales functions refer to the corresponding chapters.

9.1.1 The *Price Modification* Submenu

The **Price Modification** submenu contains all sales functions needed to change the original price of an item.

You may use these, e.g. to reduce the price of slightly damaged items, to hand a complimentary gift to a customer, or to issue an employee discount.

The **Operations** window − **Price Modification** submenu

You will find the following sales functions within the **Price Modification** submenu (**Sales** menu).

Post-Select Discount % (Percent)	*Post-Select Discount Value*	*Pre-Select Discount % (Percent)*
Clear Pre-Select Discount	*Pre-Select Price Change*	
		Modify Price
	Pre-Select Free Item	
Clear Price Change		*Post-Select Free Item*
Remove Free Item	*Employee Discount*	*Deselect Employee*
Increase in Price		

For detailed information on individual sales functions refer to the corresponding chapters.

Post-Select Discount % (Percent)

Grant a discount on a registered item.

NOTICE

> You need to have registered the item you wish to discount. The item needs to be eligible for a discount (settings can be changed in the (Central) Store Management System ((C)SMS) under **Item Maintenance ➔ Item Options**).
>
> Please note that it is not possible to discount an item below its defined price minimum. The price minimum can be defined in the (Central) Store Management System ((C)SMS).

1) Select the item you would like to discount from the list of positions registered in the **Transaction** window.

2) Press **[Post-Select Discount %]** within the **Price Modification** submenu (**Sales** Menu).

Information ➤➤➤ You may also enter the percentage into the input field within the **Transaction** window first, then press **[Post-Select Discount %]** within the **Price Modification** submenu (**Sales** Menu) after that. If you choose to enter the information beforehand, skip the corresponding action step later in the process.

The **Post-Select Discount %** window opens.

Post-Select Discount % window

The discountable price of the item is displayed in the **Discountable Amount** field.

3)   Select a description for the line discount from the list box to the left.

4)   Enter the desired percentage rate for the discount (e.g. 5.00) into the **Percent** field.

5)   Press **[OK]** to confirm your entries.

The **Transaction** window opens.

The discount is added to the list of positions registered as a negative amount and deducted from the transaction's total.

Transaction window − list of positions registered with discount

Post-Select Discount Value

Grant a fixed (absolute) price reduction on a registered item.

1) Select the item you would like to discount from the list of positions registered in the **Transaction** window.

2) Press **[Post-Select Discount Value]** within the **Price Modification** submenu (**Sales** menu).

The **Post-Select Discount Value** window opens.

Post-Select Discount Value window

The discountable amount (the amount allowed to be deducted from the original price without going below the price minimum) is displayed in the **Discountable Amount** field.

3) Select the type of price reduction from the list box to the left.

4) Enter the desired amount of the discount into the **Price Reduction** field.

5) Press **[OK]** to confirm your entries.

An information message appears asking whether you would like to proceed with a discount of x%.

a) Select **[No]** if you would like to correct your entry.

Correct your entry within the **Post-Select Discount Value** window.

b) Select **[Yes]** if you wish to proceed.

The **Transaction** window opens.

Transaction window − list of positions registered with price
reduction (abatement)

The reduction is added to the list of positions registered as a negative amount and
deducted from the transaction's total.

Pre-Select Discount % (Percent)

Grant a discount on all items registered after calling this function.

NOTICE

You may call this sales function at any point before financing is initialised. All items need
to be eligible for a discount (settings can be changed in the (Central) Store Management
System ((C)SMS) under **Item Maintenance ➔ Item Options**).

Please note that it is not possible to discount an item below its defined price minimum.
The price minimum can be defined in the (Central) Store Management System ((C)SMS).

You can call multiple pre-select discount percentages within one transaction.

1) Press **[Pre-Select Discount %]** within the **Price Modification** submenu (**Sales**
menu).

Information

You may also enter the percentage into the input field within the **Transaction** window
first, then press **[Pre-Select Discount %]** within the **Price Modification** submenu
(**Sales** menu) after that. If you choose to enter the information beforehand, skip the
corresponding action step later in the process.

The **Pre-Select-Discount Percent** window opens.

Pre-Select-Discount Percent window

2) Select a description for the pre-select discount percent from the list box to the left.

3) Enter a percentage for all items registered afterwards which are eligible for a discount into the **Percentage** field.

Note that any percentage needs to be entered with two decimal places.

4) Press **[OK]** to confirm your entries.

The **Transaction** window opens.

For all eligible items registered from now on, the discount will automatically be added to the list of positions registered as a negative amount, and will be deducted from the transaction's total.

The **Transaction** window − list of positions registered with a pre-select
discount percent of 10%

Information

Call **Clear Pre-Select Discount** to cancel the discounting of items. All items registered afterwards will be registered with the original price.

Clear Pre-Select Discount

If you have assigned a **Pre-Select Discount %** on the current transaction, you can deactivate it through the **Clear Pre-Select Discount** function.

NOTICE

A prerequisite for executing this function is that you have called a **Pre-Select Discount %** in the current transaction.

Please note, that this function cancels any **Pre-Select Discount %** for items that will be registered afterwards. Discounts on already registered items remain.

1) Press **[Clear Pre-Select Discount]** within the **Price Modification** submenu (**Sales** menu).

   a) If only one pre-select discount percentage is assigned to the transaction the discount is cancelled.

No discount will be issued to any of the items registered afterwards.

   b) If you have assigned multiple pre-select discount percentages to the current transaction, a window displaying all current pre-select discount percentages will appear.

Clear Pre-Select Discount window

2) Select the discount you would like to cancel from the list box to the left.

3) Press **[OK]** to confirm your selection.

The **Transaction** window opens. The discount selected is cancelled for all items registered afterwards.

Pre-Select Price Change

Execute this function before registering an item to determine a new price for the item.

NOTICE

Note that this sales function allows for price reductions as well as price increases.

It is not possible to change the price of an item to a point below its defined price minimum. The price minimum can be defined in the (Central) Store Management System ((C)SMS).

Pre-select a price change as follows.

1) Press **[Pre-Select Price Change]** within the **Price Modification** submenu (**Sales** menu).

Information ...

The **Pre-Select Price Change** window opens.
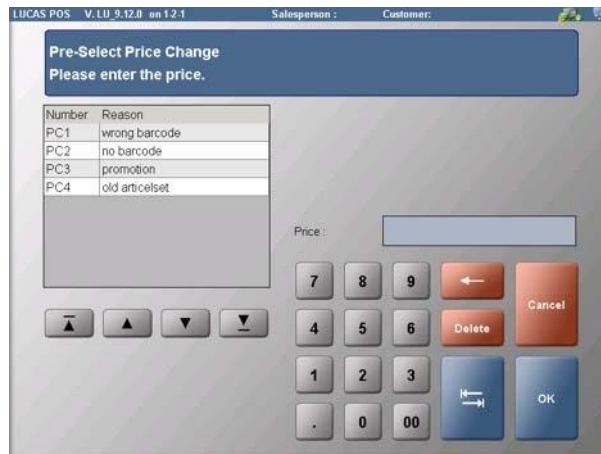
Pre-Select Price Change window

2) Select the reason for the price change from the list box to the left.

3) Enter a new price for the item into the **Price** field.

4) Press **[OK]** to confirm your entries.

The **Transaction** window opens.

The changed price is added to the list of positions registered in the **Transaction** window.

Transaction window − list of positions registered with pre-selected price change

5) Register the particular item.

The item is added to the position displaying the changed price within the list of positions registered. The position will be highlighted in colour.

Information ...

Modify Price

Execute this function before registering an item to determine a new price for this item.

NOTICE

> You need to have registered the item before you call the **Modify Price** function.
>
> Note that this sales function allows for price reductions as well as price increases.
>
> It is not possible to change the price of an item to a point below its defined price minimum. The price minimum can be defined in the (Central) Store Management System ((C)SMS).

1) Select the particular item within the **Transaction** window from the list box to the left.

2) Press **[Modify Price]** within the **Price Modification** submenu (**Sales** menu).

Information

> You may also enter the price change into the input field within the **Transaction** window first, then press **[Modify Price]** within the **Price Modification** submenu (**Sales** menu) after that. Note that any amount needs to be entered with two decimal places. If you choose to enter the information beforehand, skip the corresponding action step later in the process.

The **Modify Price** window opens.

Modify Price window

The item's original price is displayed under **Original Price**.

3) Select the reason for the price change from the list box to the left.

4) Enter a new price for the item into the **Price** field.

5) Press **[OK]** to confirm your entries.

The **Transaction** window opens. The changed price is registered and assigned to the selected item. The position appears highlighted in colour within the list of positions registered.

Information

> Call the **Clear Price Change** sales function to cancel a modified price.

Clear Price Change

Cancel various price changes already implemented (e.g. **Mark Down**, **Pre-Select Price Change**, and **Modify Price**).

NOTICE A prerequisite for executing this function is that you have performed a price change on an item in the current transaction.

1) Select an item with a previously changed price from the list of positions registered within the **Transaction** window.

2) Press **[Clear Price Change]** within the **Price Modification** submenu (**Sales** menu).

The price change for the selected item is cancelled. The original price is registered and included within the transaction's total. The position no longer appears highlighted in colour within the list of positions registered.

Pre-Select Free Item

After calling this function the next item will be registered as a free gift complimentary to a customer's regular purchase. However, it is important to register the item as such to ensure the inventory is kept up-to-date.

NOTICE In order to execute this function the particular item must not be registered yet.

1) Press **[Pre-Select Free Item]** within the **Price Modification** submenu (**Sales** menu).

2) Register the item you would like to define as a free gift.

NOTICE Note that only valid items can be registered as a free gift (this setting may be changed in the (Central) Store Management System ((C)SMS) under **Item Maintenance ➜ Item Options**).

The item is registered within the list of positions registered along with the comment "Free Gift". The original price for this item will not be considered in the transaction's total.

Transaction window – list of positions registered with free gift

Post-Select Free Item

On executing this function an item already registered and selected will be registered as a free gift complimentary to a customer's regular purchase. However, it is important to register a free gift to ensure the inventory is kept up-to-date.

NOTICE
> Note that only valid items can be registered as a free gift (this setting may be changed in the (Central) Store Management System ((C)SMS) under Item Maintenance ➔ Item Options).

NOTICE
> In order to execute this function you need to have registered the particular item.

1) Select the item you would like to hand out as a free gift from the list box to the left in the **Transaction** window.

2) Press **[Post-Select Free Item]** within the **Price Modification** submenu (**Sales** menu).

The item appears within the list of positions registered along with the comment "Free Gift". The original price for this item will not be considered in the transaction's total.

Transaction window − list of positions registered with free gift

Remove Free Item

Remove a designated but not yet registered free item from the current transaction as follows.

Information
> You need to have assigned a **Free Item** to the current transaction without actually having registered the particular item.

1) Press **[Remove Free Item]** within the **Price Modification** submenu (**Sales** menu).

The previously activated sales function **Free Item** is cancelled from the current transaction.

Employee Discount

If an employee from the same company would like to make a purchase at your till, you can assign the transaction to the particular employee. If an employee discount is linked to their employee ID it will automatically be deducted from all eligible items registered.

NOTICE ▸▸▸ | Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.

Any items you would like to assign an employee discount to must be eligible (change settings in the (Central) Store Management System ((C)SMS) under **Item Maintenance → Item Options**).

Note that a discount can be assigned to an employee in different ways. If the employee is assigned to a specific discount group, the discount is applied to their purchase. However, an employee discount can also be granted through Mix & Match. In this case, a set of different rules apply (e.g. discounts are granted only on specific items).

1) Press **[Employee Discount]** within the **Price Modification** submenu (**Sales** menu).

The **Employee Discount** window opens.

Employee Discount window

2) Enter the employee's number into the **Employee** field.

3) Press **[OK]**.

An information message opens requesting verification of the employee's ID.

4) After having verified the employee's ID, press **[OK]**.

The **Transaction** window opens. If the employee is eligible to an employee discount the discount will automatically be applied to all registered and valid items. The discount(s) will be listed within the list of positions registered

Transaction window − list of positions registered with employee discount

Deselect Employee

Cancel an employee discount assigned to the current transaction.

NOTICE Note that any transaction needs to be concluded and no items must be registered on the current transaction.

You need to have called the **Employee Discount** function.

1) Press **[Deselect Employee]** within the **Price Modification** submenu (**Sales** menu).

The employee discount assigned to the transaction is cancelled again.

Increase in Price

Assign a price to an item already registered which is above the original price.

NOTICE You need to have registered the particular item before executing this function.

1) Select an item from the list of positions registered to the left in the **Transaction** window.

2) Press **[Increase in Price]** within the **Price Modification** submenu (**Sales** menu).

Information You may also enter the price change into the input field within the **Transaction** window first, then press **[Increase in Price]** within the **Price Modification** submenu (**Sales** menu) after that. If you choose to enter the information beforehand, skip the corresponding action step later in the process.

The **Increase in Price** window opens.

Increase in Price window

The original price is displayed in the **Original Price** field.

3) Select the reason for the increase in price from the list box to the left.

4) Enter a new price into the **Price** field.

The new price needs to be above the original price.

5) Press **[OK]** to confirm your entries.

The **Transaction** window opens. The increased price is assigned to the previously selected item and is highlighted in colour.

Mark Down

Assign a price to an item already registered which is below its original price.

NOTICE ⋮⋮   You need to have registered the item you would like to assign a lower price to before executing this function.

It is not possible to change the price of an item to a point below its defined price minimum. The price minimum can be defined in the (Central) Store Management System ((C)SMS).

1) Select the particular item from the list of positions registered in the **Transaction** window.
2) Press **[Mark Down]** within the **Price Modification** submenu (**Sales** menu).

Information ⋮⋮   You may also enter the price change into the input field within the **Transaction** window first, then press **[Mark down]** within the **Price Modification** submenu (**Sales** menu) after that. If you choose to enter the information beforehand, skip the corresponding action step later in the process.

The **Mark Down** window opens.

The **Mark Down** window

The item's original price is displayed in the **Original Price** field.

3) Select the reason for the mark down from the list box to the left.
4) Enter a new price for the item into the **Price** field.

The new price must be below the original price.

5) Press **[OK]** to confirm your entries.

The **Transaction** window opens. The changed price is registered and assigned to the selected item. The new price is highlighted in colour.

| Information | To cancel a marked down price, call the **Clear Price Change** sales function. |

9.1.2 The *Return & Sale* Submenu

The **Return & Sale** submenu provides all the sales functions needed in order to return and sell items.

You will find the following sales functions within the **Return & Sale** submenu (**Sales** menu).

Item Return/	*Validated Refund*	
Remove Item Return		*Return* Empties
Item Search	*Voucher Sales*	*Downpayment Sales*
Hierarchy Search	*Voucher Return*	*Downpayment Return*

For detailed information on individual sales functions refer to the corresponding chapters.

Item Return

Refund a previously sold but now returned item by entering the relevant item information.

NOTICE

> Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.
>
> In addition, the particular item must not be subject to a return ban (change this in the (Central) Store Management System ((C)SMS) under Item Maintenance ➔ Item Options).

1) Press **[Item Return]** within the submenu **Return & Sale** (**Sales** menu).

The window **Return – Reason for Refund** appears.

Return window– Reason for Refund

2) Select the reason for the return from the list box to the left.

3) Press **[OK]** to confirm your selection.

The **Transaction** window opens. A position with the quantity "-1" is added to the list of positions registered.

Product Text	x	Price	Amount
	-1		

List of positions registered − returned position (item not yet registered)

4) Register the item you would like to return.

The **Return − Enter Price** window opens.

Return − Enter Price window

The **Price** field will display the original price of the registered item.

Check the price displayed against the price originally paid (e.g. if the item was marked down or discounted when it was originally sold).

5) Press **[OK]** to confirm your entry.

The **Transaction** window opens. The particular item is added to the list of positions registered as a negative amount.

Product Text	x	Price	Amount
Dress 1	-1	50.00	-50.00

List of positions registered − returned position showing registered item

Information

If you need to return multiple identical items, the number of items can be determined

- before calling the **Item Return** sales function by calling the **Pre-Select Quantity** sales function, or
- after registering the items to be returned by calling the **Post-Select Quantity** sales function.

Remove Item Return

Execute this function to remove a **Return** called in the current transaction.

NOTICE

A prerequisite for executing this function is that you have called a **Return** in the current transaction. However, the particular item must not be registered yet.

1) Press **[Remove Item Return]** within the **Return & Sale** submenu (**Sales** menu).

The Item Return assigned to the receipt is removed. The position with the quantity "-1" is removed from the list of positions registered.

Validated Refund

Refund an item previously sold, or all items on the entire receipt. The original receipt is recalled from the head office to ensure that only items which have been registered on the receipt are refunded.

Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.

In addition, an online connection to the head office or to the back office must be established for a validated refund (if no connection is available, execute the **Item Return** sales function instead to refund items).

The particular item must not be subject to a return ban (change this in the (Central) Store Management System ((C)SMS) under **Item Maintenance ➔ Item Options**).

If the validated refund is executed for a customer who is registered in the customer database, you will be asked whether the current transaction is a **Customer Purchase**. In this case any transaction (returning as well as purchasing) will be saved within the customer's profile.

1) Press **[Validated Refund]** within the **Return & Sale** submenu (**Sales** menu).

The **Validated Refund − Receipt Data** window opens.

Validated Refund − Receipt Data window

2) Check for the correct information being displayed in the fields **Store**, **Business Day** (business day the receipt was created) and **Workstation** (numbers of store and workstation the receipt was printed at).

Correct any information if necessary.

3) Enter the receipt number on which the particular item has been registered into the **Receipt Number** field or scan the barcode on the receipt.

Information

If the receipt's number is not available to you, you may execute a *transaction search*, see *3.2.2.1 Frequently used Buttons*.

4) Press **[OK]** to confirm your entries.

The **Validated Refund − Refund Data** window opens.
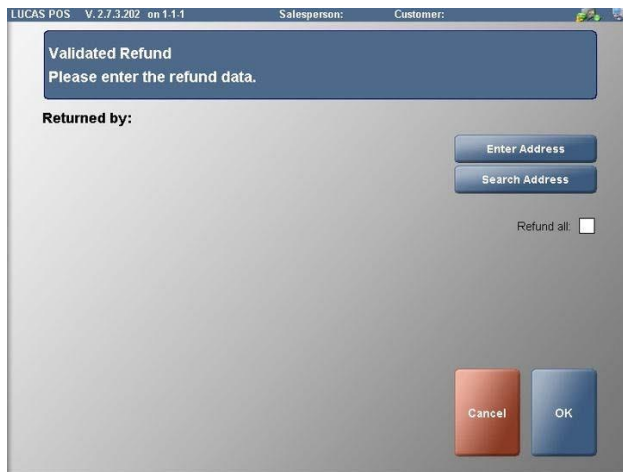
Validated Refund − Refund Data window

You now have several options to proceed with. These options are not dependent on one another; however, they do require the executing of the previously described steps.

Choose between…

- refunding one or more items from the receipt without acquiring or searching for customer information, see paragraph *refunding one or more items.*

- refunding all items on the receipt, see paragraph *refund the entire receipt.*

- acquiring customer information before the refund is executed (optional), see paragraph *Acquire Customer Information.*

- searching for customer information before the refund is executed (optional), see paragraph *Search for Customer Information.*

Refunding one or more Item(s)

When refunding one or more items from the receipt, proceed as follows.

Information ᐧᐧᐧ | If you need to refund the entire Receipt, proceed as described in the paragraph *refund the entire receipt.*

1) Press **[OK]**.

The **Transaction** window opens.

The list of positions registered will display all items contained on this receipt which are not subject to a refund ban. Item prices will not be displayed.

Transaction window with items eligible for a **Validated Refund**

2) Select the item which is refunded from the list box to the left.

3) Press **[Quantity Return]** in the **Transaction** window.

The **Validated Refund – Quantity and Reason** appears.

Validated Refund window **– Quantity and Reason**

4) Select the reason for the **Validated Refund** from the list box to the left.

5) If you are refunding more than one identical item, state the quantity to be refunded into the **Quantity** field.

Information
> **Maximum Quantity** displays how many identical items may be refunded from the receipt.

6) Press **[OK]** to confirm your entries.

The **Transaction** window opens. The returned item is registered with a negative amount.

Information
> If items on the receipt have been discounted, the transaction's total will be recalculated.

You may select and refund more items from the receipt, finance the transaction (i.e. refund the total from the **Validated Refund** to the customer) or register further items the customer may wish to purchase.

Refunding the entire receipt

If you need to refund the entire receipt:

1) Activate the **Refund All** check box.

2) Press **[OK]**.

The **Validated Refund – Select Reason** window opens.

Validated Refund – Select Reason window

3) Select the reason for the refund

4) Press **[OK]**.

The **Transaction** window opens. All Items from the receipt which are not subject to a return ban are listed with negative amounts.

Transaction window with negative amounts for refunded items

You may select and refund more items from the receipt, finance the transaction (i. e. pay the total from the **Validated Refund** to the customer) or register further items the customer may wish to purchase.

Acquire Customer Information

You may acquire the customer's information before proceeding with the **Validated Refund** (optional).

1) Press **[Enter Address]**:

   a) If the customer's information has not yet been saved in the database and the customer would like his information to be entered, or

   b) If the current transaction has been assigned to the customer prior to executing the validated refund and if the customer's information does not require an update.

The **Validated Refund – Address Entry** window opens.

Validated Refund – Address Entry window

2) Enter the customer's name, address and phone number.

If your till is not equipped with a keyboard use the *virtual keyboard* after pressing [AB].
If the current transaction has been assigned to the customer prior to executing the
validated refund all customer information contained in the database will be displayed
and may be edited for the purpose of the validated refund if necessary. However,
changes made will not be saved within the database.

3) Press **[OK]**.

The **Validated Refund – Refund Data** window opens.

Validated Refund – Refund Data window

If the entries made are incorrect, press **[Enter Address]** again and correct them.

- If only one item is refunded proceed as described in paragraph "*refunding one or more items*".

- If you would like to refund the entire receipt proceed as described in paragraph "*refund the entire receipt*".

Search for Customer Information

You may search for customer information within the customer database.

1) Press **[Search Address]** when:

    a) The customer would like to have his information entered into the database, or

    b) The customer's information has already been saved in the database, but the information has changed or there are several addresses at choice.

The **Validated Refund – Customer Address** window opens.

Validated Refund – Customer Address window

2) Select an address for this customer out of all addresses displayed.

Alternatively you may choose between the following options:

- If the customer's information has not yet been entered and saved within the database you may create a new entry for this customer on pressing **[Create Customer]** (see *9.6.2 New Customer*).

- You may change any existing customer information by pressing **[Change Customer]** (see *9.6.3 Modify Customer*).

- If the current transaction has not been assigned to the customer yet, you may search for his information in the database on pressing **[Search Customer]** (see *9.6.1 Customer View*).

3) After selecting the address, press **[OK]**.

The **Validated Refund – Refund Data** window opens.

Validated Refund – Refund Data window

4) Verify that the information displayed is correct. You may change the information on pressing **[Search Address]**.

- If only one item is refunded proceed as described in paragraph "*refunding one or more items*".

- If you would like to refund the entire receipt proceed as described in paragraph "*refund the entire receipt*".

Return Empties

Register any empties returned by the customer calling the **Return Empties** sales function.

1) Press **[Return Empties]** within the **Return & Sale** submenu (**Sales** menu).

The **Return Empties** window opens.

Return Empties window

2) Scan the item's barcode or manually enter the item number/barcode.

3) Press **[OK]** if you have entered the information manually (when scanning the item's barcode this is not necessary!).

The **Transaction** window opens. The empties are registered with a negative amount within the list of positions registered.

Item Search

You can use this function to search for an item and access more detailed information about it, e.g. its merchandise group. Any item found can be registered in the current transaction.

1) Press **[Item Search]** within the **Return & Sale** submenu (**Sales** menu).

The **Item Search** window opens.

Item Search window

2) Scan or enter the item you are looking for manually.

If your till is not equipped with a keyboard use the *virtual keyboard* after pressing ⌨.

a) From the **Search mode** drop-down list select **Item ID**. Scan the item number of the item which you are requiring more detailed information. Alternatively, you may manually enter the item number under **Search Criteria**.

b) From the **Search mode** drop-down list select **Item Barcode**. Scan the item number of the item which you are requiring more detailed information. Alternatively, you may manually enter the item number under **Search Criteria**.

c) From the **Search mode** drop-down list select **Item Description** and enter a description of the item under **Search Criteria** (e.g. the name of the item).

d) From the **Search mode** drop-down list select **Serial Number** and enter the serial number of the item under **Search Criteria**.

e) Enter one or more item attributes under **Colour**, **Style**, **Size**, and **Material** (e.g. "blue" under **Colour**).

3) Press **[OK]** if you have entered the information manually.

The search criteria entered will be transferred to the input field in the **Transaction** window.

4) Press **[OK]** to confirm the item search.

Depending on the number of items found, proceed as follows.

- Only one item met the search criteria, see paragraph *Only one item found.*
- Several items met the search criteria, see paragraph *Several items found.*

Only one item found

If only one item has met your search criteria the **Article Information** window will appear and display all information saved for this particular item.

Article Information window

1) Press **[Sell]**.

The **Transaction** window opens. The item is now registered and listed to the left.

- On pressing **[Back]** in the **Article Information** window you will return to the **Item Search** window and may conduct a new item search.
- On pressing **[Image]** an image of the item will be displayed.

Information	No item image is available in the case of **[Image]** being greyed out.

Several items found

If several items are found, the **Item Search − Results** window opens and displays all items matching the description entered.

Item Search − Results window

1) Select an item.

2) Press **[Sell]**.

The **Transaction** window opens. The item is now registered and listed to the left.

- On pressing **[Back]** in the **Item Search - Results** window you will return to the **Item Search** window and may conduct a new item search.

- On pressing **[Details]** in the **Item Search – Results** window an items saved details will be displayed.

The **Article Information** window opens.

Voucher Sales

Execute this function to sell a voucher. The voucher can be used as a method of payment in a later purchase.

NOTICE

A connection between the till and the central gift certificate server needs to be established in order to sell vouchers which require validation from the gift certificate server.

If the connection is not established a warning message is displayed. Decide whether or not you would like to continue selling the voucher despite missing validation.

1) Press **[Voucher Sale]** within the **Return & Sale** submenu (**Sales** menu).

The **Voucher Sales** window opens.

Voucher Sales window

2) Select a voucher description from the list box to the left.

The voucher descriptions depend on the specific voucher type. It further specifies the voucher's conditions e. g. minimum and maximum amount, validity, or whether the voucher number is automatically assigned. Voucher types can be created and configured in the (Central) Store Management System ((C)SMS).

Depending on the type of voucher selected, the entry fields **Valid Till** and **Number** may already contain entries. Minimum or maximum amounts may have to be considered when entering the voucher's amount.

3) If there is no information displayed in the **Valid Till** field, enter the particular date in the format of "MM/YY".

4) If there is no information displayed in the **Number** field, enter the voucher number.

In some cases the voucher number is printed on the voucher.

5) Enter the voucher's amount into the **Amount** field.

If the amount entered is incorrect a message will be displayed. Correct the entry.

6) Press **[OK]** to confirm your entries.

The **Transaction** window opens. The voucher is added to the list of positions registered and a receipt is printed after the transaction is financed.

Downpayment Sales

Instead of paying the full price immediately the customer may choose to make a down payment first.

1) Press **[Downpayment Sales]** within the **Return & Sale** submenu (**Sales** menu).

You may also enter the amount of the downpayment into the input field within the **Transaction** window first, then press **[Downpayment Sales]** within the **Return & Sale** submenu (**Sales** menu) after that. If you choose to enter the information beforehand, skip the corresponding action step later in the process.

The **Downpayment Sales** window opens.

Downpayment Sales window

- You may enter the first name and surname of the customer making a downpayment to the left. You may also enter an additional comment (e.g. state the item for which the downpayment is made).

Any information entered will be printed on the receipt along with the downpayment ID and the amount after financing.

If your till is not equipped with a keyboard use the *virtual keyboard* after pressing ⒜Ⓑ.

- If the customer has made a downpayment before and now wishes to increase the amount, activate the **Add to existing downpayment** checkbox.

The **Downpayment ID** input field is activated.

    a) Enter ID of the previous downpayment.

Information

> The **Downpayment ID** is located on the receipt.

2) Enter the amount of the downpayment into the **Price** field.

3) Press **[OK]** to confirm your entries.

The **Transaction** window opens. The downpayment is registered within the list of positions registered.

- You may register any additional items the customer wishes to purchase.

After financing the transaction, a receipt is printed. The downpayment ID and the amount of the downpayment appear as a sales position on the receipt.

Hierarchy Search

Search within merchandise groups for items and item information. Any item found can be registered directly from the hierarchy search and will be listed within the current transaction.

1) Press **[Hierarchy Search]** within the **Return & Sale** submenu (**Sales** menu).

The **Hierarchy Search** window opens.

Hierarchy Search window

This window displays all merchandise categories of the highest hierarchy level. In addition, the **Hierarchy Level** list box to the right shows the hierarchy level and the merchandise group currently selected.

2) Select the merchandise group you would like to search to the left.

3) Press **[Select]**.

If the selected merchandise group contains sub-categories, they will now be displayed.

Hierarchy Search window − second hierarchy level

    a)   Press **[New Search]** to return to the first hierarchy level and start a new search.

    b)   Press **[Back]** to move up one hierarchy level.

- If the selected category does not contain any sub-categories, all items within the merchandise category selected are listed (in this case skip the following action steps and proceed with action step *6)*).

4) Select the merchandise category you would like to search.

5) Press **[Select]** to open the merchandise category.

6) Repeat these steps until the lowest level ("Item Level") of a merchandise group has been reached. All items contained will be displayed.

Hierarchy Search window − lowest hierarchy level (item level)

7) Select the item you would like to obtain further information on or which you would like to register in the current transaction.

The **[Detail]** and **[Sell]** buttons are displayed.
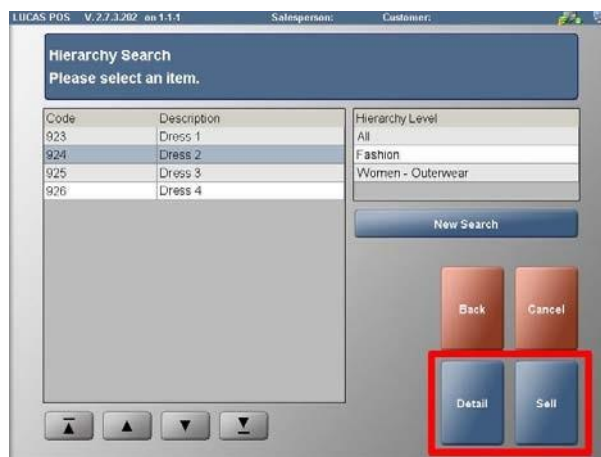
Hierarchy Search window − the lowest hierarchy level
(item level) with **[Detail]** and **[Sell]** buttons

8) Press **[Detail]** to obtain more detailed information on the selected item.

The **Article Information** window opens.

Article Information window

Any information available on the item selected is displayed here.

- On pressing **[Back]** in the **Article Information** window you will return to the **Hierarchy Search** window, where you can search for another item, or display information on another item.

- On pressing **[Image]** an image of the item is displayed.

Information ···· | If **[Image]** is greyed out no image is available.

- On pressing **[Sell]**, the **Transaction** window opens. The item is registered within the list of positions registered.

9) Press **[Sell]** to sell the item to the customer.

Voucher Return

If a customer wishes to return a voucher in exchange for a refund, you can use this function to accept the voucher and pay out the relevant amount to the customer.

NOTICE
A connection between the till and the central gift certificate server needs to be established in order to return vouchers which require validation from the gift certificate server.

- If the connection is not established an information message is displaying a code and your head office's phone number. Dial the number and state the code. The employee will be able to determine whether or not the voucher has been redeemed yet. If the voucher has not been redeemed yet you will be given a code to enable voucher return.

- Alternatively, a warning message might be displayed requesting your permission to proceed returning the voucher despite of the missing connection. Be aware that there will always be a risk involved if you choose to return the voucher despite the missing connection.

1) Press **[Voucher Return]** within the **Return & Sale** submenu (**Sales** menu).

The **Voucher Return** window opens.

Voucher Return window

2) Select the voucher type from the list box to the left.

The input fields **Company** and **Store** will already carry information. Check any information displayed here against the information on the customer's receipt and make corrections if necessary.

    a) Scan the barcode on the voucher or the voucher's receipt, or

    b) Manually enter the voucher number.

The **Transaction** window opens. The voucher's value will be registered with a negative amount within the list of positions registered and will be deducted from the transaction's total.

Downpayment Return

You may refund a downpayment previously made by a customer (e.g. if the customer took home an item he made a downpayment for but no longer wishes to purchase the item).

1) Press **[Downpayment Return]** within the **Return & Sale submenu** (**Sales** menu).

Information
You may also enter the number of the downpayment into the input field within the **Transaction** window first, then press **[Downpayment Return]** within the **Return & Sale** submenu (**Sales** menu) after that. If you choose to enter the information beforehand, skip the corresponding action step later in the process.

The **Downpayment Return** window opens.

Downpayment Return window

2) Enter the number of the downpayment you would like to refund into the **Downpayment ID** field.

Information :::

The **Downpayment ID** is located on the receipt.

3) Press **[OK]** to confirm your entry.

The **Downpayment** input field will display the amount of the downpayment.

Downpayment Return window displaying the downpayment

4) Press **[OK]**.

The **Transaction** window opens. The downpayment is registered with a negative amount and a comment reading "Downpayment Refund" within the list of positions registered.

Complaint No Receipt

Proceed as follows if items are being returned in the form of a complaint and the receipt is not at hand.

1) Press **[Complaint No Receipt]** within the **Return & Sale** submenu (**Sales** menu).

The **Complaint No Receipt** window opens.

2) Enter your staff ID (six-digit number) and press **[OK]**.

3) Enter the STID (four-digit number) and the business day then confirm your entries by pressing **[OK]**.

4) Enter your salesperson ID and press **[OK]**.

Complaint No Receipt window

5) Select the search mode from the drop-down menu.
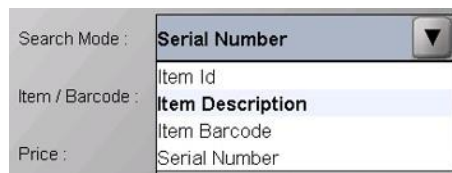
Drop-down menu

6) Enter the information required into the **Item/Barcode** field (depending on your selection from the drop-down menu).

7) Enter the item price.

You may skip this step. However, if you skip this step you will be asked to confirm the item's price at a later point.

8) Confirm your entry by pressing **[OK]**.

A list box with all items matching your search criteria will be displayed within the **Complaint No Receipt** window.

Complaint No Receipt window

9) Select the particular item from the list box.

You may use the arrow keys to navigate within the list box.

10) Confirm your selection through **[OK]**.

Complaint No Receipt window

11) Select the reason for the complaint and confirm your selection through **[OK]**.

The **Transaction** window opens. The item will be listed within the list of positions registered as a negative position.

- You may register more items.

12) Initiate financing and conclude the transaction.

The **Transaction** window will open.

Complaint With Receipt

If a customer is returning an item in the form of a complaint and the receipt is at hand proceed as follows.

1) Press **[Complaint With Receipt]** within the **Return & Sale** submenu (**Sales** menu).

The **Complaint With Receipt** window opens.

2) Enter your staff ID (six-digit number) and press **[OK]**.

The **Complaint With Receipt – Enter Data** window opens.

Complaint with Receipt window

3) Enter the STID (four-digit number).

4) Enter the business day, the workstation ID (two-digit number) and the transaction number, then confirm your entries by pressing **[OK]**.

You will find the information required on the receipt.

5) Enter your salesperson ID and press **[OK]**.

Complaint with Receipt window

6) Select the search mode from the drop-down menu.

Drop-down menu

7) Enter the information required into the **Item/Barcode** field (depending on your selection from the drop-down menu).

8) Enter the item price.

You may skip this step. However, if you skip this step you will be asked to confirm the item's price at a later point.

9) Confirm your entry by pressing **[OK]**.

A list box with all items matching your search criteria will be displayed within the **Complaint With Receipt** window.

Complaint with receipt window

10) Select the particular item from the list box.

You may use the arrow keys to navigate within the list box.

Information ...

Refer to *3.2.2.1 Frequently used Buttons* for detailed information on arrow keys and other buttons.

11) Confirm your selection through **[OK]**.

Complaint with Receipt window

12) Select the reason for the complaint and confirm your selection through **[OK]**.

The **Transaction** window opens. The item will be listed within the list of positions registered as a negative position.

- You may register more items.

13) Initiate financing and conclude the transaction.

The **Transaction** window will open.

Void Complaint

If you need to void a complaint, proceed as follows.

1) Press **[Void Complaint]** within the **Return & Sale** submenu (**Sales** menu).

The **Void Complaint – staff ID** window opens.

2) Enter your staff ID (six-digit number) and press **[OK]**.

The **Void Complaint – Enter Data** window opens.

3) Enter the STID (four-digit number) and the business day then confirm your entries by pressing **[OK]**.

4) Enter your salesperson ID and press **[OK]**.

The **Void Complaint – Enter Data** window opens.
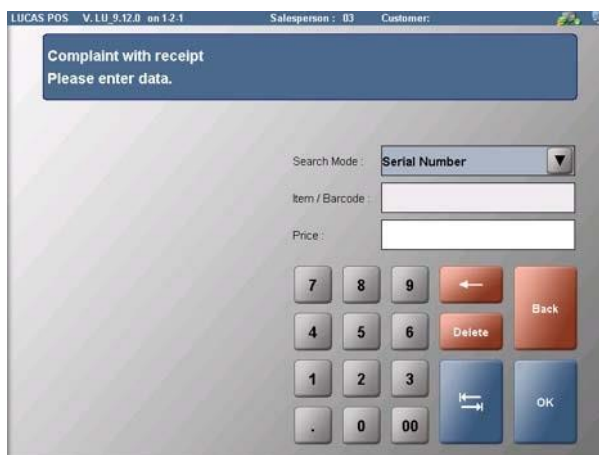
Void Complaint window

5) Select the search mode from the drop-down menu.
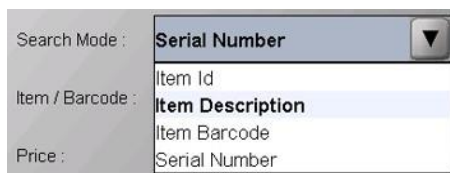
Drop-down menu

6) Enter the information required into the **Item/Barcode** field (depending on your selection from the drop-down menu).

7) Enter the item price.

You may skip this step. However, if you skip this step you will be asked to confirm the item's price at a later point.

8) Confirm your entry by pressing **[OK]**.

A list box with all items matching your search criteria will be displayed within the **Void Complaint** window.

Void Complaint window

9) Select the particular item from the list box.

You may use the arrow keys to navigate within the list box.

Refer to *3.2.2.1 Frequently used Buttons* for detailed information on arrow keys and other buttons.

10) Confirm your selection through **[OK]**.

The **Transaction** window opens. The item will be listed within the list of positions registered.

- You may register more items.

11) Initiate financing and conclude the transaction.

The **Transaction** window will open.

Return No Receipt

If a customer wishes to return an item without the receipt at hand proceed as follows.

1) Press **[Return No Receipt]** within the **Return & Sale** submenu (**Sales**

menu). The **Return No Receipt – Staff ID** window opens.

2) Enter your staff ID (six-digit number) and press **[OK]**.

3) Enter the STID (four-digit number) and the business day then confirm your entries by pressing **[OK]**.

4) Enter your salesperson ID and press **[OK]**.

The **Return No Receipt** window opens.
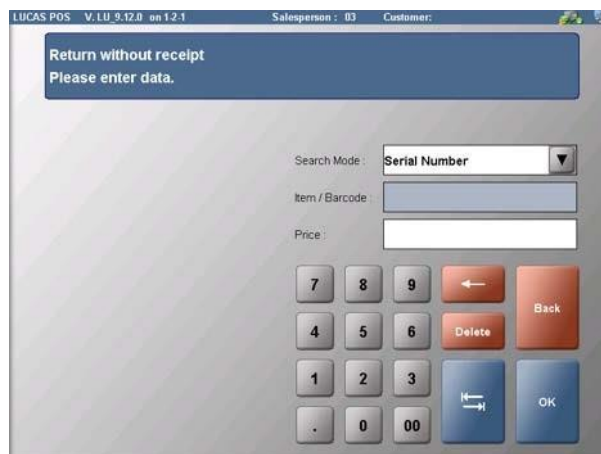
Return without Receipt window

5) Select the search mode from the drop-down menu.
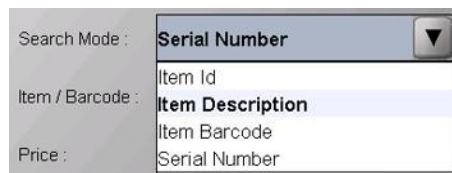
Drop-down menu

6) Enter the information required into the **Item/Barcode** field (depending on your selection from the drop-down menu).

7) Enter the item price.

You may skip this step. However, if you skip this step you will be asked to confirm the item's price at a later point.

8) Confirm your entry by pressing **[OK]**.

A list box with all items matching your search criteria will be displayed within the **Return No Receipt** window.

Return No Receipt window

9) Select the particular item from the list box.

You may use the arrow keys to navigate within the list box.

Information

Refer to *3.2.2.1 Frequently used Buttons* for detailed information on arrow keys and other buttons.

10) Confirm your selection through **[OK]**.

Return No Receipt window

11) Select the reason for the complaint and confirm your selection through **[OK]**.

The **Transaction** window opens. The item will be listed within the list of positions registered as a negative position.

- You may register more items.

12) Initiate financing and conclude the transaction.

The **Transaction** window will open.

Return With Receipt

If a customer is returning an item and the receipt is at hand proceed as follows.

1) Press **[Return With Receipt]** within the **Return & Sale** submenu (**Sales** menu).

The **Return With Receipt** window opens.

2) Enter your staff ID (six-digit number) and press **[OK]**.

The **Return With Receipt – Enter Data** window opens.

Return with Receipt window

3) Enter the STID (four-digit number).

4) Enter the business day, the workstation ID (two-digit number) and the transaction number, then confirm your entries by pressing **[OK]**.

You will find the information required on the receipt.

5) Enter your salesperson ID and press **[OK]**.

Return with Receipt window

6) Select the search mode from the drop-down menu.

Drop-down menu

7) Enter the information required into the **Item/Barcode** field (depending on your selection from the drop-down menu).

8) Enter the item price.

You may skip this step. However, if you skip this step you will be asked to confirm the item's price at a later point.

9) Confirm your entry by pressing **[OK]**.

A list box with all items matching your search criteria will be displayed within the **Return With Receipt** window.

Return with receipt window

10) Select the particular item from the list box.

You may use the arrow keys to navigate within the list box.

> **Information**
>
> Refer to *3.2.2.1 Frequently used Buttons* for detailed information on arrow keys and other buttons.

11) Confirm your selection through **[OK]**.

Return with Receipt window

12) Select the reason for the complaint and confirm your selection through **[OK]**.

The **Transaction** window opens. The item will be listed within the list of positions registered as a negative position.

- You may register more items.

13) Initiate financing and conclude the transaction.

The **Transaction** window will open.

Void Return

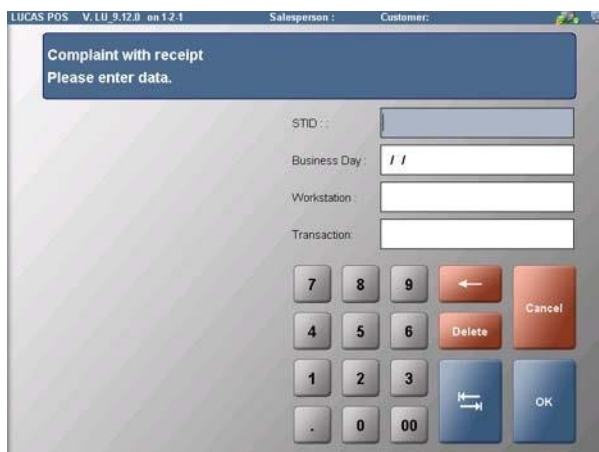If you need to void a return, proceed as follows.

1) Press **[Void Return]** within the **Return & Sale** submenu (**Sales** menu).

The **Void Return – staff ID** window opens.

2) Enter your staff ID (six-digit number) and press **[OK]**.

The **Void Return – Enter Data** window opens.

3) Enter the STID (four-digit number) and the business day then confirm your entries by pressing **[OK]**.

4) Enter your salesperson ID and press **[OK]**.

The **Void Return – Enter Data** window opens.

5) Select the search mode from the drop-down menu.

Drop-down menu

6) Enter the information required into the **Item/Barcode** field (depending on your selection from the drop-down menu).

7) Enter the item price.

You may skip this step. However, if you skip this step you will be asked to confirm the item's price at a later point.

8) Confirm your entry by pressing **[OK]**.

A list box with all items matching your search criteria will be displayed within the **Void Return** window.

Void Return window

9) Select the particular item from the list box.

You may use the arrow keys to navigate within the list box.

Information	Refer to *3.2.2.1 Frequently used Buttons* for detailed information on arrow keys and other buttons.

10) Confirm your selection through **[OK]**.

The **Transaction** window opens. The item will be listed within the list of positions registered.

• You may register more items.

11) Initiate financing and conclude the transaction.

The **Transaction** window will open.

Return External Shop

Proceed as follows to return goods sold through another store.

1) Press **[Return External Shop]** within the **Return & Sale** submenu (**Sales** menu).

The **Return External Shop – staff ID** window opens.

2) Enter your staff ID (six-digit number) and press **[OK]**.

The **Return External Shop – Enter Data** window opens.

3) Enter the order number (14-digit number) and the position number (two-digit number) and confirm through **[OK]**.

You will find the information required on the receipt of the external store.

4) Enter your salesperson ID and press **[OK]**.

Return external Shop window

5) Select the search mode from the drop-down menu.

Drop-down menu

6) Enter the information required into the **Item/Barcode** field (depending on your selection from the drop-down menu).

7) Enter the item price.

You may skip this step. However, if you skip this step you will be asked to confirm the item's price at a later point.

8) Confirm your entry by pressing **[OK]**.

A list box with all items matching your search criteria will be displayed within the **Return with Receipt** window.

Return with receipt window

9) Select the particular item from the list box.

You may use the arrow keys to navigate within the list box.

10) Confirm your selection through **[OK]**.

11) Select the reason for the complaint and confirm your selection through **[OK]**.

The **Transaction** window opens. The item will be listed within the list of positions registered as a negative position.

- You may register more items.

12) Initiate financing and conclude the transaction.

The **Transaction** window will open.

Complaint External Shop

Proceed as follows to return goods in the form of a complaint, sold through another store.

1) Press **[Complaint External Shop]** within the **Return & Sale** submenu (**Sales** menu).

The **Complaint External Shop – staff ID** window opens.

2) Enter your staff ID (six-digit number) and press **[OK]**.

The **Complaint External Shop – Enter Data** window opens.

3) Enter the order number (14-digit number) and the position number (two-digit number) and confirm through **[OK]**.

You will find the information required on the receipt of the external store.

4) Enter your salesperson ID and press **[OK]**.

Complaint external Shop window

5) Select the search mode from the drop-down menu.

Drop-down menu

6) Enter the information required into the **Item/Barcode** field (depending on your selection from the drop-down menu).

7) Enter the item price.

You may skip this step. However, if you skip this step you will be asked to confirm the item's price at a later point.

8) Confirm your entry by pressing **[OK]**.

A list box with all items matching your search criteria will be displayed within the **Complaint with Receipt** window.

Complaint with receipt window

9) Select the particular item from the list box.

You may use the arrow keys to navigate within the list box.

Information ⋙ | Refer to *3.2.2.1 Frequently used Buttons* for detailed information on arrow keys and other buttons.

10) Confirm your selection through **[OK]**.

11) Select the reason for the complaint and confirm your selection through **[OK]**.

The **Transaction** window opens. The item will be listed within the list of positions registered as a negative position.

- You may register more items.

12) Initiate financing and conclude the transaction.

The **Transaction** window will open.

9.1.3 The *Transactions* Submenu

This submenu contains sales functions you can use to suspend or resume a transaction.

Operations window − **Transactions** submenu

You will find the following sales functions within the **Transactions** submenu (**Sales** menu).

Suspend Sale/
Resume Sale

For detailed information on individual sales functions refer to the corresponding chapters.

Suspend Sale

The **Suspend Sale** function allows for the registering process to be interrupted without cancelling the receipt. The transaction will be put on hold and can be resumed at a later point to register additional items or for financing purposes.

NOTICE ⋙ | You must have registered at least one item on the current transaction and the transaction must not be within the financing stages yet in order to execute this sales function.

1) Press **[Suspend Sale]** within the **Transactions** submenu (**Sales** menu).

The transaction will be stored. A receipt labelled "Suspend Receipt" is printed. It will be used to identify the suspended transaction. Scan the barcode printed on the receipt when resuming the transaction.

Information ⋙ | Call the **Resume Sale** sales function to resume a previously suspended receipt.

Resume Sale

Resume a previously suspended transaction by calling the **Resume Sale** sales function.

NOTICE	Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.
	There must be a receipt previously suspended within the system to call **Resume Sale**.

1) Press **[Resume Sale]** within the **Transactions** submenu (**Sales** menu).

The **Resume Sale** window opens.
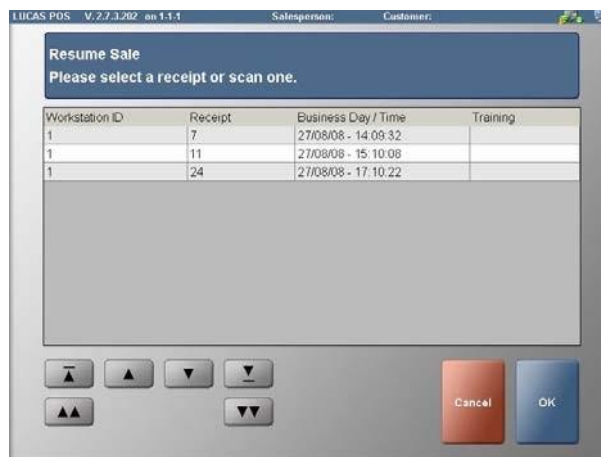
Resume Sale window

All suspended transactions are displayed here along with the workstation number, business day and time.

    a)   Scan the barcode of the transaction's receipt you wish to resume, or

    b)   Select the suspended transaction from the list of transactions.

If you scan the receipt the **Transaction** window will open. The transaction is resumed and the items already registered are displayed within the list of positions registered.

2) Select a particular transaction from the list, then press **[OK]**.

The **Transaction** window opens. The selected transaction is resumed and the items already registered on this receipt are transferred to the list of positions registered.

9.1.4   Pre-Select Quantity

Before registering an item you can determine the item's quantity.

NOTICE	This sales function can only be called in advance to registering the particular item. Items which are weighed to determine the price (e. g. fruit and vegetables) as well as items subject to a select-quantity-ban are excluded (change settings in the (Central) Store Management System ((C)SMS) under **Item Maintenance ➔ Item Options**).

1) Press **[Pre-Select Quantity]** within the **Sales** menu.

Information	You may also enter the quantity into the input field within the **Transaction** window first, then press **[Pre-Select Quantity]** within the **Sales** menu after that. If you choose to enter the information beforehand, skip the corresponding action step later in the process.

The **Select Quantity** window opens.

Select Quantity window

2) Enter the quantity you would like to register for the next item into the **Quantity** field.

3) Press **[OK]** to confirm your entry.

The **Transaction** window opens. The quantity is added to the list of positions registered.

Transaction window − position with pre-selected quantity

4) Register the item.

The item is registered and listed within the list of positions registered. The price for one item is displayed under **Price**; the total amount of the position according to the quantity previously entered appears under **Amount**.

Information

You may change the quantity for an item by selecting the relevant item, executing the **Post-Select Quantity** sales function and entering a different quantity

9.1.5 Post-Select Quantity

This sales function is adding a quantity to an item already registered. This way several items with the same item number or the same barcode do not have to be scanned or entered separately.

NOTICE

> This sales function can only be called after registering the particular item. Items which are weighed to determine the price (e. g. fruit and vegetables) as well as items subject to a select-quantity-ban are excluded (change settings in the (Central) Store Management System ((C)SMS) under **Item Maintenance ➔ Item Options**).

1) From the list of positions registered in the **Transaction** window, select the item of which the customer wishes to purchase several.

2) Press **[Post-Select Quantity]** within the **Sales** menu.

Information

> You may also enter the quantity into the input field within the **Transaction** window first, then press **[Post-Select Quantity]** within the **Sales** menu after that. If you choose to enter the information beforehand, skip the corresponding action step later in the process.

The **Select Quantity** window opens.

Select Quantity window

3) Enter the quantity you would like to register for the previously registered or selected item into the **Quantity** field.

4) Press **[OK]** to confirm your entry.

The item is registered and listed within the list of positions registered. The price for one item is displayed in the **Price** field; the total amount of the position according to the quantity entered appears in the **Amount** field.

Transaction window − position with multiple identical items

| Information | You may change the quantity for an item by selecting the relevant item, executing the **Post-Select Quantity** sales function and entering a different quantity. |

9.1.6 Salesperson

Assign a transaction or individual positions to a specific salesperson (e.g. if this salesperson provided advice which has ultimately lead to the customer making a purchase and is therefore entitled to a commission).

Information	All items registered after calling this sales function will be assigned to the particular salesperson. The salesperson ID will be printed on the receipt. Therefore, if only part of the sold items should be assigned to a salesperson, the other items need to be registered before calling the **Salesperson** sales function.
	When an entire receipt should be assigned to one salesperson no items must be registered yet on the current transaction before calling the sales function.
	If there are several items which need to be assigned to different salespersons, call the **Salesperson** function for each salesperson one after the other, then registering the items assigned to them.
	Depending on the customising of your LUCAS POS, an operator with salesperson rights may be assigned automatically for the first transaction after they sign on.

1) Press **[Salesperson]** within the **Sales** menu.

| Information | You may also enter the Salesperson ID into the input field within the **Transaction** window first, then press **[Salesperson]** within the **Sales** menu after that. If you choose to enter the information beforehand, skip the corresponding action step later in the process. |

The **Salesperson** window opens.

Salesperson window

2) Enter the salesperson's number into the **Salesperson ID** field.

3) Press **[OK]** to confirm your entry.

The **Transaction** window opens. All items registered after this will be assigned to the salesperson specified. The salesperson ID is displayed in the window's header.

The **Transaction** window − salesperson ID in the header

NOTICE

Note that a salesperson can only be assigned to the current transaction. After the transaction is concluded the assignment is revoked.

9.1.7 Remove Salesperson

Call the **Remove Salesperson** sales function in order to remove a previously assigned salesperson from the current transaction.

Information

Note that a salesperson has to be assigned to the current transaction in order to call this sales function.

1) Press **[Remove Salesperson]** within the **Sales** menu.

The **Remove Salesperson** window opens.

Remove Salesperson window

2) Select the salesperson you would like to remove from the current transaction from the list box to the left.

3) Press **[OK]** to confirm your selection.

The **Transaction** window opens. The salesperson is removed from the current transaction and the header no longer displays a salesperson ID.

9.1.8   Collect Miles

Register miles for the Lufthansa Miles & More bonus programme.

NOTICE ▸▸▸

> A prerequisite for collecting miles is an online connection between the till at which the miles are being collected and the central Miles & More database.

1) Press **[Collect Miles]** within the **Sales** menu.

The **Collect Miles** window opens.

Collect Miles window

2) Enter the customer's Miles & More card number into the **Card Number** field or swipe the card through the card reader.

3) Press **[OK]** to confirm your entry.

The **Transaction** window opens. Miles & More miles are credited for the current transaction. The receipt displays the amount of miles collected for this purchase.

9.1.9 Book Miles

If booking miles from the Miles & More programme could not be executed during the transaction (e.g. due to a missing Miles & More card or because the connection between LUCAS POS and the Miles & More database was not established), you may credit miles for the particular purchase at a later point.

NOTICE

A connection between LUCAS POS and the Miles & More database has to be established in order to book miles.

Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.

1) Press **[Book Miles]** within the **Sales** menu.

The **Book Miles** window opens.

Book Miles window

2) Scan the receipt and enter the transaction's total into the **Amount** field.

- Instead of scanning the receipt you may enter the information manually. Note that the date the receipt was created needs to be entered in the format of DD/MM/YY.

3) Press **[OK]** to confirm your entries.

The **Book Miles** window closes and the **Miles & More** window opens.

Miles & More window

4) Enter the customer's Miles & More card number into the **Card Number** field or swipe the card through the card reader.

5) Press **[OK]** to confirm your entry.

An information message opens to inform you about the successful booking.

6) Press **[OK]** in the information window.

The **Transaction** window opens. Miles & More miles are credited. A receipt of the booking is printed.

9.1.10   Send Sales

The current transaction can be defined as a shipping order. The delivery address is stated and printed on the receipt for delivery purposes. A delivery fee is automatically charged. Items may be registered on the current transaction already but financing must not be initialised yet.

1) Press **[Send Sales]** within the **Sales** menu.

Send Sales window

You now have several options to proceed with. These options are not dependent on one another; however, they do require the executing of the previously described step.

Choose between…

- acquiring customer information (optional), see paragraph *Enter Address.*
- searching for customer information (optional), see paragraph *Search Address.*

Enter Address

Press **[Enter Address]**:

   a)   If the customer information has not yet been saved in the database and the customer would like his information to be entered, or

   b)   If the current transaction has been assigned to the customer prior to executing the **Send Sales** function and if the customer information does not require an update.

The **Send Sales – Address Entry** window opens.

Send Sales – Address Entry window

Enter the customer's name and the destination address.

If your till is not equipped with a keyboard use the *virtual keyboard* after pressing ⌨.

If the current transaction has been assigned to the customer previously to executing the **Send Sales** sales function all customer information contained in the database will be displayed and may be changed if necessary.

Changes made will not be saved within the database.

Search Address

1) Press **[Search Address]** when:

  a) The customer would like to have their information entered into the database, or

  b) The customer's information has already been saved in the database, but the information has changed or when there are several addresses at choice.

The **Send Sales – Customer Address** window opens.

Send Sales – Customer Address window

If the current transaction has been assigned to the customer prior to executing the **Send Sales** sales function all customer's information contained in the database will be displayed and may be changed if necessary.

2) Select an address out of all addresses displayed for this customer.

Alternatively you may choose between the following options:

● If the customer's information has not yet been entered and saved within the database you may create a new entry for this customer on pressing **[Create Customer]** (see *9.6.2 New Customer*).

- You may change any existing customer information by pressing **[Change Customer]** (see *9.6.3 Modify Customer*).

- If the current transaction has not been assigned to the customer yet, you may search for his information in the database on pressing **[Search Customer]** (see *9.6.1 Customer View*).

3) After selecting the address, press **[OK]**.

The **Transaction** window opens.

Transaction window with shipping fee

The shipping fee will be displayed within the list of positions registered. A shipping order with the customer's address is printed.

9.1.11   Clear

Cancel all entries which will affect the item registered next (e.g. if you entered a quantity for the next item).

> **Clear** does not cancel items previously registered, but entries made for the item to be registered next (e.g. a barcode, a pre-select quantity, or an item return). Sales functions influencing the whole receipt cannot be cancelled on pressing **[Clear]**.
>
> Note that any transaction needs to be concluded and no items must be registered yet on the current transaction. You must have called a sales function or made an entry for an item.

1) Press **[Clear]** within the **Sales** menu.

All entries made affecting an item registered afterwards will be cancelled. Any position entered into the input field or created within the list of positions registered (e.g. quantities) will be removed.

9.1.12   Order

Register goods ordered through the sales function **Order**.

1) Press **[Order]** in the **Sale** menu.

2) Enter the order number.

Order – Enter order number

3) Confirm your entry through **[OK]**.

The **Transaction** window opens. The goods contained within the order entered will be listed within the list of positions.

4) Press **[Total]** to conclude the transaction.

9.2 The *Control* Menu

The **Control** menu provides functions for controlling purposes (e.g. preventing unauthorised access to the till), as opposed to the functions directly involved in sales and financing tasks.

Operations window − **Control** menu

You will find the following sales functions within the **Control** menu.

No Sale	*Pause*	*Sign Off*
Settlement	*Preliminary Settlement*	*Reconciliation*
EFT Period Close	*Till State Report*	

For detailed information on individual sales functions refer to the corresponding chapters.

9.2.1 No Sale

Employ this sales function if you need to open the till drawer without monetary or goods movement.

NOTICE

Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.

1) Press **[No Sale]** within the **Control** menu.

The **No Sale** window opens.

No Sale window

2)   Select the reason from the list box to the left.

3)   Press **[OK]**.

The **Transaction** window appears and the till drawer opens. Depending on the specific configuration of your system ("Customising"), a receipt labelled "No Sale" will be printed.

> NOTICE
>
> The till drawer must be closed again immediately after you are finished with the task you needed to perform.

9.2.2   Pause

Whenever you need to leave the till unattended for only a short period of time you may call the **Pause** function. It prevents unauthorised access to the till while no operator is present. After calling the function, you will remain signed on to the till, however no entries can be made without entering the correct password.

The **Pause** mode activates automatically if a defined period of time passes without tasks being performed at the till.

> NOTICE
>
> Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.
>
> Only the operator calling the **Pause** sales function will be able to end it with the entry of their password.

1)   Press **[Pause]** within the **Control** menu.

The **Pause** window opens and LUCAS POS will switch into **Pause** mode.

Pause window

This mode does not allow entries being made at the till.

The **Operator** field contains the number of the operator calling the pause mode. This number cannot be altered.

In order to exit the pause mode and resume working the till, the operator who called the pause mode must enter their password under **Password**.

2)   After having entered the password, press **[OK]**.

The **Transaction** window opens. Pause mode is now terminated. You may resume working the till.

9.2.3 Sign Off

After finishing your shift at the till sign off from LUCAS POS to prevent unauthorised access to the till and to allow for another operator to sign on.

NOTICE

> Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.

1) Press **[Sign Off]** within the **Control** menu.

You are signed off from the till. The **Sign On** window opens. Another operator may now sign on entering their operator ID and password.

Sign On window

9.2.4 Settlement

The Settlement function will assist in calculating any cash contained in the till drawer as part of a one-stage settlement (a settlement is usually carried out shortly before closing time).

The data of all monetary value registered is transferred to the back office for further analysis. You are signed off from the till, but may sign on again at any time and continue working the till.

NOTICE

> Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.
>
> If multiple settlements are performed on a single day, the combined value of all settlements is registered in the back office after the daily closing.

1) Press **[Settelement]** within the **Control** menu.

The till drawer opens and the **Settlement** window appears.

Settlement window

2) Select a currency (e.g. **EUR**) from the list box to the left and enter the corresponding cash.

The total of all amounts entered is displayed in the **Total** field to the right.

Settlement window − showing the total and amounts entered under
EUR and **Gift Voucher**

Information

> Any balances of electronic payments (and – depending on your customising – those of payment methods other than cash) do not have to be entered manually as they are submitted automatically.

You may employ the denomination function for the **Settlement** sales function (for further information on denomination fields, please refer to *3.2.2.1 Frequently used Buttons,* paragraph *Denomination and Denomination Fields*). The total amount of all denominations will be registered automatically for the currency selected.

3) Once you have entered all cash contained in the till drawer, press **[OK]**.

LUCAS POS will verify whether the actual holdings within the drawer are compliant with the value from all receipts.

a) If the settlement is verified and therefore the holdings within the drawer equate with the daily receipts, a settlement receipt is printed, showing all payment methods along with the supposed and actual receipts.

The **Settlement** window closes, the operator is signed off, and the **Sign On** window opens. If the operator wishes to continue working the till, they may sign on again (see Chapter *2 Signing On*).

b) If LUCAS POS detects an imbalance between the holdings within the drawer and the daily receipts a warning message appears, informing you of the imbalance.

4) Close the till drawer.

In the case of an imbalance…

NOTICE

> You may not possess the authorisation necessary to execute a settlement regardless of an imbalance. In this case the warning message will only contain the **[Next]** button. On pressing **[Next]** you will be lead to the **Settlement** window again. Correct your entries or sign off to allow for an operator with the authorisation required (e.g. the store manager) to sign on and execute the settlement despite the imbalance.

- Press **[Cancel]** to return to the **Settlement** window, where you can verify and correct your entries.
- Press **[Ignore]** to ignore the warning message and complete the settlement despite the imbalance.

The **Settlement** window closes, the operator is signed off and the **Sign On** window opens.

A settlement receipt is printed, showing the holdings within the drawer compared to the daily receipts along with any imbalance. If an operator wishes to continue working the till, they may sign on again (see *2 Signing On*).

9.2.5   Preliminary Settlement

This function is used to settle the till's actual holdings as a preliminary settlement of a two-stage settlement. All data is sent to the back office for further analysis and the operator is signed off.

NOTICE

> Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.
>
> After calling the **Preliminary Settlement** sales function, you may work the till again only after a manager till settlement has been executed in the back office.

1) Press **[Preliminary Settlement]** within the **Control** menu.

The till drawer opens and the **Preliminary Settlement** window appears.

Preliminary Settlement window

2) Select a currency (e.g. **EUR**) from the list box to the left and enter the corresponding cash.

The total of all amounts entered is displayed under **Total** to the right.

Preliminary Settlement window − amounts entered for **EUR** and **CHF**

Information

> Any balances of electronic payments (and – depending on your customising – those of payment methods other than cash) do not have to be entered manually as they are submitted automatically.

You may employ the denomination function for the **Preliminary Settlement** sales function (for further information on denomination fields, please refer to *3.2.2.1 Frequently used Buttons,* paragraph *Denomination and Denomination Fields*). The total amount of all denominations will be calculated and registered for the currency selected.

3) Once you have entered all cash contained in the till drawer, press **[OK]** to confirm your entries.

LUCAS POS will verify whether the actual holdings in the drawer are compliant with the value from all receipts.

    a) If the settlement is verified and therefore the holdings in the drawer equate with the daily receipts, a settlement receipt is printed showing all payment methods together with the supposed and actual receipts.

The **Settlement** window closes, the operator is signed off, and the **Sign On** window opens. If the operator wishes to continue working the till, they may sign on again.

    b) If LUCAS POS detects an imbalance between the holdings within the drawer and the daily receipts a warning message appears, informing you of the imbalance.

4) Close the till drawer.

In the case of an imbalance…

NOTICE

> You may not possess the authorisation necessary to execute a settlement regardless of an imbalance. In this case the warning message will only contain the **[Next]** button. On pressing **[Next]** you will be lead to the **Settlement** window once again. Correct your entries or sign off to allow for an operator with the authorisation required (e. g. the store manager) to sign on and execute the settlement despite the imbalance.

- Press **[Cancel]** to return to the **Settlement** window, where you can verify and correct your entries.

- Press **[Ignore]** to ignore the warning message and complete the settlement despite the imbalance.

The **Settlement** window closes, the operator is signed off and the **Sign On** window opens.

A settlement receipt is printed showing the holdings within the drawer compared to the daily receipts along with any imbalance. Signing on to the till will only be possible after a manager till settlement has been executed in the back office.

9.2.6 Reconciliation

Compare the actual holdings in the drawer to the total amount of all receipts, e.g. in the event of a customer complaining about not having received the correct amount of change.

1) Press **[Reconciliation]** within the **Control** menu.

The till drawer opens and the **Reconciliation** window appears.

Reconciliation window

2) Select a currency (e.g. **EUR**) from the list box to the left and enter the amount of cash.

The total of all amounts entered is displayed in the **Total** field to the right.
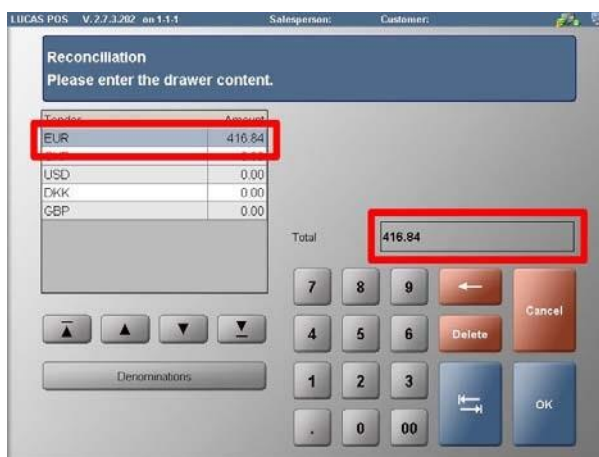
Reconciliation window − amount entered under **EUR** and the total

You may employ the denomination function for the **Settlement** sales function (for further information on denomination fields, please refer to *3.2.2.1 Frequently used Buttons,* paragraph *Denomination and Denomination Fields*). The total amount of all denominations will be calculated and registered automatically for the currency selected.

3) Once you have entered all cash contained in the till drawer, press **[OK]**.

The **Transaction** window opens. A reconciliation receipt is printed stating the holdings within the drawer compared to the official receipts along with any imbalance.

4) Close the till drawer.

9.2.7 EFT Period Close

All current EFT-records will be sent to the head office or to the provider, depending on your customisation.

1) Press **[EFT Period Close]** within the **Control** menu.

All EFT records will be sent to the head office or to the provider.

9.2.8 Till State Report

This function provides you with an overview on any values in your till drawer.

```
           Torex Retail Solutions GmbH
                   Salzufer 8
                 D-10587 Berlin


              TILL STATE REPORT


                      EUR
     Open:                         0.00
     Loan:                         0.00
     Deposit:                 16,577.80
     Pickup:                     -50.00
     Nominal:                 16,527.80
                      USD
     Open:                         0.00
     Loan:                         0.00
     Deposit:                    100.00
     Pickup:                      -0.00
     Nominal:                    100.00
                      GBP
     Open:                         0.00
     Loan:                         0.00
     Deposit:                     50.00
     Pickup:                      -0.00
     Nominal:                     50.00


   STID : 1/2    POS: 1    Op.:    1
   Sales: 7     Date: 13/05/2011  14:52
```

Till State Report

1) Press **[Till State Report]** within the **Control** menu.

The **Transaction** window opens and a receipt is printed.

This receipt displays the current till state. The positions "Open", "Loan", "Deposit", "Pickup" and "Nominal" are listed for each currency.

The store, workstation, operator and receipt number as well as time and date will be stated at the bottom of the receipt.

9.3 The *Financial Accounting* Menu

This menu contains functions used to handle monetary movement, not goods movement.

Financial accounting involves actual payment transactions which influence operating results and will trigger financial accounting actions.

Operations window − the Financial Accounting menu

You will find the following sales functions within the **Financial Accounting** menu.

Funds Receipt	*Cancel Funds Receipt*	*Disbursement*
Cancel Disbursement	*Funds Receipt Position*	*Disbursement Position*

For detailed information on individual sales functions refer to the corresponding chapters.

9.3.1 Funds Receipt

Funds Receipts are payment receipts at the till without goods movement. These incoming amounts may result e.g. from vending machines.

Funds receipts are made in cash.

NOTICE

> Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.
>
> Depending on the reason for the funds receipt, authorisation may be required. If you do not possess the required user rights, refer to someone authorised (e.g. the store manager) to perform the funds receipt.

1) Press **[Funds Receipt]** within the **Financial Accounting** menu.

Information

> You may also enter the amount of cash of the funds receipt into the input field within the **Transaction** window first, then press **[Funds Receipt]** within the **Financial Accounting** menu after that. If you choose to enter the information beforehand, skip the corresponding action step later in the process.

The **Funds Receipt** window opens.

Funds Receipt window

2) Select the reason for the funds receipt from the list box to the left.

3) Enter the cash into the **Amount** field.

• You may enter a comment into the **Comment** field.

If your till is not equipped with a keyboard use the *virtual keyboard* after pressing .

4) Press **[OK]**.

The **Transaction** window appears and the till drawer opens. The **Funds Receipt** is registered and a receipt is printed.

5) Place the cash into the till drawer and close the till drawer.

9.3.2 Cancel Funds Receipt

Cancel a previously made funds receipt as follows.

NOTICE

> Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.
>
> Depending on the reason for the cancellation of the funds receipt, authorisation may be required. If you do not possess the required user rights, refer to someone authorised (e.g. the store manager) to perform the cancellation of the funds receipt.

1) Press **[Cancel Funds Receipt]** within the **Financial Accounting** menu.

Information

> You may also enter the amount of the cash of the funds receipt to be cancelled into the input field within the **Transaction** window first, then press **[Cancel Funds Receipt]** within the **Financial Accounting** menu after that. If you choose to enter the information beforehand, skip the corresponding action step later in the process.

The **Cancel Funds Receipt** window opens.

2) Select the reason for the cancellation of the funds receipt from the list box to the left.

3) Enter the cash you will redeem from the cancellation into the **Amount** field.

• You may enter a comment into the **Comment** field.

If your till is not equipped with a keyboard use the *virtual keyboard* after pressing .

4) Press **[OK]**.

5) The **Transaction** window appears and the till drawer opens.

6) Redeem the cash resulting from the cancellation and close the till drawer.

A receipt is printed.

9.3.3   Disbursement

Disbursements are payouts without goods movement. These may include meal allowances for staff members or compensations to a customer.

Disbursements are made in cash.

<table>
<tr><td>NOTICE</td><td>Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.

Depending on the reason for the disbursement, authorisation may be required. If you do not possess the required user rights, refer to someone authorised (e.g. the store manager) to perform the disbursement.</td></tr>
</table>

You can process a disbursement in two different ways.

1) Press **[Disbursement]** within the **Financial Accounting** menu.

The **Disbursement** window opens.
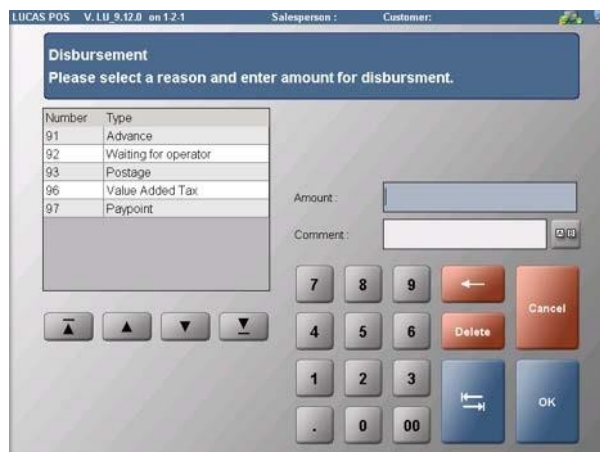
Disbursement window

2) Select the reason for the disbursement from the list box to the left.

3) Enter the cash of the disbursement into the **Amount** field.

● You may enter a comment into the **Comment** field.

If your till is not equipped with a keyboard use the *virtual keyboard* after pressing 🅰🅱 .

4) Press **[OK]**.

The **Transaction** window appears and the till drawer opens. The disbursement is registered and a receipt is printed.

5) Remove the cash from the till drawer and close the till drawer again.

9.3.4   Cancel Disbursement

Cancel a previously made disbursement as follows.

<table>
<tr><td>NOTICE</td><td>Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.</td></tr>
</table>

> Depending on the reason for the cancellation of the disbursement, authorisation may be required. If you do not possess the required user rights, refer to someone authorised (e.g. the store manager) to perform the cancellation of the disbursement.

1) Press **[Cancel Disbursement]** within the **Financial Accounting** menu.

Information

> You may also enter the amount of the cash of the disbursement to be cancelled into the input field within the **Transaction** window first, then press **[Cancel Disbursement]** within the **Financial Accounting** menu after that. If you choose to enter the information beforehand, skip the corresponding action step later in the process.

The **Cancel Disbursement** window opens.

Cancel Disbursement window

2) Select the reason for the cancellation of the disbursement from the list box to the left.

3) Enter the cash into the **Amount** field.

- You may add a comment into the **Comment** field. It will be printed on the receipt.

If your till is not equipped with a keyboard use the *virtual keyboard* after pressing .

4) Press **[OK]**.

The **Transaction** window appears and the till drawer opens.

5) Place the cash into the till drawer and close the till drawer after that.

A receipt is printed.

9.3.5   Funds Receipt Position

If you need to make several funds receipts you may perform them in one transaction. You may also register a funds receipt in the course of a regular sales transaction. This is particularly useful e.g. if your company is raising funds for a good cause and a customer agrees to participate with a donation which will be added to their regular purchase.

1) Press **[Funds Receipt]** within the **Financial Accounting** menu.

Information

> You may also enter the amount of the cash of the **Funds Receipt Position** into the input field within the **Transaction** window first, then press **[Funds Receipt Position]** within the **Financial Accounting** menu after that. If you choose to enter the information beforehand, skip the corresponding action step later in the process.

2) The **Funds Receipt** window opens.

Funds Receipt window

3) Select the reason for the funds receipt position from the list box to the left.

4) Enter the amount of the funds receipt position into the **Amount** field.

- You may enter a comment into the **Comment** field.

If your till is not equipped with a keyboard use the *virtual keyboard* after pressing [AB].
The **Transaction** window opens.

- You may register any items a customer wishes to purchase.

5) Press **[Total]**.

The **Financing** window appears.

6) Choose a payment method and conclude the transaction.

9.3.6   Disbursement Position

Use this function e.g. to refund money to a staff member who bought goods for the company on their own expenses. This disbursement can be made using any means of payment.

1) Press **[Disbursement Position]** within the **Financial Accounting** menu.

Information

> You may also enter the amount of the **Disbursement Position** into the input field within the **Transaction** window first, then press **[Funds Receipt]** within the **Financial Accounting** menu after that. If you choose to enter the information beforehand, skip the corresponding action step later in the process.

The **Disbursement** window opens.
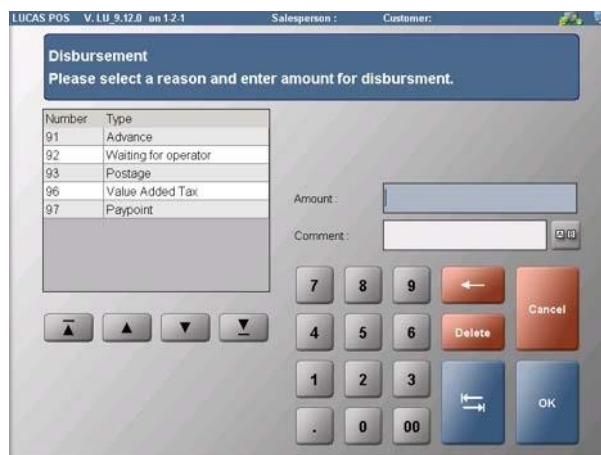
Disbursement window

2) Select a reason for the disbursement position from the list box to the left.

3) Enter the amount of the disbursement position into the **Amount** field.

- You may add a comment into the **Comment** field.

If your till is not equipped with a keyboard use the *virtual keyboard* after pressing [AB].
The **Transaction** window opens.

- You may register any items a customer may wish to purchase.

4) Press **[Total]**.

If there are no additional items registered the transaction's total will be stating a negative amount.

   a) Select a payment method, refund the monetary value and conclude the transaction.

If additional items have been registered on the receipt the transaction's total may be stating a positive amount (depending on the value of the disbursement position and that of any additional items registered).

   b) Select a payment method, finance the receipt, and conclude the transaction.

9.4 The *Tender Control* Menu

Tender control operations involve the movement of tender between different locations in the retail outlet (e.g. the till and the store safe) and external locations (e.g. the bank). Tender control operations have no impact on the operating result and do not trigger any financial accounting actions.

The sales functions in the **Tender Control** menu allow you to post the payment movements affecting the till directly at the till.

Operations window − Tender Control menu

You will find the following sales functions within the **Tender Control** menu.

Till Loan	*Till Pickup*	*Rebook Tender*

For detailed information on individual sales functions refer to the corresponding chapters.

9.4.1 Till Loan

A till loan is registered and a defined amount of cash is added to the till drawer to provide sufficient change.

Till loans are executed in cash.

NOTICE

> Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.

1) Press **[Till Loan]** within the **Tender Control** menu.

The **Till Loan** window appears and the till drawer opens.

Till Loan window

2) Place any cash into the till drawer.

3) Select a currency (e.g. **EUR**) from the list box to the left and enter the amount placed into the till drawer.

The total of all entered amounts is displayed to the right under **Total**. The list box to the left is displaying the currencies with all cash entered.
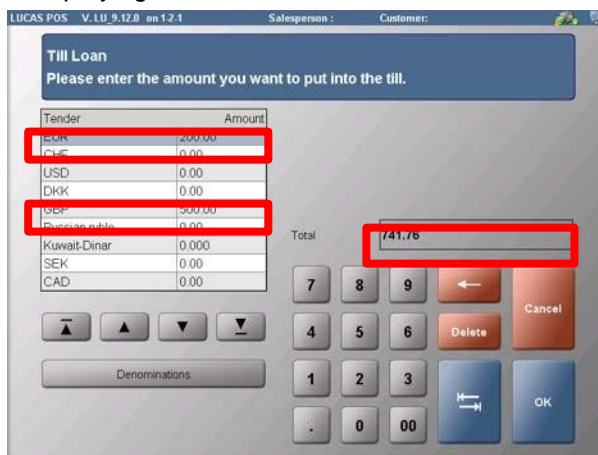
Till Loan window − showing cash entered

You may employ the denomination function for the **Till Loan** sales function (for further information on denomination fields, please refer to *3.2.2.1 Frequently used Buttons,* paragraph *Denomination and Denomination Fields*). The total amount of all denominations will be calculated and registered automatically for the currency selected.

4) Once you have entered all cash press **[OK]** to confirm your entries.

The **Transaction** window opens. A receipt is printed stating all cash placed into the till drawer.

5) Close the till drawer again.

9.4.2 Till Pickup

A till pickup is registered and a defined amount of cash is taken from the till drawer and transferred e.g. to the store's safe or the bank.

> **NOTICE** Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.

1) Press **[Till Pickup]** within the **Tender Control** menu.
2) The **Till Pickup** window appears and the till drawer opens.

Till Pickup window

3) Take the cash desired from the till drawer.
4) Select a currency (e.g. **EUR**) from the list box to the left and enter the amount taken from the till drawer.

You may employ the denomination function for the **Till Pickup** sales function (for further information on denomination fields, please refer to *3.2.2.1 Frequently used Buttons, paragraph Denomination and Denomination Fields*). The total amount of all denominations will be calculated and registered automatically for the currency selected.

5) Once you have entered all cash press **[OK]** to confirm your entries.

The **Transaction** window opens. A receipt on the till pickup is printed, stating all cash entered.

If the amount for one currency entered exceeds its defined limit, a warning message will be displayed.

- Press **[Cancel]** to return to the **Till Pickup** window and correct your entries.
- Press **[Ignore]** to ignore the message and complete the safe drop despite the imbalance.

6) Close the till drawer again.

9.4.3 Rebook Tender

Rebook a payment method which has been booked incorrectly.

> **NOTICE** Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.

1) Press **[Rebook Tender]** within the **Tender Control** menu.

The **Rebook Tender − Incorrectly Booked Tender** window opens.
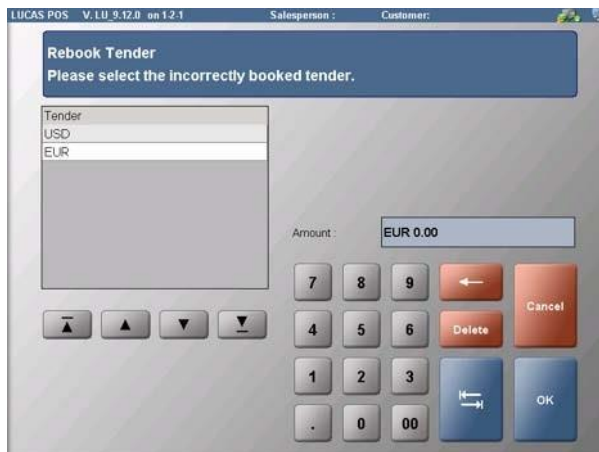
Rebook Tender window

2) Select the currency booked incorrectly from the list box to the left.

3) Enter the amount you have booked incorrectly into the **Amount** field.

4) Press **[OK]** to confirm your entries.

The **Rebook Tender − New Tender** window opens.
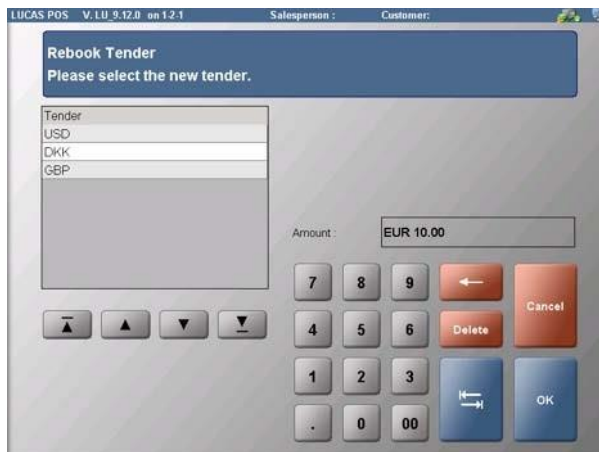
Rebook Tender − New Tender window

5) Select the currency the booking will be converted into.

6) Press **[OK]**.

The **Transaction** window opens.

The payment method is rebooked and a receipt on the booking is printed.

9.5 The *Service* Menu

The Service menu provides the operator with sales functions used to display particular information or for general service purposes. No goods or monetary movements occur when executing service functions.

Operations window − **Service** menu

You will find the following sales functions within the **Service** menu.

The Print Functions Submenu	*The Workforce Submenu*	*Gift Receipt*
Delivery Receipt	*Training/ Stop Training*	*Turnover Report*
Exchange Rates	*Show M&M Promotions*	*EFT Management*
Currency Converter	*Info Receipt*	*E-Journal*
Remove Pos		

For detailed information on individual sales functions refer to the corresponding chapters.

9.5.1 The *Print Functions* Submenu

Print Functions allow for printing duplicates of all receipts in the store you are working at.

Operations window − **Print Functions** submenu

You will find the following sales functions within the **Print Functions** submenu (**Service** menu).

Reprint Receipt   *Reprint Last Receipt*

For detailed information on individual sales functions refer to the corresponding chapters.

Reprint Receipt

Print a duplicate of a receipt created in the same store.

NOTICE

Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.

A duplicate can only be produced if the original receipt was created in the same store. Duplicates of cancelled or aborted transactions cannot be printed.

1) Press **[Reprint Receipt]** within the **Print Functions** submenu (**Service** menu).

Reprint Receipt window

2) Scan the barcode of the receipt you would like to duplicate.

Information	You may also enter the information required manually and press **[OK]** after. Ensure that all information is entered correctly. If the receipt's number is not available to you, you may execute a *transaction search*, see *3.2.2.1 Frequently used Buttons*.

The **Transaction** window opens. A duplicate of the receipt is printed, labelled "Duplicate".

Reprint Last Receipt

Duplicate the previously printed receipt.

NOTICE	Note that any transaction needs to be concluded and no items must be registered yet on the current transaction. Duplicates of cancelled or aborted transactions cannot be printed.

1) Press **[Reprint Last Receipt]** within the **Print Functions** submenu (**Service** menu).

The **Transaction** window opens and the previously printed receipt is duplicated, labelled "Duplicate".

9.5.2 The *Workforce* Submenu

The **Workforce** submenu contains sales functions for planning and controlling the deployment of your staff.

Operations window − **Workforce** submenu

You will find the following sales functions within the **Workforce** submenu.

Time Recording

For detailed information on individual sales functions refer to the corresponding chapters.

Time Recording

Time Recording is used to log working hours in an internal time recording system, which may also transfer any logged hours to an external time recording system.

NOTICE

> This sales function will only be available in combination with Micros Workforce Management.
>
> Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.

1) Press **[Time Recording]** within the **Workforce** submenu (**Service** menu).

The **Time Recording** window opens.

Time Recording window

2) Enter your employee number into the **Employee** field.

3) Enter your operator number into the **Operator** field.

4) Depending on whether you are starting or exiting time recording:

a) press **[Punch In]** to start your shift.

Working hours will be logged from this point on. The **Transaction** window opens.

b) press **[Punch Out]** to end your shift.

The current time is logging the ending of working hours. The **Transaction** window opens.

9.5.3 Gift Receipt

All items or just particular ones from a previously printed receipt may be printed as a gift receipt.

The receipt will only show item details without any prices stated. The customer may enclose the receipt in a present for warranty purposes without the recipient learning about the price.

The gift receipt has the same receipt number as the original receipt.

> **NOTICE**
>
> Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.
>
> Gift receipts may only be printed in the store the original receipt has been created at.

1) Press **[Gift Receipt]** within the **Service** menu.

The **Gift Receipt** window opens.

Gift Receipt window

Information on the company and store are displayed by default and cannot be changed.

2) Ensure that the fields **Business Day** and **Workstation** contain the correct information for the gift receipt.

3) Scan the receipt's barcode or manually enter the receipt's number into the **Receipt Number** field.

> **Information**
>
> If the receipt's number is not available to you, you may execute a *transaction search*, see *3.2.2.1 Frequently used Buttons*.

4) If you entered the information manually, press **[OK]**.

The **Gift Receipt − Item Selection** window opens.
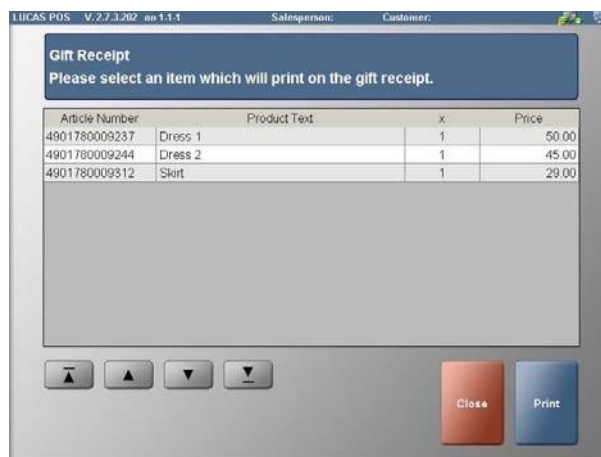
Gift Receipt − Item Selection window

All items registered on the receipt are displayed here.

5) Select an item to be stated on the gift receipt.

The item will be highlighted in colour.

Article Number	Product Text	x	Price
4901780009237	Dress 1	1	50.00
4901780009244	Dress 2	1	45.00
4901780009312	Skirt	1	29.00

Gift Receipt − Item Selection window with the selected position

- You may select additional items.

These will be highlighted in colour.

- If you would like to cancel a selection, select the relevant item again.

The selection is cancelled and the item is no longer highlighted in colour.

Information	If several identical items have been registered as one position, all items contained in this position will be registered on the gift receipt.

6) Once you have selected all items to be printed as a gift receipt, press **[Print]**.

The gift receipt is printed. The **Gift Receipt − Item Selection** window remains open for additional gift receipts to be printed. The items already selected appear greyed out and can no longer be selected for an additional gift receipt.

- You may select additional items from the receipt to print as gift receipts.

7) Press **[Close]** to exit the **Gift Receipt − Item Selection** window.

The **Transaction** window opens.

9.5.4 Delivery Receipt

Compose a delivery order from a previously financed transaction in order to send all or particular items to the address stated.

The delivery order will be registered under the same number as the original receipt.

NOTICE	Note that any transaction needs to be concluded and no items must be registered yet on the current transaction. A deliver order may only be printed in the store the original receipt was created at.

1) Press **[Delivery Receipt]** within the **Service** menu.

The **Delivery** window opens.

Delivery window

Information on the store ID is displayed by default under **Store** and cannot be changed.

2) Ensure that **Business Day** and **Workstation** contain the correct information (the business day on which the receipt was created, and the number of the till at which the receipt was created). Correct the entries if necessary.

3) Scan the receipt's barcode or enter the receipt's number into the **Receipt** field.

Information

If the receipt's number is not available to you, you may execute a *transaction search*, see *3.2.2.1 Frequently used Buttons*.

4) If you have entered the receipt's number manually, press **[OK]**.

The **Delivery − Delivery Address** window opens.

Delivery − Delivery Address window

5) Enter the recipient's name and address.

If your till is not equipped with a keyboard use the *virtual keyboard* after pressing .

6) Enter the date of the current business day into the **Date** field (DD/MM/YY).

7) Once you have entered all details, press **[OK]**.

The **Delivery − Item Selection** window opens.
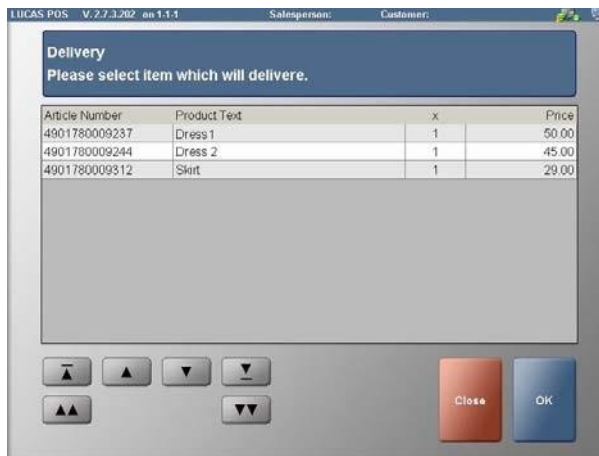
Delivery − Item Selection window

All items registered on the particular receipt are displayed in the list box.

8) Select an item chosen for delivery.

The selected item is highlighted in colour.

Article Number	Product Text	x	Price
4901780009237	Dress 1	1	50.00
4901780009244	Dress 2	1	45.00
4901780009312	Skirt	1	29.00

Delivery − Item Selection window with selected position

- You may now select additional items from the list box.
- If you need to cancel a selection, select the item again.

The selection is cancelled and the item is no longer highlighted in colour.

Information

If several identical items have been registered as one position, all items contained in this position will be registered on the delivery order if selected.

9) Once you have selected all items for the delivery order, press **[OK]**.

The delivery order is printed in duplicate – one for the customer and one for the records.

The **Delivery − Delivery Address** window remains open for additional delivery orders to be printed, containing the information previously entered.

Delivery − Delivery Address window

a) Press **[OK]** to create another delivery order.

The **Delivery − Item Selection** window opens. You may now select additional items for another delivery order.

Items already selected for a previous delivery order are greyed out and cannot be selected.

    b)   If you would like to send another delivery to a different address, change the information displayed within the **Delivery − Item Selection** window and press **[OK]**.

The **Delivery − Item Selection** window reopens. Select additional items and print a new delivery order if required.

9.5.5 Training

The training mode is a real life simulation and lets an operator new to LUCAS POS get familiar with all processes and functions without any monetary or goods movement involved.

NOTICE

> Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.
>
> An operator needs to be authorised in order to being able to call the training mode.
>
> Call the **Stop Training** function to exit training mode (see *9.5.6 Stop Training*).

1) Press **[Training]** within the **Service** menu.

The till is switching into training mode. The header appears red and the user interface displays the labelling **Training**. Monetary or goods movements executed in this mode will not affect the store's turnover balance.

Transaction window in training mode

NOTICE

> Note that you cannot sign off from LUCAS POS while in training mode. To sign off, exit training mode first.
>
> Transactions and receipts created in training mode will be numbered consecutively, starting from the last receipt printed before training mode has been called.
>
> Any receipt created in training mode will be labeled "Training".

9.5.6 Stop Training

Use this function to exit the training mode.

NOTICE

> The training mode has to be called in order to call **Stop Training**.
>
> Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.

1) Press **[Stop Training]** within the **Service** menu.

Training mode will be exited. The labelling **Training** is no longer displayed and all monetary and goods movements will affect the store's turnover.

9.5.7 Turnover Report

This function displays the daily turnover for the till and store up to the point of having called the function.

1) Press **[Turnover Report]** within the **Service** menu.

The **Turnover Report** window opens.

Turnover Report window

Each line displays the **POS Turnover** as well as the **Store Turnover** generated within each period (Time From and Time To).

The line **Total Turnover** displays the daily turnover up till that point for the till and store.

2) Press **[Back]** to close the **Turnover Report**.

The **Transaction** window opens.

9.5.8 Exchange Rates

LUCAS POS can display exchange rates for all currencies supported. This is helpful e.g. if a foreign customer asks for the current exchange rate to convert their spending.

1) Press **[Exchange Rates]** within the **Service** menu.

The **Display Exchange Rates** window opens.

The local currency used as a reference for converting foreign currencies appears under **Key currency**.

| Foreign Currency | Key currency converted into foreign currency | Exchange rate when buying | Exchange rate when selling |

Display Exchange Rates window

2) Press **[OK]** to close the **Display Exchange Rates** window.

The **Transaction** window opens.

9.5.9 Show M&M Promotions

Have available Mix&Match promotions displayed directly at the till. All promotions currently active are displayed or - depending on your configuration - all current and future promotions, future promotions only, or expired promotions only are displayed.

1) Press **[Show M&M Promotions]** within the **Service** menu.

The **Loaded Mix&Match Promotions** window opens.
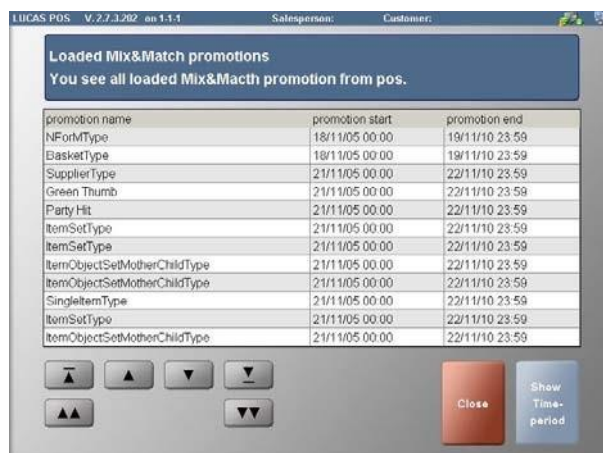
Loaded Mix&Match Promotions window

All Mix&Match promotions are displayed according to your configuration (loaded and currently active promotions by default) along with the promotion names, date and time of the promotion's start and of the promotion's ending

NOTICE

> Depending on your customisation a list box with all available promotion types will be displayed after calling the **Show M&M Promotions** function, e. g. current promotions, expired promotions, etc.). Select the promotion type you would like to have displayed and press **[Show Promotions]**.
>
> The Loaded Mix&Match Promotions window opens and displays all promotions of the selected type.

2) Select a promotion.

3) If you have selected a select a promotion with one or more defined time periods the **[Show Timeperiod]** button is displayed.
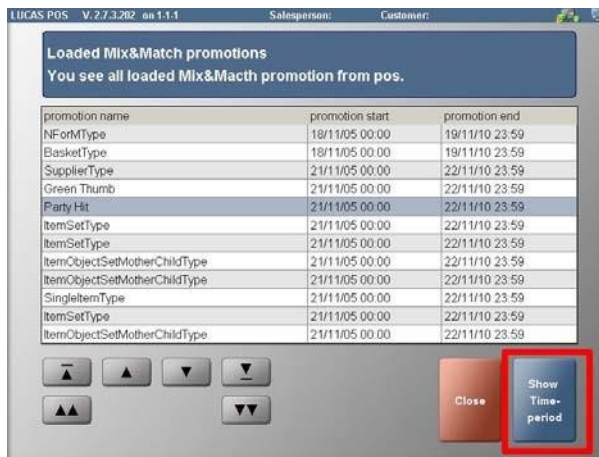
Loaded Mix&Match Promotions window with active
[Show Timeperiod] button

4) Press **[Show Timeperiod]** to display all time periods during which the selected promotion is active.

The **Promotions details** window opens.
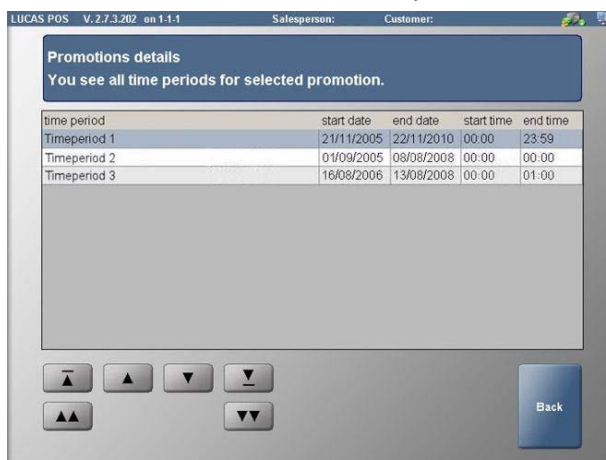
Promotions details window

All time periods (previous as well as future periods) in which the selected Mix&Match promotion is active are displayed.

5) Press **[Back]** to close the **Promotions details** window.

The **Loaded Mix&Match Promotions** window opens again.

6) Press **[Close]** to close the **Loaded Mix&Match Promotions** window.

The **Transaction** window opens again.

9.5.10   EFT Management

EFT Management displays all functions available in your EFT device. Which functions are available will depend on your provider.

1) Press **[EFT Management]** within the **Service** menu.

An information message will be displayed. Wait for the message to disappear.

The **EFT Management** window appears.

EFT administration window

2) Select the option with which you want to proceed.

9.5.11 Currency Converter

Convert one currency into another.

1) Press **[Currency Converter]** within the **Service** menu.

The **Currency Converter** window opens.

Currency Converter window

2) Select the base currency and the desired currency from the drop down menus to the left.

EUR will be displayed as base currency by default in the **Convert from** field.

3) Enter the amount to be converted in the **Amount** field.

4) Press **[Convert]**.

Currency Converter window

The **Currency Converter** window will now display the result of the conversion as well as the current exchange rate.

- You may convert more currencies now.

5) Press **[Close]** to close the window.

The **Transaction** window opens.

9.5.12 Info Receipt

Print an informational receipt to check for the following information.

- Name of Software used
- Software version

- Calibrated modules

- Scale Calibration Checksum (valid for all devices which require calibration, e.g. scales)

1) Press **[Info Receipt]** within the **Service** menu.


```
          Torex Retail Solutions GmbH
                   Salzufer 8
                  D-10587 Berlin


                 information slip


software:                         XPOS
version:                      LU_9.12.0
calibrated module:              EM-XPOS
scale calibration checksum:        n/a


STID : 1/2    POS: 1    Op.:    ---
Sales: ---    Date: 19/05/2011 10:39
```
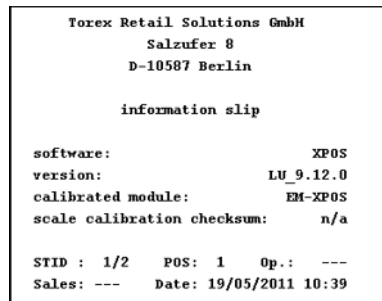
Info receipt

The Info receipt is printed, the POS it was created at is identifiable from the receipt. At the bottom of the receipt you will find information on the store, till, operator (if applicable), date, and time.

9.5.13 E-Journal

View a list of all transactions made during the current period. General sales transactions will be displayed as well as sign on and sign off processes and other transactions. You may search the **E-Journal** for specific positions.

1) Press **[E-Journal]** within the **Service** menu.

The **E-Journal - Overview** window opens.
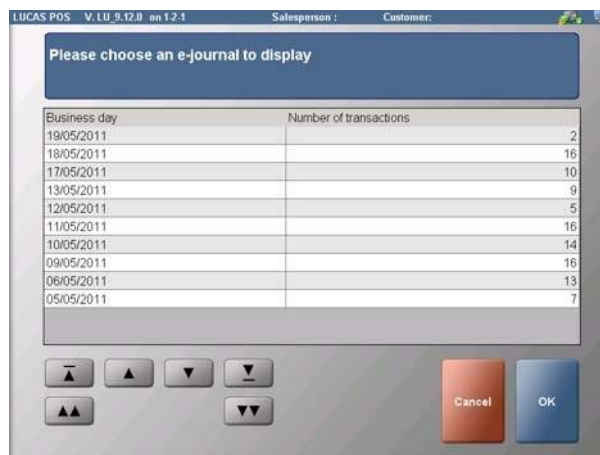
E-Journal - Overview window

2) Select the particular business day from the list box to view all transactions made.

3) Press **[OK]**.

The **E-Journal** window opens.
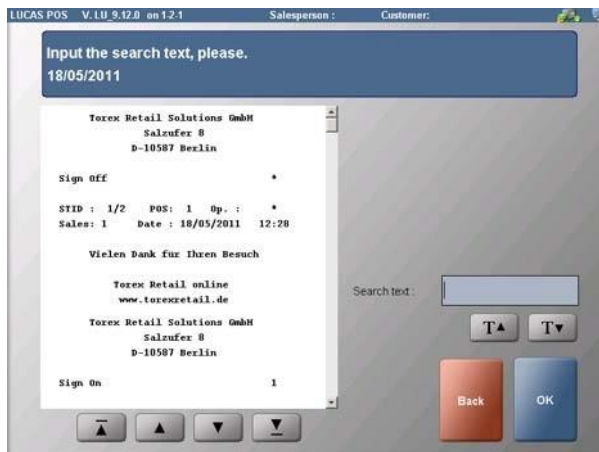
E-Journal window

4) Enter a keyword into the **Search text** input field.

If your till is not equipped with a keyboard use the *virtual keyboard* after pressing ⬚⬚.

5) Use ⬚ and ⬚ to search all available transactions for the keyword entered.

Any matches will be highlighted in colour.

- Search for further positions.

6) Press **[Back]** to end search.

The **E-Journal – Overview** window opens.

    a) Select another business day to search for transactions, or

    b) Exit the **E-Journal** on pressing **[Cancel]**.

9.5.14 Remove POS

Remove a POS from the corporate structure.

NOTICE	The particular POS needs to be settled before removal to prevent data loss.

NOTICE	**Removal of back office is not possible through this function!** When executing this function from the particular till a connection between back office and till needs to be established. You need to be authorised to remove a POS from the corporate structure.

1) Press **[Remove POS]** within the **Service** menu.

The **Remove POS** window opens.

2) Press **[OK]** to remove POS from the corporate structure.

3) The **Transaction** window opens. The POS can now be removed.

NOTICE	Unplug the POS from the mains after removal and make sure it is deactivated within the (C)SMS otherwise undeliverable requests to the POS may cause congestion.

9.5.15　Messages

You may send messages from the head office to all POS systems within the company. Whenever new messages are available they will be displayed after the operator signed in on a POS.

1)　Sign in on the POS System.

If there is a new message available, it will be displayed immediately after sign on.
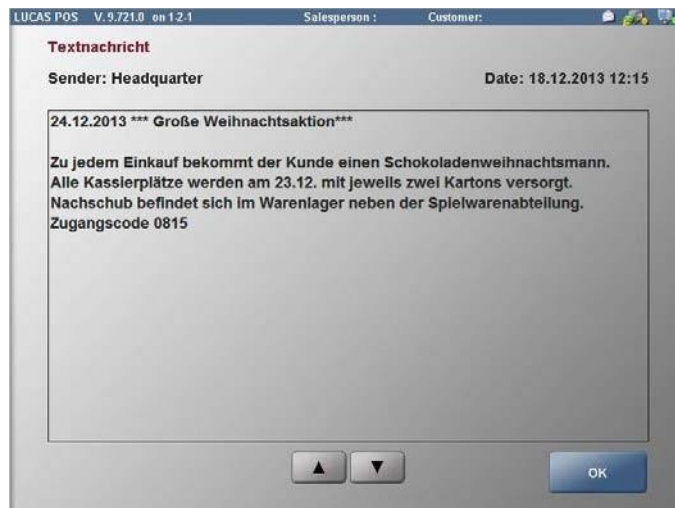
Messages

2)　Press **[OK]**.

You will be signed on to the system.

9.5.16　Password Change

The operator may change their password right at the POS system while the particular operator is signed on.

1)　Press **[Password change]** within the **Service** menu.

The Change Password window opens.

Change Password window

Your operator number will be displayed.

2) Enter old password.

3) Enter new password.

4) Re-enter new password.

Your password has been changed. You will be directed to the transaction window.

9.5.17 Article Info

You may display all information available on a particular item.

1) Press **[Article info]** within the **Service** menu

The **Item Search** window opens.

Item search window

2) Enter an item ID.

The **Article Information** window opens.

Article information window

Any information available on this item will be displayed.

Press **[OK]** to return to the **Transactions** window.

9.6 The *Customer* Menu

The **Customer** menu contains all sales functions available to maintain the customer database directly from the till and to assign sales transactions to customers.

Operations window − **Customer** menu

You will find the following sales functions within the **Customer** menu.

Customer View	*New Customer*	*Modify Customer*
Customer Purchase	*Deselect Customer*	*Customer Gift Certificate*

For detailed information on individual sales functions refer to the corresponding chapters.

NOTICE

In order to employ some functions contained in the **Customer** menu a central customer database has to be established and LUCAS POS needs to have access to the head office's Transaction Pool (T-Pool) containing your company's entire transaction data.

9.6.1 Customer View

This function allows you to display a customer's information stored in the customer database. Use this function, e.g. to see whether a customer's profile is still up-to-date.

Information

This function only allows for viewing customer details, not for changing it.

1) Press **[Customer View]** within the **Customer** menu.

The **Customer View − Customer Data** window opens.

Customer View − Customer Data window

Here, you may search for customer data to be displayed.

2) Enter information on the customer into at least one of the input fields.

Information

Use the asterisk key as a placeholder for any character strings.

If your till is not equipped with a keyboard use the *virtual keyboard* after pressing.

3) Press **[Search]** to initiate the customer search.

The **Customer View – Customer Selection** window appears.

Customer View − Customer Selection window

All customers found based on the search criteria entered are displayed along with their corresponding customer ID's in a list box.

- On selecting an entry the customer's address and phone number are displayed to the right.

4) Select a customer and press **[View]** to view the information available.

The **Customer Information** window opens.

Customer Information window

All available customer information is displayed.

- Press **[Details]** to display the workplace address and additional addresses of the customer (if available).

- Press **[Purchase History]** to display all previous purchases made by this customer.

- Press **[Gift Voucher]** to display all vouchers issued to this customer. You may check for the customer whether they still have unredeemed vouchers.

- Press **[Back]** to return to the window **Customer View − Customer Selection** to initiate a new search.

9.6.2 New Customer

Add a new customer to the customer database. An individual customer ID is assigned to the new customer. They will be able to enjoy certain privileges such as customer discounts or special promotions.

NOTICE

> Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.

1) Press **[New Customer]** within the **Customer** menu.

The **New Customer − Main Data** window opens.

New Customer – Main Data window

2) Enter the main customer's information into the input fields.

<table>
<tr><td>NOTICE</td><td>In order to add a new customer to the database you need to enter the customer's last name. All further entries are optional.</td></tr>
</table>

Title	Title (e.g. Mr, Ms, Dr)
First Name	Customer's first name
Middle Initial	The first letter of the customer's middle name (if applicable)
Last Name	Customer's last name
Position	Customer's job position (e.g. employee, manager)
Discount info	Information on any discounts assigned to the customer
Birthday	Customer's birthday (DD/MM/YYYY)
Anniversary	Day of a particular anniversary (DD/MM/YYYY)

If your till is not equipped with a keyboard use the *virtual keyboard* after pressing ⌨. Additionally, you may activate the following check boxes.

Phone Desired	The customer wishes to receive information etc. by phone. In this case, the customer's phone number needs to be stored in the database.
Mail Desired	The customer wishes to receive information etc. by mail. In this case, the customer's postal address needs to be stored in the database.
Corporate Customer	The customer is a corporate customer.
Email Desired	The customer wishes to receive information etc. via e-mail. In this case, the customer's e-mail address needs to be stored in the database.

<table>
<tr><td>Information</td><td>You may enter further information into the input fields available. All information stored will be displayed.</td></tr>
</table>

Change or add:

- The customer's home address on pressing **[Home Address]**.
- The customer's workplace address on pressing **[Working Address]**.
- An additional address on pressing **[Additional Address]**.
- The customer's assignment to a specific group on pressing **[Group]**.

New Customer – Group window

    a)   Select a group from the drop down menu.

3)   Press **[OK]** once you have entered all information available.

The **Transaction** window opens. The customer details entered are stored in the customer database along with an individual customer ID.

9.6.3   Modify Customer

Modify or complete a customer's information in the database.

NOTICE | Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.

1)   Press **[Modify Customer]** within the **Customer** menu.

The **Modify Customer − Customer Data** window opens.

Modify Customer − Customer Data window

Here, you may search the database for the specific customer.

2)   Enter information on the customer into at least one of the input fields.

If your till is not equipped with a keyboard use the *virtual keyboard* after pressing 🄰🄱.

3) Press **[Search]** to initiate the customer search.

The **Modify Customer – Customer Selection** window opens.
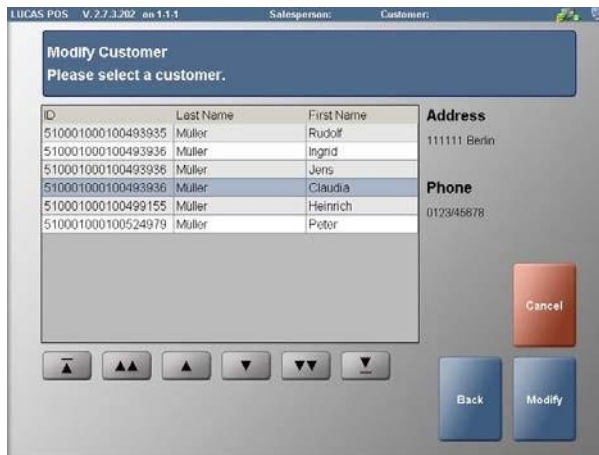
Modify Customer − Customer Selection window

All customers found based on the search criteria entered are displayed along with their corresponding customer ID's in a list box.

4) Select a customer and press **[Modify]** to view, change or add information.

On selecting an entry the customer's address and phone number are displayed to the right.

The **Modify Customer − Main Data** window opens.
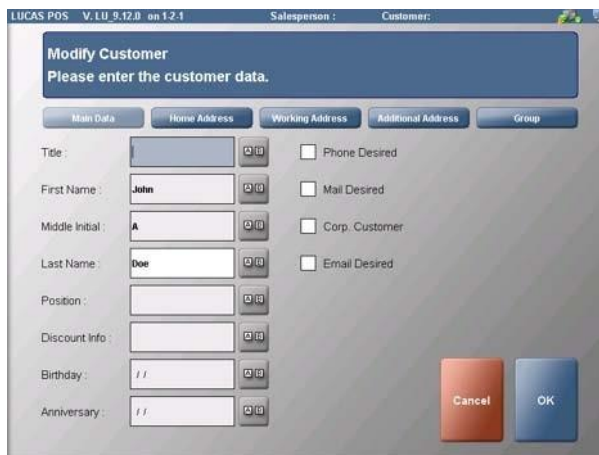
Modify Customer − Main Data window

The customer's main information is displayed.

5) You may now modify or − if not yet entered − complete any information displayed.

Title	Title (e.g. Mr, Ms, Dr)
First Name	Customer's first name
Middle Initial	The first letter of the customer's middle name (if applicable)
Last Name	Customer's last name
Position	Customer's job position (e.g. employee, manager)
Discount info	Information on any discounts assigned to the customer
Birthday	Customer's birthday (DD/MM/YYYY)
Anniversary	Day of a particular anniversary (DD/MM/YYYY)

If your till is not equipped with a keyboard use the *virtual keyboard* after pressing [AB].
Additionally, you may activate the following check boxes.

Phone Desired	The customer wishes to receive information etc. by phone. In this case, the customer's phone number needs to be stored in the database.
Mail Desired	The customer wishes to receive information etc. by mail. In this case, the customer's postal address needs to be stored in the database.
Corporate Customer	The customer is a corporate customer.
Email Desired	The customer wishes to receive information etc. via e-mail. In this case, the customer's e-mail address needs to be stored in the database.

Information

> You may enter further information into the input fields available. All information saved will be displayed.

Change or add:

- The customer's home address on pressing **[Home Address]**.
- The customer's workplace address on pressing **[Working Address]**.
- An additional address on pressing **[Additional Address]**.
- The customer's assignment to a specific group on pressing **[Group]**.

Modify Customer – Group window

6) Press **[OK]** once you have entered or changed all information available.

The **Transaction** window opens. The customer information entered or changed is stored in the customer database.

9.6.4   Customer Purchase

Assign a receipt to a specific customer and save all transaction details in the corresponding customer account.

NOTICE

> Note that a customer will only be assigned to the current transaction until this transaction is concluded. The following transactions will not be assigned to them.
>
> To remove a customer from the current transaction call the **Deselect Customer** function.

1) Press **[Customer Purchase]** within the **Customer** menu.
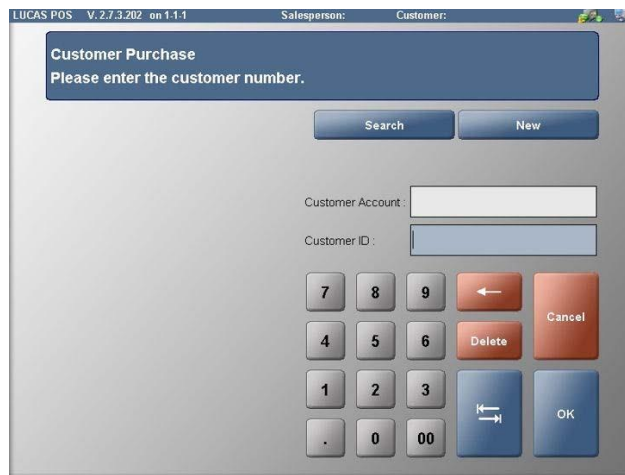
The **Customer Purchase** window opens.

Customer Purchase window

You may either enter the customer's ID or account, search the customer database for the particular customer, or create a new customer profile within the customer database.

The customer exists within the database.

1) Scan the customer card. You may enter the information manually into the input fields and press **[OK]**.

2) If the customer does not know their account number or customer ID, you can search for the customer (in this case, follow the steps described under *Customer Search* (see *below*)).

The **Transaction** window opens. The customer ID is displayed in the header and all positions registered on the receipt are assigned to the customer.

Transaction window − customer ID

The customer does not yet exist in the database.

1) Press **[New]**.

The **New Customer − Main Data** window opens.

New Customer − Main Data window

2) Enter at least the customer's last name to create a new customer profile.

• Enter other customer details (optional, see *9.6.2 New Customer*).

3) Press **[OK]** once you have entered all information available.

The customer profile is created and the **Transaction** window opens. The customer ID is displayed in the header and all positions registered on the receipt are assigned to the customer.

Customer Search

If the customer already exists in the customer database but does not know their account number or customer ID, you may search for this information.

1) Press **[Search]** in the Customer Purchase window.

The **Search Customer − Customer Data** window appears.

Search Customer − Customer Data window

This window allows for searching the customer database for a particular customer.

2)   Enter information on the customer into at least one of the input fields.

Use the asterisk key as a placeholder for any character strings.

If your till is not equipped with a keyboard use the *virtual keyboard* after pressing ⌨.

3)   Press **[Search]** to initiate the customer search.

The **Search Customer − Customer Selection** window opens.

Search Customer − Customer Selection window

All customers found based on the search criteria entered are displayed along with their corresponding customer ID's in a list box.

On selecting an entry the customer's address and phone number are displayed to the right.

4)   Press **[OK]** to select the customer who wishes to make a customer purchase.

The **Transaction** window opens. The customer ID is displayed in the header and all positions registered on the receipt are assigned to the customer.

Transaction window − customer ID

> **NOTICE**
> Note that a customer can only be assigned to the current transaction. The following transactions will not be assigned to them. Call the **Deselect Customer** function to remove a customer from the current transaction.

9.6.5 Deselect Customer

If you have assigned the current transaction to a customer by calling the **Customer Purchase** function, you can call the **Deselect Customer** function to cancel it.

> **NOTICE**
> A customer needs to be assigned to the current transaction in order to call the **Deselect Customer** function.

1) Press **[Deselect Customer]** within the **Customer** menu.

The customer purchase is cancelled. Items already registered and all subsequently registered items are no longer assigned to a customer.

9.6.6 Customer Gift Certificate

If the current transaction has been assigned to a specific customer, all unredeemed vouchers stored for this customer are displayed after calling the **Customer Gift Certificate** function. This way a customer may be informed about any unredeemed gift certificates which may also be refunded.

> **NOTICE**
> In order to execute the **Customer Gift Certificate** function you need to have called the **Customer Purchase** function through the customer search, not by entering the customer ID or their account information.

> **NOTICE**
> For refunding gift certificates which require validation a connection must be established between the gift certificate server and the till.
>
> - If the connection is not established an information message is displaying a code and your head office's phone number. Dial the number and state the code. The employee will be able to determine whether or not the voucher has been redeemed. If the voucher has not been redeemed yet you will be given a code to enable voucher return.
> - Alternatively, a warning message might be displayed requesting your permission to

> proceed returning the voucher despite of the missing connection. Be aware that if you choose to return the voucher despite the missing connection there will always be a risk involved since there will not be any validation from the gift certificate server.

2) Press **[Customer Gift Certificate]** within the **Customer** menu.

The **Available Gift Certificates** window opens.
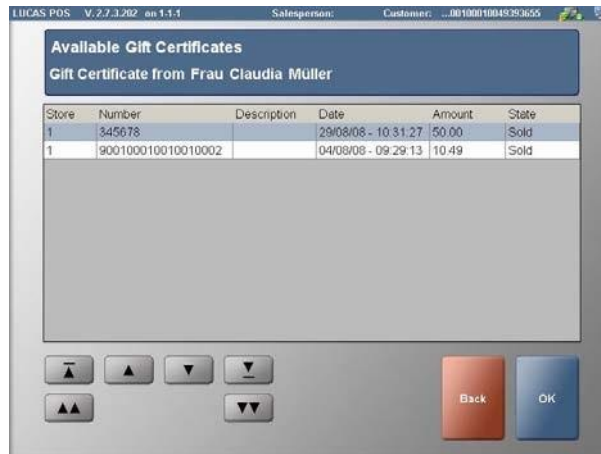
Available Gift Certificates window

Any unredeemed vouchers of the customer stored in the customer database are displayed including the following information.

Store	Store the voucher was created
Number	Voucher number
Description	Voucher type, e.g. Gift Voucher or Bonus Voucher
Date	Date, the voucher was created
Amount	The voucher's value
State	Status of the voucher **sold**: The voucher has not yet been redeemed and can be returned.

- If the customer would like to return one of the vouchers, select the voucher and press **[OK]**.

The **Transaction** window opens. The voucher is returned, the voucher's value is transferred as a negative amount to the list of positions registered and deducted from the total amount. The voucher's value is paid to the customer or is offset against the current transaction if the customer is making a purchase.

NOTICE

> If a connection to the gift certificate server could not be established and an authorisation through the head office is not available the **Voucher Return** window opens. Enter the voucher's information and press **[OK]** to return the voucher.

- If the customer would not like to return a voucher press **[Back]**.

The **Transaction** window opens without a voucher being returned.

9.6.7 Invoice Settlement

A customer may settle a previously issued invoice at the store.

1) Press **[Invoice Settlement]** in the **Customer** menu.

The **Invoice Settlement** window opens.

Invoice Settlement window

2) Enter the required information (**Company**, **Store**, **Workstation**).

3) Press **[OK]**.

The Transaction window opens. The invoice may now be financed.

9.6.8   Account Pay In

Registered customers may transfer money onto or withdraw it from their customer accounts.

Information	This function does not work if items are already registered. Please finance transaction and register an account pay in within a new transaction.

1) Press **[Account Pay In]** in the **Customer** menu.

The **Customer Purchase** window opens.

Customer Purchase window

2) Scan customer card or enter information manually.

The **Customer Pay In** window opens.
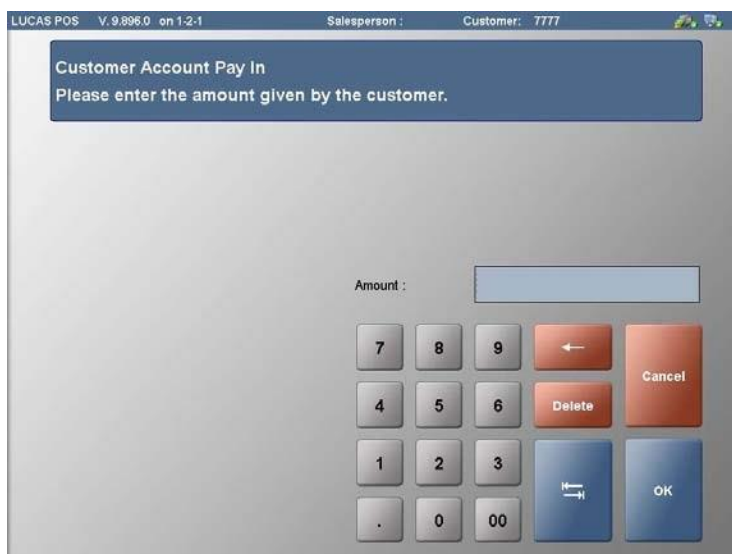
Customer Pay In window

3) Enter the amount the customer likes to pay into their account and press **[OK]**.

4) Finance transaction as any other transaction.

The amount paid in is transferred to the customer's account.

9.6.9 Account Pay Out

Registered Customers may transfer money onto or withdraw it from their customer accounts.

Information

This function does not work if items are already registered. Please finance transaction and register an account pay in within a new transaction.

1) Press **[Account Pay Out]** in the **Customer** menu.

The **Customer Purchase** window opens.

Customer purchase window

2) Scan customer card or enter information manually.

The **Customer Pay Out** window opens.

Customer Pay Out window

3) Enter the amount the customer would like to withdraw and press **[OK]**.

The **Financing** window opens.

3) Press **[Change]** and hand the amount to the customer.

The amount will be deducted from the customer's account.

9.7 The *VAT* Menu

The VAT menu offers possibilities to print tax free or Global Blue receipts as well as receipts with the VAT stated separately. Certain customer groups may be eligible for a VAT refund when Global Blues do not apply. This may be the case e.g. in foreign military stationed within your country.

Operations window – **VAT** menu

9.7.1 The *VAT Refund* Submenu

The VAT Refund is a special sales function designed to refund VAT to eligible customers. This may be the case e.g. in stores located on the grounds of a foreign military base in your country. The VAT can then be refunded without having to leave the country as is the case in Global Blue.

NOTICE

> **A VAT Refund is not the same as a Global Blue!**
>
> In the case of a Global Blue the VAT is only refunded to the customer when leaving the country to prevent fraudulent use. Enquire on any legal requirements before refunding VAT through the **VAT Refund** function instead of the **Global Blue**.

The range of buttons displayed within the **VAT Refund** submenu depends on the tax rates defined within your company or branch. In the case of Germany, the tax rates available are 7% and 19%, therefore the buttons will be displaying **7%** and **19%**.

The VAT can be refunded after a transaction has been concluded.

1) Press the button corresponding to the specific tax rate within the **VAT Refund** sub-menu (**VAT** menu).

The **VAT Refund** window opens.

VAT Refund window

2) Enter the amount into the **Total amount** field and press **[OK]**.

The VAT Refund will be displayed within the list of positions registered.

Transactions window

- You may register additional positions.
3) Press **[Total]** to initiate financing.
4) Select the payment method desired for the refund and conclude the transaction.

The refund will be paid to the customer.

9.7.2   Tax Free Receipt

A duplicate of a transaction already concluded is printed and attached to a tax free receipt.
A foreign customer may claim taxes paid for goods purchased abroad.

NOTICE

> Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.
>
> You may only create duplicates of regular sales receipts of transactions concluded, not including cancelled receipts.
>
> A duplicate for a tax free receipt can only be printed in the same store the original receipt has been created.

1) Press **[Tax Free Receipt]** within the **VAT** menu.

The **Tax Free Receipt** window opens.

Tax Free Receipt window

2) Scan the barcode of the receipt you would like to duplicate.

Information ▸▸▸

> You may also enter the information required manually and press **[OK]** after. Ensure that all information is entered correctly. If the receipt's number is not available to you, you may execute a *transaction search*, see *3.2.2.1 Frequently used Buttons*.

The system displays an information message requesting the tax free slip to be attached to the receipt.

3) Confirm the information message with **[OK]**.

The **Transaction** window opens. A duplicate of the receipt is printed, labelled "attachment to the tax free receipt" and can now be attached to the tax free receipt.

9.7.3 Show VAT Receipt

Print a duplicate of a transaction already concluded. This states the amount of the VAT in a separate line.

NOTICE ▸▸▸

> Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.
>
> You may only create duplicates of regular sales receipts of transactions concluded, not including cancelled receipts.
>
> A duplicate for a tax free receipt can only be printed in the same store the original receipt has been created.

Print a VAT Receipt as described in the following.

1) Press **[Show VAT Receipt]** within the **VAT** menu.

The **Show VAT Receipt** window opens.

Show VAT Receipt window

2) Scan the barcode of the receipt you would like to duplicate.

Information You may also enter the information required manually and press **[OK]** after. Ensure that all information is entered correctly. If the receipt's number is not available to you, you may execute a *transaction search*, see *3.2.2.1 Frequently used Buttons*.

The **Transaction** window opens. A duplicate of the receipt is printed. This duplicate states the VAT separately.

9.7.4 Global Blue TFS

Global Blue is employed whenever a customer is eligible for tax free shopping, e.g. when a tourist from another country purchases goods that are eligible for a global blue transaction. With the receipt issued, the customer can claim taxes on departure (e.g. at the air- port).

Information A transaction has to be registered and financed in order to issue a global blue receipt.

A minimum value must be met.

1) Press **[Global Blue TFS]** within the **VAT** menu.

If more than one type of receipt is configured within your system, you will be prompted to select your preferred type of receipt (e.g. PDF, regular receipt, etc.)

2) The **Global Blue Receipt** window opens.
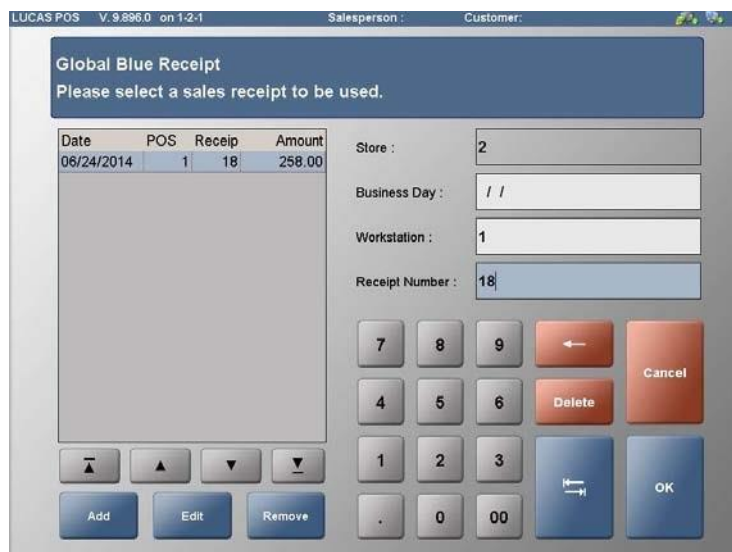
Global blue receipt window

3) Enter required information (**business day**, **workstation**, **receipt number**).

The store ID is entered by default.

4) Press **[OK]**.

The **Global Blue Customer Receipt – Customer Data** window opens.

Global Blue Customer Receipt – Customer Data window

There are several ways of identification.

Information

> ISO or Global Blue Card, Passport and Mobile Number require previous registration with Global Blue. If the customer is not registered with any of these tokens with global blue, a global blue receipt may be issued as described further below.

5) Identification may be done by:

   a) Global Blue Card (**[ISO or Global Blue Card]**),

   b) Passport (**[Passport]**, nationality and passport number required), or

   c) Mobile number (**[Mobile Number]**, mobile number required).

After selecting any of the options above, **the Global Blue Receipt – Identity Check** window opens

Global Blue Receipt window – Identity check

6) By pressing **[Yes]** the operator verifies that they have identified the customer. The Global Blue Receipt is printed.

7) If the customer is not registered with Global Blue, his information may either be

   a) Entered manually into the system after pressing **[Enter Customer Data]**, or

   b) Written onto the receipt after it is printed without any information, on pressing **[Print without customer data]**.

A receipt will be printed. Any information required must be filled out on the receipt, or else it may become invalid.

9.7.5   Void Global Blue Cheque

Void a previously issued Global Blue Receipt as follows.

1) Scan Global Blue receipt or press **[Void Global Blue Cheque]** within the VAT menu and enter the Global Blue receipt ID.

An information window opens.
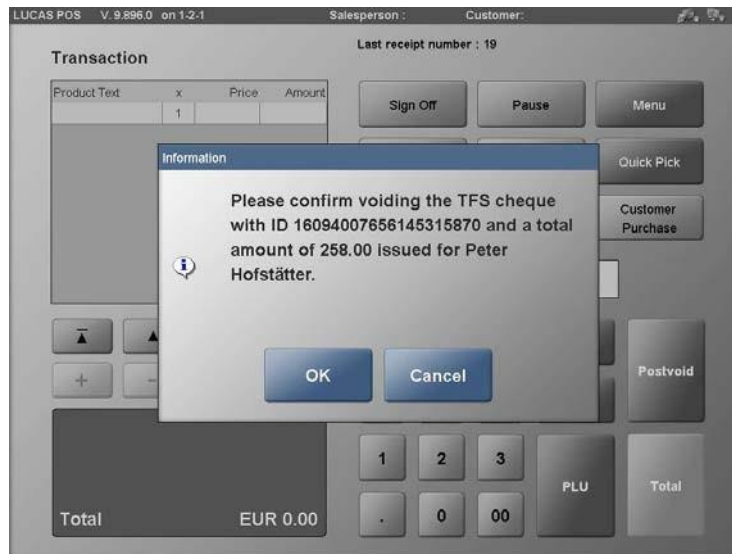
Information window

2) Press **[OK]**.

A receipt is printed. Keep original Global Blue receipt with confirmation of void.

9.7.6   Duty Free

All items registered will be registered without the corresponding VAT value.

NOTICE

Once called, the **Duty Free** function cannot be undone. If you have called the **Duty Free** function by accident, you need to cancel the entire receipt.

1) Press **[Duty Free]** within the **VAT** menu.

All items registered after are registered without their VAT value.
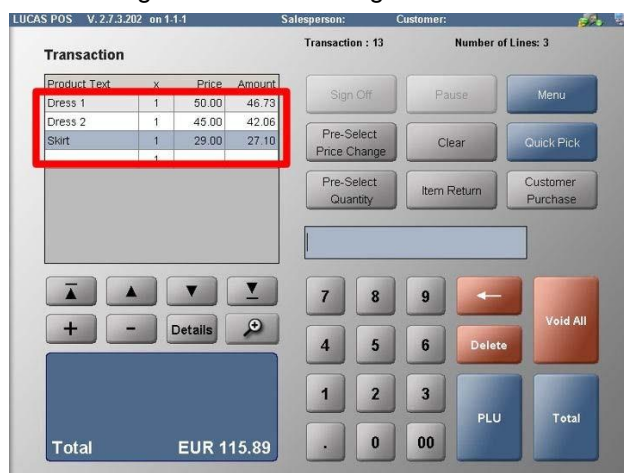
Transaction window

9.8   The *Giftcard* Menu

A gift card may be used similar to a prepaid card which is charged in advance and then used as a payment method.

The **Giftcard** menu contains all sales functions needed to sell, recharge and void a gift card or to display the actual balance.

Operations window − **Giftcard** menu

You will find the following sales functions within the **Giftcard** menu.

Activate GC (Gift Card)   *Balance GC (Gift Card)*   *Reload GC (Gift Card)*

Cashout GC (Gift Card)

For detailed information on individual sales functions refer to the corresponding chapters.

NOTICE

> A connection between your till and the gift card server needs to be established in order to execute gift card functions. If a connection could not be established, gift card functions may be not or only partially available after authorisation by phone. This is depending on the customisation of your LUCAS POS.

9.8.1   Activate GC (Gift Card)

This function allows you to sell a gift card. It is recharged with an amount, registered as a position, and then handed over to the customer after financing the transaction.

1) Press **[Activate GC]** within the **Gift Card** menu.

The **Gift Card Activation** window opens.

Gift Card Activation window

2) Scan the gift card. Alternatively, swipe it through a card-reading device or enter the information manually.

3) Enter the desired value of the gift card.

Information

The gift card can be recharged with a particular value at any time. Gift cards may also be returned and cashed out.

4) Press **[OK]** to confirm your entries.

The gift card is activated and the value entered is charged to the card. The **Transaction** window opens. The card's value is added to the list of positions registered.

The **Transaction** window with amount for a new gift card

Information

In the case of the transaction being cancelled the gift card will not be recharged with any amount.

5) Hand over the gift card to the customer after financing.

9.8.2 Balance GC (Gift Card)

Using this function you will be able to let a customer know about the current balance on their gift card.

The gift card must be at hand or the gift card number must be available.

1) Press **[Balance GC]** within the **Gift Card** menu.

The **Gift Card Balance Enquiry − Gift Card Data** window opens.

Gift Card Balance Enquiry − Gift Card Data window

2) Scan the customer's gift card. Alternatively, swipe it through a card-reading device or enter the information manually.

3) Press **[OK]** to confirm your entries.

The **Gift Card Balance Enquiry − Display Balance** window opens.

Gift Card Balance Enquiry − Display Balance window

4) Press **[Close]** to return to the **Transaction** window.

9.8.3   Reload GC (Gift Card)

Gift cards can be recharged in order to increase an existing balance.

NOTICE

The gift card must be at hand or the gift card number must be available.

1)   Press **[Reload GC]** within the **Gift Card** menu.

The **Increase giftcard balance** window opens.
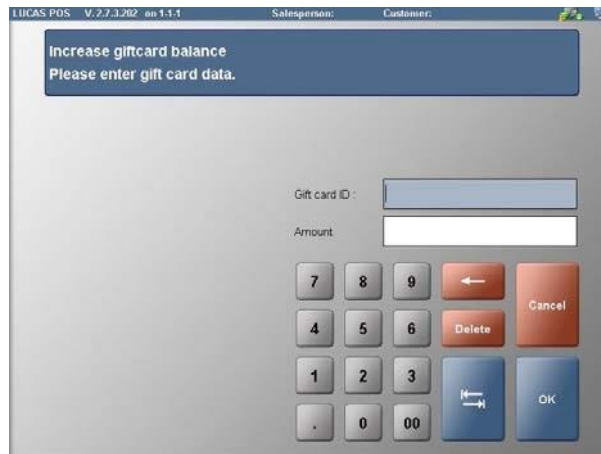
Increase giftcard balance window

2)   Scan the customer's gift card. Alternatively, swipe it through a card-reading device or enter the information manually.

3)   Enter the value which will be transferred onto the gift card.

Information

The gift card can be recharged with a particular value at any time. Gift cards may also be returned and cashed out.

4)   Press **[OK]** to confirm your entries.

The **Transaction** window opens. The gift card is recharged with the amount entered, and the amount appears as a position within the list of positions registered and is financed with the current transaction.

Information

In the case of the transaction being cancelled the gift card will not be recharged with any amount.

9.8.4 Cashout GC (Gift Card)

This function allows for the gift card to be terminated and for all remaining value to be paid to the gift card holder.

The gift card must be at hand or the gift card number must be available.

1) Press **[Cashout GC]** within the **Gift Card** menu.

The **Giftcard cashout** window opens.

Giftcard cashout window

2) Scan the customer's gift card. Alternatively, swipe it through a card-reading device or enter the information manually.

3) Press **[OK]** to confirm your entries.

The **Transaction** window opens. The gift card is terminated and the gift card's value is registered as a negative amount within the list of positions registered. Register any items the customer may wish to purchase or pay the remaining amount to the customer.

In the case of the transaction being cancelled the gift card will not be cashed out.

9.9 The *Stock Control* Menu

The **Stock Control** menu contains sales functions used to book all goods inwards and goods outwards to the inventory, which means that they do not necessarily have to be scheduled at the head office or in the back office.

If goods inwards or goods outwards were scheduled by the head office, they can be checked against the delivery documents and may also be corrected if necessary. This ensures your store's inventory is kept up-to-date.

Information

Any transaction data is exported as XML files, which are used for data exchange between LUCAS POS and the stock control system.

Refer to the XML transaction files to learn about any changes in the inventory (see LUCAS XML Interface Export documentation, Chapter 3.6 Item Movement Transactions).

Operations window − **Stock Control** menu

You will find the following sales functions within the **Stock Control** menu.

Transfer In	*Transfer Out*	*Scheduled Transfer In*
Scheduled Transfer Out	*(O) Stock Return*	*(O) Withdrawal*
Reservation	*Prolong Reservation*	*Terminate Reservation*
Reservation Number	*Collect missing Items*	*Reverse missing Items*
Withdrawal	*Withdrawal Return*	*Depot Return Item*
Cancel DC Return		

For detailed information on individual sales functions refer to the corresponding chapters.

9.9.1　Transfer In

Book goods inwards transactions which have not been scheduled by the head office or back office and for which no goods-receipt file is available (e.g. when receiving goods from another store without the head office being involved).

NOTICE :::
> Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.

1) Press **[Transfer In]** within the **Stock Control** menu.

The **Goods In** window opens.

Goods In window

2) Enter the delivery order (D/O) number into the **Doc. ID** field.

3) Press **[OK]** to confirm your entry.

The **Stocktaking** window opens.

Stocktaking window

4) Scan the item's barcode to book any items to the inventory, or enter the item number/barcodes manually and press **[PLU]** (see *4.1 Registering Items*).

Use the functions **Pre-Select Quantity** (see *9.1.4 Pre-Select Quantity*) and **Post-Select Quantity** (see *9.1.5 Post-Select Quantity*) to register several identical items at a time.

NOTICE :::
> Note that items booked to the inventory cannot be cancelled or duplicated afterwards.
> If you have entered the incorrect quantity, use **Post-Select Quantity** and enter "0" as a

> quantity to reverse the booking or cancel the entire booking on pressing **[Void All]**.

Any items registered are displayed with their item numbers and quantities in the list of positions registered.

Stocktaking window showing the items registered

5)   Once all goods received have been registered, press **[OK]**.

The **Transaction** window opens and a goods inwards receipt is printed.

All goods have been booked to the inventory. Any changes will be sent to the head office and, if settings are accordingly, to the stock control system.

9.9.2   Transfer Out

Book goods outwards transactions which have not been scheduled by the head office or back office and for which no goods-receipt file is available (e.g. when shipping goods to another store without the head office being involved).

NOTICE

> Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.

1)   Press **[Transfer Out]** within the **Stock Control** menu.

The **Target Store** window opens.

Target Store window

The **Doc. ID** field already contains an automatically generated delivery document number for the goods outwards transaction.

2) Select the destination store from the list box to the left.

3) Press **[OK]** to confirm your selection.

The **Stocktaking** window opens.

The **Stocktaking** window

4) Scan the items' barcode to book any items to the goods outwards, or enter the item number/barcodes manually and press **[PLU]** (see *4.1 Registering Items*).

Use the functions **Pre-Select Quantity** (see *9.1.4 Pre-Select Quantity*) and **Post-Select Quantity** (see *9.1.5 Post-Select Quantity*) to register several identical items at a time.

NOTICE

Note that any items booked cannot be cancelled or dublicated afterwards.

If you have entered an incorrect quantity, use the **Post-Select Quantity** function and enter "0" as a quantity to reverse the booking or cancel the entire booking on pressing **[Void All]**.

The items booked are displayed with their item numbers and quantities in the list of positions registered.

Stocktaking window showing the items registered

5) Once all outgoing goods have been booked, press **[OK]**.

The **Transaction** window opens and a goods outwards receipt is printed. The stock control system is updated.

9.9.3 Scheduled Transfer In

If a goods inwards transaction was scheduled at the head office, a goods-receipt file is sent to the destined store and will be available at the POS.

Use the **Scheduled Transfer In** function to check for any pending goods-receipt files. Compare the documents with the goods received and, if necessary, make corrections. This ensures that your store's inventory is kept up-to-date.

NOTICE

> Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.
>
> A goods-receipt file needs to be available at the store to execute this function.

1) Press **[Scheduled Transfer In]** within the **Stock Control** menu.

The **Scheduled Deliveries** window opens.
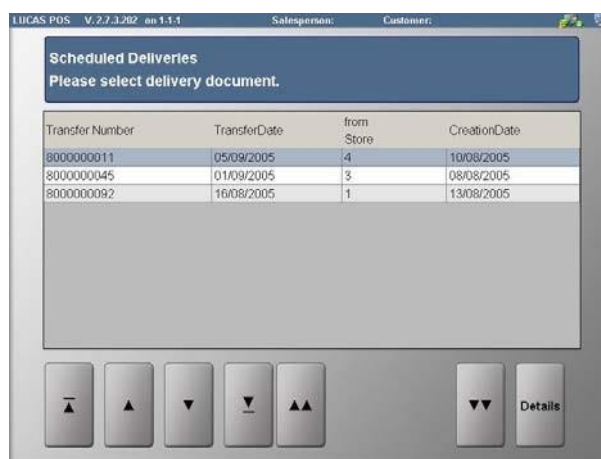
Scheduled Deliveries window

All scheduled goods inwards transactions contained in the goods-receipt file are displayed.

Transfer Number	Delivery order number of the goods delivered
Transfer Date	Date of the goods' delivery
from Store	Store, from which the goods are shipped
Creation Date	Date of scheduling the goods inwards transaction

2) Select the goods inwards transaction corresponding to the goods delivered.

3) Press **[Details]**.

The **Details** window opens. All items from the selected goods inwards transaction are displayed.

Details window

  a) If the transaction displayed does not match the delivery order of the goods delivered, press **[Back]**.

The **Scheduled Deliveries** window opens. Select another transaction from the list.

  b) If the transaction displayed matches the delivery order of the goods delivered, press **[Goods in]** to confirm your selection.

The **Stocktaking** window opens.

Stocktaking window

All items contained in the delivery order for this goods inwards transaction are displayed in the list of positions registered along with their item numbers and quantities.

4) Check the items listed on the delivery order against the items delivered.

If you need to correct any positions you will have the following options.

- If an item delivered does not appear on the delivery order, scan the item's barcode or enter the item number/barcode into the input field manually and press **[PLU]**.

The item is registered and appears in the list of positions registered.

  a) If you would like to add multiple identical items to the list, use the functions **Pre-Select Quantity** (see *9.1.4 Pre-Select Quantity*) and **Post-Select Quantity** (see *9.1.5 Post-Select Quantity*).

- If the quantity of a specific item delivered differs from the quantity specified in the delivery order use the function **Post-Select Quantity** (see *9.1.5 Post-Select Quantity*).

- If an item on the list was not delivered use the function **Post-Select Quantity** (see *9.1.5 Post-Select Quantity*) to enter the quantity "0" for this item.

5) Once the delivery order matches the goods delivered, press **[OK]**.

The **Transaction** window opens and a receipt on the scheduled delivery is printed.

Any changes will be sent to the head office and, if settings are accordingly, to the stock control system.

> **NOTICE**
>
> Note that delivery orders which have already been closed can no longer be displayed and changed using the **Scheduled Transfer In** function.

9.9.4 Scheduled Transfer Out

If a goods outwards transaction was scheduled at the head office, a goods-despatched file is sent to the consigning store and will be available at the POS.

Use the **Scheduled Transfer Out** function to check for any pending goods-despatched files. Compare the documents with the goods to be despatched, if necessary, make corrections. This ensures that your store's inventory is kept up-to-date.

> **NOTICE**
>
> Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.
>
> A goods-despatched file needs to be available at the store to execute this function.

1) Press **[Scheduled Transfer Out]** within the **Stock Control** menu.

The **Scheduled Transfers** window opens.
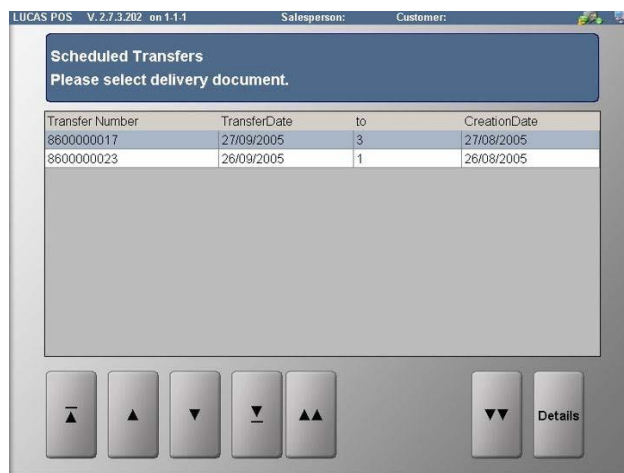
Scheduled Transfers window

All scheduled goods outwards transactions contained in the goods-despatched file are displayed.

Transfer Number	Despatch order number of the goods despatched
Transfer Date	Date of the goods' despatch
to	Destination for the despatched goods
Creation Date	Date of scheduling the goods outwards transaction

2) Select the goods outwards transaction you would like to check and correct any information if necessary.

3) Press **[Details]**.

The **Details** window opens. All items from the selected goods outwards transaction are displayed.
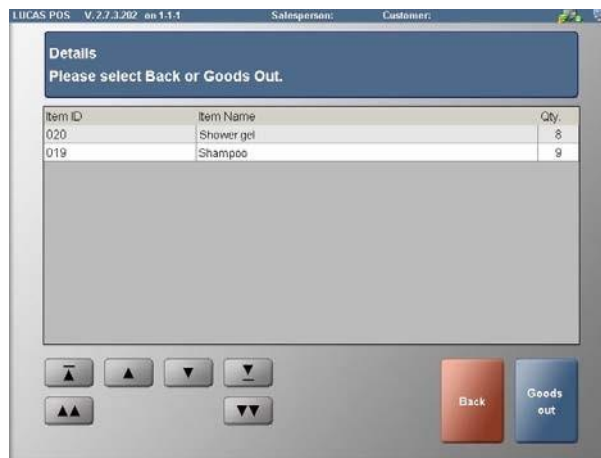
Details window

    a)   If the transaction displayed does not match the despatch order of the goods despatched, press **[Back]**.

The **Scheduled Transfers** window opens. Select another transaction from the list.

    b)   If the transaction displayed matches the despatch order of the goods despatched, press **[Goods out]** to confirm your selection.

The **Stocktaking** window opens.

Stocktaking window

All items contained in the despatch order for this goods outwards transaction are displayed in the list of positions registered along with their item numbers and quantities.

4)   Check the items listed on the despatch order against the items despatched.

If you need to correct any positions you will have the following options.

- If an item despatched does not appear on the despatch order, scan the item's barcode or enter the item number/barcode into the input field manually and press **[PLU]**.

The item is registered and appears in the list of positions registered.

    a)   If you would like to add multiple identical items to the list, use the functions **Pre-Select Quantity** (see *9.1.4 Pre-Select Quantity*) and **Post-Select Quantity** (see *9.1.5 Post-Select Quantity*).

- If the quantity of a specific item despatched differs from the quantity specified in the despatch order use the function **Post-Select Quantity** (see *9.1.5 Post-Select Quantity*).

- If an item on the list was not despatched use the function **Post-Select Quantity** (see *9.1.5 Post-Select Quantity*) to enter the quantity "0" for this item.

5) Once the despatch order matches the goods despatched, press **[OK]**.

The **Transaction** window opens and a receipt on the scheduled transfer is printed.

Any changes will be sent to the head office and, if settings are accordingly, to the stock control system.

NOTICE	Note that delivery orders which have already been closed can no longer be displayed and changed using the **Scheduled Transfer In** function.

9.9.5 (O) Stock Return

Employ this sales function if damages have been discovered in goods delivered to your store.

Information	The local store will have to be imported as target store before executing this function.

1) Press **[(O) Stock Return]** within the **Stock Control** menu.

The **stockreturn** window opens.

Stockreturn window

The delivery document ID and the number of items registered will be displayed in the lower left. The deliver document ID will be generated automatically for each stock return.

- You may use the **Pre-Select Quantity** sales function to register several of the same items.

2) Register the particular item.

3) The **stockreturn reason** window opens.

Stockreturn reason window

4) Select the reason for the stock return from the list box and confirm through **[OK]**.

The **stockreturn** window opens.

The item will be listed within the list of positions registered.

- You may register more items.

Press **[OK]** to conclude the stock return process.

The **Transactions** window opens. A receipt will be printed. The executing operator as well as the store manager will have to sign the receipt.

Information

> Refer to *9.9.16 Cancel DC Return* to cancel a stock return.

9.9.6 (O) Withdrawal

A withdrawal must be executed whenever an item is used for purposes other than sales (i.e. window decorations).

Information

> The local store will have to be imported as target store before executing this function.

1) Press **[(O) Withdrawal]** within the **Stock Control** menu.

The **withdrawal** window opens.

withdrawal window

The delivery document ID and the number of items registered will be displayed in the lower left. The deliver document ID will be generated automatically for each stock return.

- You may use the **Pre-Select Quantity** sales function to register several of the same items.

2) Register the particular item.

3) The **withdrawal reason** window opens.

4) Select the reason for the stock return from the list box and confirm through **[OK]**.

The **withdrawal** window opens.

The item will be listed within the list of positions registered.

- You may register more items.

Press **[OK]** to conclude the withdrawal process.

The **Transactions** window opens. A receipt will be printed. The executing operator as well as the store manager will have to sign the receipt.

Information ⋯ | Refer to *9.9.14 Withdrawal Return* to cancel any withdrawals executed.

9.9.7 Reservation

If a customer would like to reserve goods at your till you may create a reservation on these goods. Depending on the type of reservation, one or more items may be registered in one reservation.

Information ⋯ | Only **Collective Reservations** allow for several items to be registered in one reservation.

1) Press **[Reservation]** within the **Stock Control** menu.

The **Reservation** window opens.

Reservation window

2) Select the reservation type from the list box to the left.
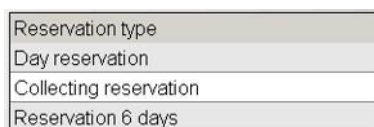
Reservation window – list box reservation types

Depending on the reservation type selected the expiration date may be set by default.

3) Enter the number you would like to assign to this reservation.

4) Enter the expiration date if not set by default.

5) Press **[OK]**.

The **Transaction** window opens.

6) Register one or several items to be assigned to this reservation and press **[OK]**.

A receipt on the reservation created will be printed. Inform the customer on the duration of their reservation.

9.9.8 Prolong Reservation

Depending on the reservation type an existing reservation may be extended.

1) Press **[Prolong Reservation]** within the **Stock Control** menu.

The **Prolong Reservation** window opens.

Prolong Reservation window

2) Enter the customer's reservation number, as well as the expiration date.

Information

Depending on the reservation type it may not be possible to extend a reservation. In this case you will be informed about this in an information message.

The new expiration date will be limited to a particular amount of days. If the selected expiration date lies beyond this time frame you will be asked to select another date within a time frame displayed in an information message.

3) If all entries are correct, press **[OK]**.

The reservation will be extended and a receipt will be printed.

9.9.9 Terminate Reservation

Reservations previously created can also be terminated.

1) Press **[Terminate Reservation]** within the **Stock Control** menu.

The **Terminate Reservation** window opens.

Terminate Reservation window

2) Enter the reservation number and press **[OK]**.

The reservation is terminated.

9.9.10 Reservation Number

Register several items within one "day reservation".

1) Press **[Reservation Number]** within the **Stock Control** menu.

2) Select **Day Reservation** from the list box.

3) Enter a new reservation number.

The reservation number must not have been assigned yet.

4) Press **[OK]**.

5) Register the first item.

6) Open the **Stock Control** menu and press **[Reservation Number]**.

7) Enter a new reservation number

The reservation number must not have been assigned yet.

8) Press **[OK]**.

The **Transaction** window opens.

9) Register another item.

•   If you need to register more items to the transaction, repeat steps 6) through 9).

10) Conclude the transaction through pressing **[OK]**.

The **Transactions** window opens.

9.9.11 Collect missing Items

If staff has discovered an empty box you can register the missing item to keep the inventory up-to-date.

NOTICE

> Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.

1) Press **[Collect missing items]** within the **Stock Control** menu.

The **Missing Items** window opens.

2) Scan the barcode or enter the item number manually and press **[OK]** afterwards.

The **Sell Item** window opens.

Sell Item window

3) Scan your ID-card or enter your salesperson ID and press **[OK]** afterwards.

- Register more missing items if necessary.
4) Press **[Total]** and conclude the transaction.

The **Transaction** window opens. The inventory is updated.

9.9.12 Reverse missing Items

If a missing item has been booked but the respective item is later found you may cancel the booking.

1) Press **[Reverse missing items]** within the **Stock Control** menu.

The **Void Missing Items** window opens.

2) Scan the barcode or enter the item number manually and press **[OK]** afterwards.

The **Sell Item** window opens.

Sell Item window

3) Scan your ID-card or enter your salesperson ID and press **[OK]** afterwards.

- Register more missing items if necessary.

4) Press **[Total]** and conclude the transaction.

The **Transaction** window opens. The inventory is updated.

9.9.13 Withdrawals

Register items which are determined for other purposes than sales purposes, e.g. for window displays. You may also use this function if you need to write-off an item.

1) Press **[Withdrawal]** within the **Stock Control** menu.

The **Withdrawal** window opens.

Withdrawal window

2) Select the reason for the withdrawal from the list box to the left.

3) Press **[OK]**.

The **Transaction** window opens.

4) Register the item you need to write off.

The **Sell Item** window opens.

Sell Item window

5) Scan your ID-card or enter your salesperson ID and press **[OK]** afterwards.

• Register more missing items if necessary.

6) Press **[Total]** and conclude the transaction.

The **Transaction** window opens. The inventory is updated.

Information	Refer to *9.9.14 Withdrawal Return* if you need to cancel a withdrawal.

9.9.14 Withdrawal Return

Proceed as follows if you need to cancel a withdrawal.

1) Press **[Withdrawal Return]** within the **Stock Control** menu.

The **Withdrawal Return** window opens.

2) Register the particular item.

• If you need to cancel a withdrawal containing several identical items use the **Pre-Select Quantity** sales function.

The **Sell Item** window opens.

3) Enter your salesperson ID and press **[OK]**.

The item will be listed within the list of positions registered.

• You may register more items.

4) Conclude the transaction on pressing **[Total]**.

The **Transaction** window opens.

9.9.15 Depot Return Item

Employ this sales function if damages have been discovered in goods delivered to your store.

1) Press **[Depot Return Item]** within the **Stock Control** menu.

The **DC Faulty** window opens.

DC Faulty window

- You may use the **Pre-Select Quantity** sales function to register several of the same items.

2) Register the particular item.

The **Sell Item** window opens.

3) Enter your salesperson ID and press **[OK]**.

The **DC Faulty** window opens.

The item registered will appear within the list of positions registered.

- You may register further items.

4) Conclude the transaction on pressing **[Total]**.

The **Transaction** window opens. A receipt will be printed. The store manager is required to sign the receipt.

9.9.16 Cancel DC Return

If you need to cancel a DC return, proceed as follows.

1) Press **[Cancel DC Return]** within the **Stock Control** menu.

The **Cancel DC Faulty** window opens.

2) Register the particular item.

- You may use the **Pre-Select Quantity** sales function to register several of the same items.

The **Sell Item** window opens.

3) Enter your salesperson ID.

The item will be listed within the list of position registered.

- You may register further items.

4) Conclude the transaction on pressing **[Total]**.

The **Transactions** window opens

9.10 The *Languages* Menu

The **Languages** menu contains all languages available for your LUCAS POS. You may change the POS' language at any time, even when it is operating.

Operations window − **Languages** menu

NOTICE	A multi-language version of LUCAS POS needs to be installed in order to switch between languages.

NOTICE	Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.

1) Press the button displaying the desired language within the **Languages** menu (e.g. **English** or **German**).

The user interface will be displayed in the language selected.

Information	Depending on your configuration some texts may not be displayed in the language selected but in the superordinate language.

10 Financing Functions

Any operation used for financing a sales transaction is defined as a financing function. Financing functions are called from the **Financing** window after pressing **[Total]** in the **Transaction** window.

A transaction may be financed through different payment methods (e.g. in cash, in foreign currency, through credit or debit cards, with gift cards, etc.), or even through a combination of different payment methods. The type of transaction financed does not matter; it may be a sales transaction or a refund to a customer.

The financing menus contain all functions required to finance a transaction.

Any currencies approved in your company as well as card payments of all kinds, cheques may be booked for the entire receipt. Discounts or rebates, etc. may still be granted for the entire receipt while financing has already been initialised.

The following chapters explain the financing functions available in LUCAS POS. They will be described in the same order they appear within the LUCAS POS menu.

Calling Financing Functions

There are different options located on different levels for calling financing functions contained in LUCAS POS.

NOTICE

> Note that only those financing functions you can actually execute at a particular time can be activated. Which financing functions are currently available depends on the status of the financing process (e. g. on whether or not financing may have been partially realised). If a financing function is currently not available, its button is greyed out.
>
> The range of financing functions you may call also depends on the customising of your **LUCAS POS** and on your user rights.

Level 1

The **Financing** window contains buttons with frequently used financing functions (e.g. **[Cheque**, **Card]** and **[Gift Voucher Redemption]**, etc.). Execute these functions easily and quickly by pressing the relevant button.

Financing window with buttons for frequently used financing functions

Level 2

1) Press **[Menu]** in the **Financing** window for additional financing functions.

The **Operations** window opens.

Operations window - **Top 10** - financing functions

To the right you will find ten centrally defined buttons for frequently used financing functions ("Top 10"), which you can execute directly by pressing the relevant buttons.

Level 3

To the left you will find a menu divided into several categories holding the complete range of financing functions available.

Operations window with menu buttons for all financing functions

On pressing a category all of its containing financing functions are displayed. Execute any by pressing the corresponding button.

If the complete range of menus available cannot be displayed on one page, use [▲] and [▼] to scroll up or down the list of menus.

10.1 The *Local Currencies* Menu

If you would like to finance a transaction's total entirely or partially in local currency call the **Local Currencies** financing function.

Operations window − **Local Currencies** menu

Information
Note that there can only be one local currency which in general will be your country's national currency. The local currency is defined centrally at the head office.

Financing a transaction in local currency (cash)

Finance a transaction in local currency as follows.

Information
If the transaction is financed with a negative total press Cash Payment to pay the change to the customer in local currency cash.

1) Press **[Local Currency]** within the **Local Currency** menu or press Cash Payment.

Information
You may also enter the cash received from the customer into the input field within the

Financing window first, then press **[Local Currency]** or Cash Payment after that. If you choose to enter the information beforehand, skip the corresponding step later in the process.

The **Cash Payment** window opens.

Cash payment window

The amount due is displayed in the **Amount Due** field.

2) Enter the amount received in cash from the customer into the **Amount** field.

The transaction's total is already entered here by default. If you received a different amount from the customer enter the amount into the input field.

- If you need to make corrections, press **[←]** to delete the entry character by character from left to right. Press **[Delete]** to delete all content from the input field.

3) Press **[OK]**.

- If the payment covers the transaction's total exactly, a receipt is printed and the till drawer opens so that any cash can be placed inside.

The **Transaction** window opens.

- If the payment exceeds the transaction's total, the customer is receiving change. The **Cash Payment** window closes and the **Financing** window opens again.

The payment received is added to the list of payment methods used and the amount of change is displayed in local currency under **Change**. The till drawer opens, so that any cash can be placed inside.

Information

> Any change is usually being paid in local currency but may be paid back with other means of payment as well (e .g. foreign currency cash, vouchers, etc.)
>
> If you would like to pay back change using another payment method, call the corresponding financing function.

- If the amount due is not settled through the payment, the **Cash Payment** window closes and the **Financing** window opens again.

The payment received is added to the list of payment methods used and the outstanding balance is displayed under **Amount Due**. The customer may settle the outstanding balance using another payment method.

Using Denomination fields for financing

1) Press the denomination button displaying the amount received from the customer.

100,-

50,-

20,-

10,-

If a customer pays with 10,-, 20,-, 50,- or 100,- notes you may use the denomination buttons for financing instead of entering the amount manually.

- If the payment covers the transaction's total exactly, a receipt is printed and the till drawer opens so that any cash can be placed inside.

The **Transaction** window opens.

- If the payment exceeds the transaction's total, the customer is receiving change.

The **Cash payment** window closes and the **Financing** window opens again. The payment received is added to the list of payment methods used and the amount of change is displayed in local currency under **Change**. The till drawer opens, so that any cash can be placed inside.

Information

Any change is usually being paid in local currency but may be paid back with other means of payment as well (e .g. foreign currency, vouchers, etc.)

If you would like to pay back change using another payment method, call the corresponding financing function.

- If the amount due is not settled through the payment, the **Cash payment** window closes and the **Financing** window opens again.

The payment received is added to the list of payment methods used and the outstanding balance is displayed under **Amount Due**. The customer may settle the outstanding balance using another payment method.

Information

If the transaction is financed with a negative total and the customer would like the change to be paid in foreign currency cash press the corresponding button for the foreign currency and conclude the transaction.

10.2   The *Foreign Currencies* Menu

Finance a transaction's total entirely or partially in foreign currency cash.

Operations window − **Foreign Currencies** menu

You will find the following financing functions within the **Foreign Currencies** menu.

Selected foreign currencies   *Exchange Rates*   *Currency Converter*

For detailed information on individual financing functions refer to the corresponding chapters.

Information

> Note that foreign currencies approved for payment will be centrally determined. The **Foreign Currencies** menu will therefore only contain currencies which have been previously approved and set at the head office.

Financing a transaction in foreign currency (cash)

Finance a transaction in foreign currency cash as follows.

4) Press the button of the desired foreign currency within the **Foreign Currencies** menu.

Information

> You may also enter the cash received from the customer into the input field within the **Financing** window first, then press the corresponding button for the currency desired (e.g. **£**) after that. If you choose to enter the information beforehand, skip the corresponding action step later in the process.

The **Cash Paying Foreign Currency** window opens.

Cash Paying Foreign Currency window

The amount due is displayed in the **Amount Due** field.

5)   Enter the amount received in cash from the customer into the **Amount** field.

The transaction's total is already entered here by default. If you received a different amount from the customer enter the amount into the input field.

*   If you need to make corrections, press **[←]** to delete the entry character by character from left to right. Press **[Delete]** to delete all content from the input field.

6)   Press **[OK]**.

*   If the payment covers the transaction's total exactly, a receipt is printed and the till drawer opens so that any cash can be placed inside.

The **Transaction** window opens.

*   If the payment exceeds the transaction's total, the customer is receiving change. The **Cash Paying Foreign Currency** window closes and the **Financing** window opens again.

| Foreign currency | Amount paid in foreign currency | Amount converted into local currency |

Financing window − list of payment methods used in foreign currency

The payment received is added to the list of payment methods used and the amount of change is displayed in local currency under **Change**. The till drawer opens, so that any cash can be placed inside.

Information

> Any change is usually being paid in local currency but may be paid back with other means of payment as well (e .g. foreign currency cash, vouchers, etc.)
>
> If you would like to pay back change using another payment method, call the corresponding financing function.

*   If the amount due is not settled through the payment, the **Cash Paying Foreign Currency** window closes and the **Financing** window opens again.

The payment received is added to the list of payment methods used and the outstanding balance is displayed under **Amount Due**. The customer may settle the outstanding balance using another payment method.

10.2.1   Exchange Rates

LUCAS POS can display exchange rates for all currencies accepted. This is helpful e.g. if a foreign customer asks for the current exchange rate to convert their spending.

1) Press **[Exchange Rates]** within the **Foreign Currencies** menu.

The **Display Exchange Rates** window opens.

The local currency used as a reference for converting foreign currencies appears under **Key currency**.

Display Exchange Rates window

2) Press **[OK]** to close the **Display Exchange Rates** window.

The **Financing** window opens.

10.2.2   Currency Converter

Convert one currency into the other employing this function.

1) Press **[Currency Converter]** within the **Foreign Currencies** menu.

The **Currency Converter** window opens.

Currency Converter window

2) Select the base currency and the desired currency from the drop down menus to the left.

EUR will be displayed as base currency by default in the **Convert from** field.

3) Enter the amount to be converted into the **Amount** field.

4) Press **[Convert]**.

Currency Converter window

The **Currency Converter** window will now display the result of the conversion as well as the current exchange rate.

● You may convert further values into different currencies now.

5) Press **[Close]** to close the window.

The **Financing** window opens.

10.3 The *Other Payment* Menu

The **Other Payment** menu contains financing functions for financing a transaction using payment methods other than cards, cheques or cash payments.

Operations window − **Other Payment** menu

You will find the following financing functions within the **Other Payment** menu. Note that the range of payment methods available will depend on your customisation.

10.3.1 Points

A customer may finance the current transaction entirely with points.

1) Press **[Points]** within the **Other Payment** menu.

The amount due is financed with points. A receipt is printed and the **Transaction** window opens.

10.3.2 Miles & More

This function allows the customer to finance the total amount or partial amount of the current transaction using miles from the Lufthansa Miles & More bonus programme.

1) Press **[Miles & More]** within the **Other Payment** menu.

The **Miles and More Payment** window opens.

Miles and More Payment window

In the **Amount Due** field you will find the amount of miles required to finance the entire receipt (the exchange rate is determined within the Miles & More database).

2) Swipe the card through the card reader or enter the customer's Miles & More card number manually.

    a) Press **[OK]** to confirm your entry.

If sufficient miles are available to settle the entire amount, the **Miles and More Payment** window closes, a receipt is printed and the **Transaction** window opens.

If the transaction's total cannot be settled fully, the configuration of your till application determines whether partial financing using miles is possible.

    a) If a partial financing using miles is possible, the **Miles and More Payment** window closes and the **Financing** window opens.

The miles' value is added to the list of payment methods used and the outstanding balance due is displayed under **Amount Due**. The customer will have to choose another payment method to conclude the transaction.

    b) If partial financing using miles is not possible, the receipt cannot be financed using miles and you will receive an error message. Confirm the error message by pressing **[OK]** and finance the transaction using a different payment method.

10.3.3 Coupon Payment

This function allows for the current transaction to be financed either partially or entirely through coupons. A coupon may trigger a discount, rebate or a Mix&Match promotion.

NOTICE

> Note that some coupons may only be redeemed together with the purchase of a specific item and may be valid for only a limited time.

1) Press **[Coupon Payment]** within the **Other Payment** menu.

You may also enter the amount of the coupon into the input field within the **Financing** window first, then press **[Coupon Payment]** within the **Other payment** menu after that. If you choose to enter the information beforehand, skip the corresponding action step later in the process.

The **Coupon** window opens.

Coupon window

2) Scan the coupon's barcode. If no barcode is printed on the coupon enter the information required manually (enter the date using DD/MM/YY).

3) Press **[OK]** to confirm your entry.

• If the payment covers the transaction's total exactly, a receipt is printed and the till drawer opens so that any cash can be placed inside.

The **Transaction** window opens.

• If the payment exceeds the transaction's total, the customer is receiving change. The **Coupon** window closes and the **Financing** window opens again.

The payment received is added to the list of payment methods used and the amount of change is displayed in local currency under **Change**. The till drawer opens, so that any cash can be placed inside.

Any change is usually being paid in local currency but may be paid back with other means of payment as well (e .g. foreign currency cash, vouchers, etc.)

If you would like to pay back change using another payment method, call the corresponding financing function.

• If the amount due is not settled through the payment, the **Coupon** window closes and the **Financing** window opens again.

The payment received is added to the list of payment methods used and the outstanding balance is displayed under **Amount Due**. The customer may settle the outstanding balance using another payment method.

10.3.4 Downpayment Redemption

Book a downpayment already made by the customer to use as a payment method to finance the current transaction's total either entirely or in parts.

NOTICE

A connection between your till and the store or back office database must be established in order to execute this function.

1) Press **[Downpayment Redemption]** within the **Other Payment** menu.

Information

You may also enter the amount of the downpayment into the input field within the **Financing** window first, then press **[Downpayment Redemption]** within the **Other payment** menu after that. If you choose to enter the information beforehand, skip the corresponding action step later in the process.

The **Downpayment Redemption** window opens.

Downpayment redemption window

2) Enter the number of the downpayment you would like to redeem for financing.

Information

The downpayment ID is printed on the receipt containing the downpayment.

3) Press **[OK]** to confirm your entry.

The **Downpayment** field will automatically display the amount of the downpayment once the downpayment ID has been entered and confirmed.

4) Press **[OK]** if all entries displayed are correct.

- If the payment covers the transaction's total exactly, a receipt is printed and the till drawer opens so that any cash can be placed inside.

The **Transaction** window opens.

- If the payment exceeds the transaction's total, the customer is receiving change. The **Downpayment Redemption** window closes and the **Financing** window opens again.

The payment received is added to the list of payment methods used and the amount of change is displayed in local currency under **Change**. The till drawer opens so that any cash can be placed inside.

Information

Any change is usually being paid in local currency but may be paid back with other means of payment as well (e .g. foreign currency cash, vouchers, etc.)

If you would like to pay back change using another payment method, call the corresponding financing function.

- If the amount due is not settled through the payment, the **Downpayment Redemption** window closes and the **Financing** window opens again.

The payment received is added to the list of payment methods used and the outstanding balance is displayed in the **Amount Due** field. The customer may settle the outstanding balance using another payment method.

10.3.5   Gift Voucher Redemption

You can use this function to accept a voucher as tender and use it to finance the amount of the current transaction either entirely or partially.

NOTICE

A connection between the till and the gift certificate server needs to be established in order to redeem vouchers which require validation from the gift certificate server.

- If the connection is not established an information message is displaying a code and your head office's phone number. Dial the number and state the code. The employee will be able to determine whether or not the voucher has been redeemed yet. If the voucher has not been redeemed yet you will be given a code to enable voucher return.
- Alternatively, a warning message might be displayed requesting your permission to proceed returning the voucher despite of the missing connection. Be aware that if you choose to return the voucher despite the missing connection there will always be a risk involved since there will not be any validation from the gift certificate server.

Information

Depending on the configuration of your LUCAS POS, it may be possible to overpay a transaction's total using a voucher. The remaining amount may be paid out in another means of payment (e. g. cash or even in the form of another voucher).

1) Press **[Gift Voucher Redemption]** within the **Other Payment** menu.

The **Gift Voucher Redemption** window opens.

Gift Voucher Redemption window

2) Select the type of voucher from the list box to the left.

Ensure that the store which issued the gift voucher is displayed under **Store**. Make corrections if necessary. The company number is displayed by default and cannot be changed.

3) Enter the voucher ID into the **Number** field.

4) Enter the voucher's value into the **Amount** field.

5) Press **[OK]** to confirm your entries.

- If the payment covers the transaction's total exactly, a receipt is printed and The till drawer opens so that any cash can be placed inside.

The **Transaction** window opens.

- If the payment exceeds the transaction's total, the customer is receiving change. The **Gift Voucher Redemption** window closes and the **Financing** window opens again.

The payment received is added to the list of payment methods used and the amount of change is displayed in local currency under **Change**. The till drawer opens so that any cash can be placed inside.

- If the amount due is not settled through the payment, the **Gift Voucher Redemption** window closes and the **Financing** window opens again.

The payment received is added to the list of payment methods used and the outstanding balance is displayed in the **Amount Due** field. The customer may settle the outstanding balance using another payment method.

10.3.6 Credit Notes

If a customer has overpaid the amount due through a voucher, the change can be issued in the form of another voucher. You may use this function for other reasons (e.g. returns).

NOTICE

The transaction's total must be negative or the customer must have overpaid the amount due in order for you to execute this function.

A connection between the till and the central gift certificate server needs to be established in order to return vouchers which require validation from the gift certificate server. If the connection is not established, a warning message is displayed and you may choose whether or not you would like to proceed.

1) Press **[Credit Notes]** within the **Other Payment** menu.

The **Voucher Sales** window opens.

Voucher Sales window

2) Select the voucher type from the list box to the left.

Information

Each voucher description corresponds to a specific voucher type which determines the voucher's conditions. These may be a minimum or maximum amount, a limited validity or whether or not the voucher ID is generated and issued automatically.

Voucher types may be created and configured within the (Central) Store Management System ((C)SMS).

Depending on the voucher type the fields **Valid to** and **Number** may already contain information. If this is not the case:

3) Enter the expiration date into the **Valid To** field (using MM/YY format).

4) Enter the voucher's number.

If the voucher ID is printed on the vouchers, enter the specific voucher number. If the **Number** field displays the entry **issued automatically** the voucher number has been generated automatically.

The change is displayed under **Amount** in local currency value. Make corrections if necessary.

5) Press **[OK]** to confirm your entries.

The **Transaction** window opens. The transaction is concluded and a receipt is printed. A receipt is printed for the voucher issued.

10.3.7 Customer Gift Certificate

If the current transaction has already been assigned to a specific customer by calling the **Customer Purchase** function, all unredeemed gift certificates stored for this customer are displayed after having called the **Customer Gift Certificate** function. You may point out the existence of unredeemed gift certificates to a customer and they may then be redeemed to finance the current transaction.

NOTICE

> In order to execute the **Customer Gift Certificate** function you need to have called the **Customer Purchase** function through the customer search, not by entering the customer ID or their account information.

NOTICE

> A connection between the till and the gift certificate server needs to be established in order to redeem vouchers which require validation from the gift certificate server.
>
> - If the connection is not established an information message is displaying a code and your head office's phone number. Dial the number and state the code. The employee will be able to determine whether or not the voucher has been redeemed yet. If the voucher has not been redeemed yet you will be given a code to enable voucher return.
>
> - Alternatively, a warning message might be displayed requesting your permission to proceed returning the voucher despite of the missing connection. Be aware that if you choose to return the voucher despite the missing connection there will always be a risk involved since there will not be any validation from the gift certificate server.

Information

> Depending on the configuration of your LUCAS POS, it may be possible to overpay a transaction's total using a voucher. The remaining amount may be paid out in another means of payment (e. g. cash or even in the form of another voucher).

1) Press **[Customer Gift Certificates]** within the **Other Payment** menu.

The **Available Gift Certificates** window opens.
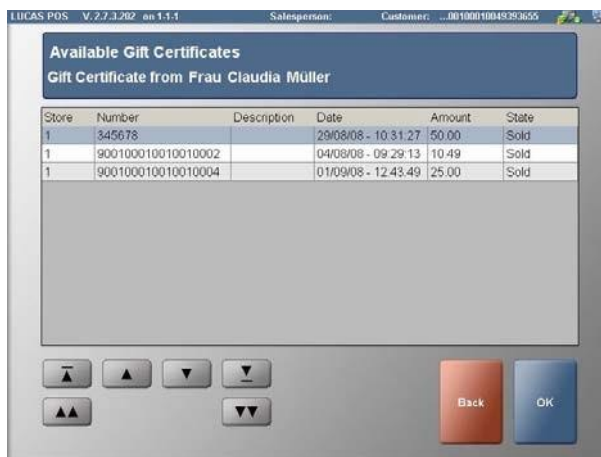
Available Gift Certificates window

Any unredeemed vouchers are displayed along with the following information.

Store	Store the voucher was created
Number	Voucher number
Description	Voucher type, e.g. Gift Voucher or Bonus Voucher

Date	Date, the voucher was created
Amount	The voucher's value
State	Status of the voucher
	sold: The voucher has not yet been redeemed and can be returned.

2) If the customer wishes to redeem one of the vouchers displayed, select the voucher and press **[OK]**.

- If the payment covers the transaction's total exactly, a receipt is printed and the till drawer opens so that any cash can be placed inside.

The **Transaction** window opens.

- If the payment exceeds the transaction's total, the customer is receiving change. The **Available Gift Certificates** window closes and the **Financing** window opens again.

The payment received is added to the list of payment methods used and the amount of change is displayed in local currency under **Change**. The till drawer opens so that any cash can be placed inside.

> **Information**
>
> Any change is usually being paid in local currency but may be paid back with other means of payment as well (e .g. foreign currency cash, vouchers, etc.).
>
> If you would like to pay back change using another payment method, call the corresponding financing function.

- If the amount due is not settled through the payment, the **Available Gift Certificates** window closes and the **Financing** window opens again.

The payment received is added to the list of payment methods used and the outstanding balance is displayed in the **Amount Due** field. The customer may settle the outstanding balance using another payment method.

> **NOTICE**
>
> If you need to redeem a voucher without a connection to the gift certificate server being established and without validation from the head office being available the **Gift Voucher Redemption** window will open. Enter the information required and press **[OK]** to redeem the voucher.

10.3.8 Customer Card

Registered customers may finance their transaction through their customer account.

> **Information**
>
> The transaction must be within financing mode.

1) Press **[Customer Card]** within the **Other Payment** menu.

The **Customer Purchase** window opens.

Customer Purchase window

2) Scan customer card or enter information manually.

The transaction will be linked to the customer. The amount due will be displayed.

Other payments: Customer Card window

3) On pressing **[OK]** the transaction will be financed through the customer's account.

10.3.9 Merchandise Credits

This function allows the customer to take out a purchase loan in order to conclude their purchase.

1) Press **[Merchandise Credits]** within the **Other Payment** menu.

Information	You may also enter the amount for the purchase loan into the input field within the **Financing** window first, then press **[Merchandise Credits]** within the **Other payment** menu after that. If you choose to enter the information beforehand, skip the corresponding action step later in the process.

The **Other Payments: Merchandise Credits** window opens.

Other Payments: Merchandise Credits window

The amount due is displayed in the **Amount Due** field.

2) Enter the amount of the purchase loan into the **Amount** field.

3) Press **[OK]** to confirm your entry.

- If the payment covers the transaction's total exactly, a receipt is printed and the till drawer opens so that any cash can be placed inside.

The **Transaction** window opens.

- If the payment exceeds the transaction's total, the customer is receiving change. The **Other Payments: Merchandise Credits** window closes and the **Financing** window opens again.

The payment received is added to the list of payment methods used and the amount of change is displayed in local currency under **Change**. The till drawer opens so that any cash can be placed inside.

Information

> Any change is usually being paid in local currency but may be paid back with other means of payment as well (e .g. foreign currency cash, vouchers, etc.)
>
> If you would like to pay back change using another payment method, call the corresponding financing function.

- If the amount due is not settled through the payment, the **Other Payments: Merchandise Credits** window closes and the **Financing** window opens again.

The payment received is added to the list of payment methods used and the outstanding balance is displayed under **Amount Due**. The customer may settle the outstanding balance using another payment method.

10.3.10 Gift Certificate fixed value

A transaction will be financed, either entirely or in parts, through a gift certificate that possesses a previously configured, fixed value.

1) Press **[Gift Certificate fixed value]** in the **Other payment** menu.

2) Enter the amount of gift certificates and press **[OK]**.

Information

> The value cannot be modified at the POS.

The transaction's total will be deducted by the voucher's value.

3) Finance the transaction with further tender if necessary.

10.4 The *Cards* Menu

The **Cards** menu contains all financing functions required to settle the current transaction through card payment (e.g. debit or credit card).

Operations window − **Cards** menu

You will find the following financing function within the **Cards** menu.

Card

For detailed information on individual financing functions refer to the corresponding chapters.

NOTICE

> Depending on your customisation only one financing function will be displayed in the **Cards** menu. However, it will be possible to book both debit and credit card purchases through this function.
>
> Alternatively, two individual financing functions for each debit and credit cards can be displayed.

10.4.1 Card

Settle the entire transaction or part of it through debit or credit card.

NOTICE

> A transaction's total cannot be overpaid through credit or debit card payment.

1) Press **[Card]** within the **Cards** menu.

The **Card payment** window opens.

Card payment window

The full amount of the transaction's total is already displayed in the **Amount** field. If only part of the transaction's total will be paid through credit or debit card, make corrections accordingly.

> **NOTICE**
> Depending on your configuration additional entries such as card/account number, sort code and the card's expiry date (using MM/YY format) must be made. In this case swipe the card through the card reader or enter the information manually.

2) Press **[OK]** to confirm your entries and follow any instructions displayed on the EFT terminal.

> **NOTICE**
> You may be required to enter additional information if a corresponding message appears on your screen.
>
> Credit card payments may require validation. In this case a phone number will be displayed. Call the number to receive confirmation on the credit line and enter the code required to continue financing.

3) After the transaction is concluded, a receipt is printed, which the customer may have to sign in order for the debit to be effective.

- If the payment covers the transaction's total exactly, a receipt is printed and the till drawer opens so that any cash can be placed inside.

The **Transaction** window opens.

- If the amount due is not settled through the payment, the **Card payment** window closes and the **Financing** window opens again.

The payment received is added to the list of payment methods used and the outstanding balance is displayed in the **Amount Due** field. The customer may settle the outstanding balance using another payment method.

10.5 The *Cheque* Menu

You can use the financing functions in the **Cheque** menu to finance the current transaction with a variety of different cheques (e.g. Travellers Cheques).

Operations window − **Cheque** menu

You will find the following financing functions within the **Cheque** menu.

Travellers Cheque   *Cheque with number*   *Cheque with magnetic ink*

Mail Cheque

For detailed information on individual financing functions refer to the corresponding chapters.

10.5.1 Travellers Cheque

Finance the current transaction either entirely or partially through a Travellers Cheque.

1) Press **[Travellers Cheque]** within the **Cheque** menu.

Information ⠉⠉⠉

> You may also enter the Travellers Cheque's value into the input field within the **Financing** window first, then press **[Travellers Cheque]** within the **Cheque** menu after that. If you choose to enter the information beforehand, skip the corresponding action step later in the process.

The **Travellers Cheque** window opens.

Travellers Cheque window

The amount due is displayed in the **Amount** field.

- If the Travellers Cheque only covers part of the transaction's total, make changes accordingly.

2) Press **[OK]** to confirm your entry.

An information message opens requesting an identity check by checking the customer's signature on the cheque against an ID bearing their signature.

   a) Press **[No]** if the identity check has failed.

Payment through Travellers Cheque will be denied. Ask the customer to conclude the purchase using another payment method.

   b) Press **[Yes]** if the customer could be clearly identified.

- If the payment covers the transaction's total exactly, a receipt is printed and the till drawer opens so that any cash can be placed inside.

The **Transaction** window opens.

- If the payment exceeds the transaction's total, the customer is receiving change. The **Travellers Cheque** window closes and the **Financing** window opens again.

The payment received is added to the list of payment methods used and the amount of change is displayed in local currency under **Change**. The till drawer opens and the Travellers Cheque can be placed inside.

Information

Any change is usually being paid in local currency but may be paid back with other means of payment as well (e .g. foreign currency cash, vouchers, etc.)

If you would like to pay back change using another payment method, call the corresponding financing function.

- If the amount due is not settled through the payment, the **Travellers Cheque** window closes and the **Financing** window opens again.

The payment received is added to the list of payment methods used and the outstanding balance is displayed in the **Amount Due** field. The customer may settle the outstanding balance using another payment method.

10.5.2   Cheque with number

1) Press **[Cheque with number]** within the **Cheque** menu.

The **Cheque** window opens.
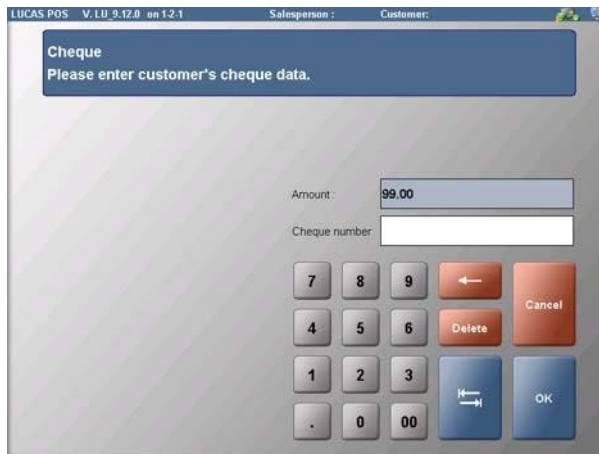
Cheque window

The amount due is displayed in the **Amount** field.

- If the cheque only covers part of the total amount due, make changes accordingly.

2) Enter the cheque's number.

3) Press **[OK]** to confirm your entry.

An information message opens requesting an identity check by checking the customer's signature on the cheque against an ID bearing their signature.

a) Press **[No]** if the identity check has failed.

Payment through cheque will be denied. Ask the customer to conclude the purchase using another payment method.

b) Press **[Yes]** if the customer could be clearly identified.

- If the payment covers the transaction's total exactly, a receipt is printed and the till drawer opens so that any cash can be placed inside.

The **Transaction** window opens.

- If the amount due is not settled through the payment, the **Cheque** window closes and the **Financing** window opens again.

The payment received is added to the list of payment methods used and the outstanding balance is displayed in the **Amount Due** field. The customer may settle the outstanding balance using another payment method.

10.5.3 Cheque with magnetic ink

1) Press **[Cheque with magnetic ink]** within the **Cheque** menu.

   The **Cheque with magnetic ink** window opens.

The amount due is displayed in the **Amount** field.

> If your till is equipped with a MICR (**M**agnetic **I**nk **C**haracter **R**ecognition) reader, read out the cheque's information. All information will then be registered within the entry fields. Ensure that any information stated is correct and press **[OK]**.

- If the cheque only covers part of the total amount due, make changes accordingly.

2) Enter the customer's **sort code** and **account number** along with the **cheque's number**.

3) Press **[OK]** to confirm your entry.

An information message opens requesting an identity check by checking the customer's signature on the cheque against an ID bearing their signature.

   a) Press **[No]** if the identity check has failed.

Payment through cheque will be denied. Ask the customer to conclude the purchase using another payment method.

   b) Press **[Yes]** if the customer could be clearly identified.

Another information message opens, asking whether you would like to print onto the face of the cheque.

   a) Press **[Yes]** to print onto the face of the cheque, or

   b) press **[No]** if you do not wish to print onto the face of the cheque.

The **Capture Identification** window opens.

Capture Identification window

4) Enter the required information under **Type/Postcode** and **Identification No.** and press **[OK]** afterwards.

- If the payment covers the transaction's total exactly, a receipt is printed and the till drawer opens so that any cash can be placed inside.

The **Transaction** window opens.

- If the amount due is not settled through the payment, the **Capture Identification** window closes and the **Financing** window opens again.

The payment received is added to the list of payment methods used and the outstanding balance is displayed in the **Amount Due** field. The customer may settle the outstanding balance using another payment method.

10.5.4 Mail Cheque

If the transaction's total is a negative amount and therefore financing will involve paying change to the customer, you have the option to pay the entire amount in form of a cheque that is sent via mail to an address stated by the customer.

This is particularly useful in cases where there is not enough cash in the drawer.

1) Press **[Mail Cheque]** within the **Cheque** menu.

   The **Mail Cheque** window opens.

Mail Cheque window

You now have several options to proceed with. These options are not dependent on one another; however, they do require the executing of the previously described steps.

Choose between…

- acquiring customer information, see *Acquiring customer information.*
- searching for customer information, see *Searching for Customer information.*

Acquiring customer information

1) Press **[Enter Address]**:
   a) If the customer's information has not yet been saved in the database and the customer would like his information to be entered, or
   b) If the current transaction has been assigned to the customer prior to executing the **Mail Cheque** function and if the information saved does not require an update.

The **Mail Cheque – Address Entry** window opens.

Address Entry window

2) Enter the customer's name, address and phone number.

If your till is not equipped with a keyboard use the *virtual keyboard* after pressing ▣▣ .
If the current transaction has been assigned to the customer prior to executing the **Mail Cheque** function the customer's information contained in the database will be displayed and may be changed if necessary.

Changes made will not be saved within the database.

3) Press **[OK]**.

If the entries made are incorrect, press **[Enter Address]** again and correct them.

The mail cheque will be printed along with a receipt and the transaction will be concluded.

Searching for Customer information

1) Press **[Search Address]** when:

   a) The customer would like to have his information entered into the database, or

   b) The customer's information has already been saved in the database, but the information has changed or when there are several addresses at choice.

The **Mail Cheque – Customer Address** window opens.

Customer Address window

All addresses available are displayed.

2) Select an address out of all addresses displayed for this customer.

Alternatively you may choose between the following options:

- If the customer's information has not yet been entered and saved within the database you may create a new entry for this customer on pressing **[Create Customer]** (see *9.6.2 New Customer*).

- You may change any existing customer information by pressing **[Change Customer]** (see *9.6.3 Modify Customer*).

- If the current transaction has not been assigned to the customer yet, you may search for his information in the database on pressing **[Search Customer]** (see *9.6.1 Customer View*).

3) After selecting the address, press **[OK]**.

The mail cheque will be printed along with the receipt and the transaction will be concluded.

10.6 The *Price Reduction* Menu

The **Price Reduction** menu provides you with financing functions that allow you to reduce the regular total amount of a receipt by either a percentage amount (Receipt Discount) or an absolute amount (Receipt Reduction), e.g. to provide a privilege to customers purchasing a large number of items.

Operations window − **Price Reduction** menu

You will find the following financing functions within the **Price Reduction** menu.

Receipt Discount   *Receipt Reduction*   *Customer Group Receipt Discount*

Germany rounds up

For detailed information on individual financing functions refer to the corresponding chapters.

10.6.1 Receipt Discount

Allow a percentage discount on a transaction's discountable amount.

NOTICE	The transaction must not be financed yet in order to call this function.
	Only a transaction's discountable positions will be affected. Find out which positions are eligible for a discount or change settings within the (C)SMS under **Item Maintenance** ➔ **Item Options**.
	A receipt discount cannot be reversed. If one has been assigned by accident, financing must be aborted (see *6.4 Abort Financing*) and must be initiated again.

2)   Press **[Receipt Discount]** within the **Price Reduction** menu.

Information	You may also enter the discount percentage into the input field within the **Financing** window first, then press **[Receipt Discount]** within the **Price Reduction** menu after that. If you choose to enter the information beforehand, skip the corresponding action step later in the process.

The **Receipt Discount** window opens.

Receipt Discount window

The transaction's discountable amount is displayed in the **Discountable Amount** field.

3) Select the discount type from the list box to the left.

4) Enter the discount percentage into the **Percent** field.

5) Press **[OK]** to confirm your entries.

The **Financing** window opens. The discount is added to the list of payment methods and is deducted from the transaction's total.

10.6.2 Receipt Reduction

Allow a price reduction in the form of a fixed amount on a transaction's discountable amount.

NOTICE

The transaction must not be financed yet in order to call this function.

The price reduction must not exceed the total of the transactions discountable positions. Only discountable positions from the transaction will be affected. Find out which positions are eligible for a discount or change settings within the (C)SMS under **Item Maintenance ➔ Item Options**.

A receipt discount cannot be reversed. If one has been assigned by accident, financing must be aborted (see *6.4 Abort Financing*) and must be initiated again.

1) Press **[Receipt Reduction]** within the **Price Reductions** menu.

Information

You may also enter the discount's amount into the input field within the **Financing** window first, then press **[Receipt Reduction]** within the **Price Reduction** menu after that. If you choose to enter the information beforehand, skip the corresponding action step later in the process.

Note that the amount entered must have two decimal places (e. g. 5.00)

The **Receipt Reduction** window opens.

Receipt Reduction window

The transaction's discountable amount is displayed under **Discountable Amount**.

2) Select the reduction type from the list box to the left.

3) Enter the amount of the reduction into the **Reduction** field.

4) Press **[OK]** to confirm your entries.

The **Financing** window opens. The price reduction is added to the list of payment methods and is deducted from the transaction's total.

10.6.3 Customer Group Receipt Discount

Allow a receipt discount for customers who belong to a particular customer group.

1) Press **[Customer Grp. Receipt Discount]** within the **Price Reduction** menu.

The **Customer Purchase** window opens.

Customer Purchase window

2) Enter the required information into at least one of the two input fields and press **[OK]**.

The **Receipt Discount** window opens.

Receipt discount window

In the list box to the left **Customer Group Receipt Discount** is already selected as a reason.

3) Enter the discount percentage into the **Percent** field.

4) Press **[OK]**.

The **Financing** window opens. The discount is added to the list of payment methods and is deducted from the transaction's total.

10.6.4 Germany rounds up

Donations for the charitable foundation "Germany rounds up" may be collected through this function. Customers who decide to participate allow for the transaction's total to be rounded to the next higher tenth of the Euro (or local currency).

1) Press **[Germany rounds up]** within the **Price Reduction** menu.

The **Financing** window displays the amount by which the transaction's total will be raised within the list of positions registered.

Initialise payment to conclude the transaction.

10.7 The *Giftcard* Menu

A gift card can be compared to a prepaid card which can be recharged with a particular value and then used as a payment method.

Operations window − **Giftcard** menu

You will find the following financing functions within the **Giftcard** menu.

Redeem GC (Gift Card)   ***Cashout GC (Gift Card)***   ***Activate GC (Gift Card)***

Reload GC (Gift Card)

For detailed information on individual financing functions refer to the corresponding chapters.

NOTICE

> A connection between your till and the gift card server needs to be established in order to execute gift card functions. If a connection could not be established, gift card functions may be not or only partially available after authorisation by phone. This is depending on the customisation of your LUCAS POS.

10.7.1 Redeem GC (Gift Card)

This function allows for financing a transaction through gift cards.

NOTICE

> The gift card must be at hand or the gift card number must be available.

1) Press **[Redeem GC]** within the **Gift Card** menu.

The **Redeem Gift Card** window opens.

Redeem Gift Card window

The transaction's total is displayed in the **Amount** field.

If the customer chooses to settle only a part of the transaction's total through a gift card, make changes in the **Amount** field accordingly. However, the amount paid through a gift card may not exceed the transaction's total.

2) Scan the gift card. Alternatively, you may enter the information manually or swipe it through a card-reading device.

3) Press **[OK]** to confirm your entries.

• If the payment covers the transaction's total exactly, a receipt is printed and the till drawer opens so that any cash can be placed inside.

The **Transaction** window opens.

• If the amount due is not settled through the payment, the **Redeem Gift Card** window closes and the **Financing** window opens again.

The payment received is added to the list of payment methods used and the outstanding balance is displayed in the **Amount Due** field. The customer may settle the outstanding balance using another payment method.

Information	In the case of the transaction being cancelled or post-voided the gift card will not be charged with any amount.

10.7.2 Cashout GC (Gift Card)

This function allows for the gift card to be terminated and for all remaining value to be paid to the gift card holder or used to finance the current transaction.

NOTICE	The gift card must be at hand or the gift card number must be available.

1) Press **[Cashout GC]** within the **Giftcard** menu.

The **Giftcard cashout** window opens.

Giftcard cashout window

2) Scan the customer's gift card. Alternatively, swipe it through a card-reading device or enter the information manually.

3) Press **[OK]** to confirm your entries.

The gift card is terminated.

- If the exact amount is paid through the gift card's funds, a receipt is printed. The till drawer opens so that any cash can be placed inside.

The **Transaction** window opens.

- If the payment exceeds the transaction's total, the customer is receiving change. The **Gift Card Cashout** window closes and the **Financing** window opens again.

The payment received is added to the list of payment methods used and the amount of change is displayed in local currency under **Change**. The till drawer opens so that any cash can be placed inside.

> **Information**
>
> Any change is usually being paid in local currency but may be paid back with other means of payment as well (e .g. foreign currency cash, vouchers, etc.)
>
> If you would like to pay back change using another payment method, call the corresponding financing function.

- If the amount due is not settled through the payment, the **Gift Card Cashout** window closes and the **Financing** window opens again.

The payment received is added to the list of payment methods used and the outstanding balance is displayed under **Amount Due**. The customer may settle the outstanding balance using another payment method.

> **Information**
>
> In the case of the transaction being cancelled or post-voided the gift card will not be cashed out.

10.7.3   Activate GC (Gift Card)

If the customer is due change from a transaction (e.g. from a return) you may refund the change's value through activating and recharging a new gift card with the change.

1)   Press **[Activate GC]** within the **Giftcard** menu.

The **Gift Card activation** window opens.

Gift Card activation window with displayed amount

The amount due to the customer is displayed in the **Amount** field.

Ensure that the amount displayed is correct or make changes if necessary.

Information	The gift card can be recharged with a particular value at any time. Gift cards may also be returned and cashed out.

2)   Scan the gift card. Alternatively, you may enter the details manually or swipe the card through a card-reading device.

3)   Press **[OK]** to confirm your entries.

The **Transaction** window opens. The gift card is activated and recharged with the value entered. The transaction is concluded and a receipt is printed.

4)   Hand over the new gift card to the customer.

10.7.4 Reload GC (Gift Card)

If the customer is due change from a transaction (e.g. from a return) you may refund the change's value through recharging the customer's existing gift card with the change.

NOTICE The gift card must be at hand or the gift card number must be available.

1) Press **[Reload GC]** within the **Giftcard** menu. The

   Increase gift card balance window opens.

Increase gift card balance window with displayed amount

The amount due to the customer is displayed in the **Amount** field.

Ensure that the amount displayed is correct or make changes if necessary.

Information The gift card can be recharged with a particular value at any time. Gift cards may also be returned and cashed out.

2) Scan the gift card. Alternatively, you may enter the details manually or swipe the card through a card-reading device.

3) Press **[OK]** to confirm your entries.

The **Transaction** window opens. The gift card is recharged with the value entered. The transaction is concluded and a receipt is printed.

10.8 The *Customer* Menu

The **Customer** menu contains financing functions used to assign receipts to customers or to access and manage the customer database directly from the till.

Operations window − **Customer** menu

You will find the following financing functions within the **Customer** menu.

Customer View	*New Customer*	*Modify Customer*
Customer Purchase	*Deselect Customer*	*Customer Gift Certificate*

For detailed information on individual financing functions refer to the corresponding chapters.

NOTICE

Some functions from the **Customer** menu will require access to the Transaction Pool (T-Pool) and centralized customer administration.

10.8.1 Customer View

Display a customer's information stored in the customer database. Use this function, e.g. to see whether a customer's profile is still up-to-date.

Information

This function only allows for viewing customer information, not for changing it.

1) Press **[Customer View]** within the **Customer** menu. The

   Customer View − **Customer Data** window opens.

Customer View − Customer Data window

Here, you may search for customer information to be displayed.

2)   Enter information on the customer into at least one of the input fields.

If your till is not equipped with a keyboard use the *virtual keyboard* after pressing 🅰🅱.

3)   Press **[Search]** to initiate the customer search.

The **Customer View – Customer Selection** window appears.

Customer View − Customer Selection window

All customer names along with their corresponding customer ID's found based on the search criteria entered are displayed in a list box.

•   On selecting an entry the customer's address and phone number are displayed to the right.

4)   Select a customer and press **[View]** to view the available information.

The **Customer Information** window opens.

Customer Information window

All available customer information is displayed.

- Press **[Details]** to display the workplace address and additional addresses of the customer (if available).

- Press **[Purchase History]** to display all previous purchases made by this customer.

- Press **[Gift Voucher]** to display all vouchers issued to this customer. You may check for the customer whether they still have unredeemed vouchers.

- Press **[Back]** to return to the window **Customer View − Customer Selection** to initiate a new search.

10.8.2   New Customer

Add a new customer to the customer database. An individual customer ID is assigned to the new customer. They will be able to enjoy certain privileges such as customer discounts or special promotions.

NOTICE

> Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.

1) Press **[New Customer]** within the **Customer** menu.

The **New Customer − Main Data** window opens.

New Customer − Main Data window

2) Enter the main customer's information into the input fields.

NOTICE

In order to add a new customer to the database you need to enter the customer's last name. All further entries are optional.

Title	Title (e.g. Mr, Ms, Dr)
First Name	Customer's first name
Middle Initial	The first letter of the customer's middle name (if applicable)
Last Name	Customer's last name
Position	Customer's job position (e.g. employee, manager)
Discount info	Information on any discounts assigned to the customer
Birthday	Customer's birthday (DD/MM/YYYY)
Anniversary	Day of a particular anniversary (DD/MM/YYYY)

If your till is not equipped with a keyboard use the *virtual keyboard* after pressing [AB].
Additionally, you may activate the following check boxes.

Phone Desired	The customer wishes to receive information etc. by phone. In this case, the customer's phone number needs to be stored in the database.
Mail Desired	The customer wishes to receive information etc. by mail. In this case, the customer's postal address needs to be stored in the database.
Corporate Customer	The customer is a corporate customer.
Email Desired	The customer wishes to receive information etc. via e-mail. In this case, the customer's e-mail address needs to be stored in the database.

Information

You may enter further information into the input fields available. All information stored will be displayed.

Change or add:
- The customer's home address on pressing **[Home Address]**.
- The customer's workplace address on pressing **[Working Address]**.
- An additional address on pressing **[Additional Address]**.
- The customer's assignment to a specific group on pressing **[Group]**.

New Customer – Group window

     a)   Select a group from the drop down menu.

3)   Press **[OK]** once you have entered all information available.

The **Financing** window opens. The customer information entered is stored in the customer database along with an individual customer ID.

10.8.3   Modify Customer

Modify or complete a customer's profile in the database.

NOTICE

> Note that any transaction needs to be concluded and no items must be registered yet on the current transaction.

1)   Press **[Modify Customer]** within the **Customer** menu. The

    Modify Customer − Customer Data window opens.

Modify Customer − Customer Data window

Here you may search the database for a specific customer.

2)   Enter information on the customer into at least one of the input fields.

Information

> Use the asterisk key as a placeholder for any character strings.

If your till is not equipped with a keyboard use the *virtual keyboard* after pressing ⒜⒝.

3) Press **[Search]** to initiate the customer search.

The **Modify Customer – Customer Selection** window opens.

Modify Customer − Customer Selection window

All customer names along with their corresponding customer ID's found based on the search criteria entered are displayed in a list box.

- On selecting an entry the customer's address and phone number are displayed to the right.

4) Select a customer and press **[Modify]** to view, change or add information.

The **Modify Customer − Main Data** window opens.

Modify Customer − Main Data window

The customer's profile with their main information is displayed.

5) You may now modify or − if not yet entered − complete all information displayed.

NOTICE

In order to add a new customer to the database you need to enter the customer's last name. All further entries are optional.

Title	Title (e.g. Mr, Ms, Dr)
First Name	Customer's first name
Middle Initial	The first letter of the customer's middle name (if applicable)
Last Name	Customer's last name
Position	Customer's job position (e.g. employee, manager)
Discount info	Information on any discounts assigned to the customer
Birthday	Customer's birthday (DD/MM/YYYY)
Anniversary	Day of a particular anniversary (DD/MM/YYYY)

If your till is not equipped with a keyboard use the *virtual keyboard* after pressing ⬛⬛.
Additionally, you may activate the following check boxes.

Phone Desired	The customer wishes to receive information etc. by phone. In this case, the customer's phone number needs to be stored in the database.
Mail Desired	The customer wishes to receive information etc. by mail. In this case, the customer's postal address needs to be stored in the database.
Corporate Customer	The customer is a corporate customer.
Email Desired	The customer wishes to receive information etc. via e-mail. In this case, the customer's e-mail address needs to be stored in the database.

Information	You may enter further information into the input fields available. All information stored will be displayed.

Change or add:

- The customer's home address on pressing **[Home Address]**.
- The customer's workplace address on pressing **[Working Address]**.
- An additional address on pressing **[Additional Address]**.
- The customer's assignment to a specific group on pressing **[Group]**.

Modify Customer – Group window

6) Press **[OK]** once you have entered or changed all information available.

The **Financing** window opens. The customer information entered or changed is stored in the customer database.

10.8.4   Customer Purchase

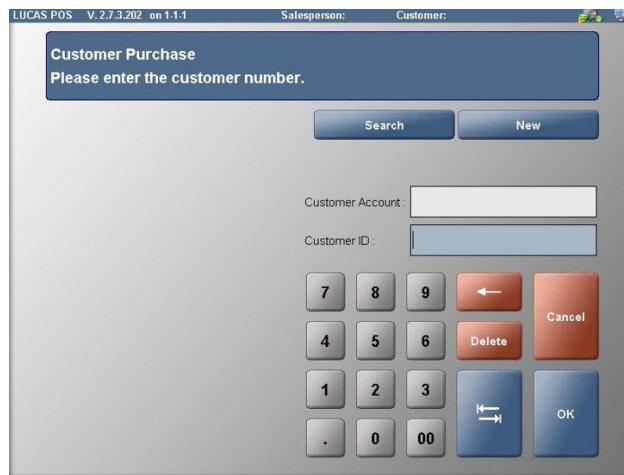Assign a receipt to a specific customer and save the receipt for the corresponding customer account.

1)   Press **[Customer Purchase]** within the **Customer** menu.

The **Customer Purchase** window opens.

Customer Purchase window

You may either enter the customer's ID or account, search the customer database for the particular customer, or create a new customer within the customer database.

The customer exists within the database.

1)   Scan the customer card. You may enter the information manually into the input fields and press **[OK]**.

2)   If the customer does not know their account number or customer ID, you can search for the customer (in this case, follow the steps described under *Customer Search* (see *above*)).

The **Financing** window opens. The customer ID is displayed in the header and all positions registered on the receipt are assigned to the customer.

Transaction window − customer ID

The customer does not yet exist in the database.

1) Press **[New]**.

The **New Customer − Main Data** window opens.

New Customer − Main Data window

2) Enter at least the customer's last name to create a new customer profile.

- Enter other information on the customer (optional, see chapter *9.6.2 New Customer*).

3) Press **[OK]** once you have entered all information available.

The customer is entered into the customer database, the **Financing** window opens. The customer ID is displayed in the header and all positions registered on the receipt are assigned to the customer.

Customer Search

If the customer already exists in the customer database but does not know his account number or customer ID, you may search for this information.

1) Press **[Search]** in the **Customer Purchase** window.

The **Search Customer − Customer Data** window appears.

Search Customer − Customer Data window

This window allows you to search the customer database for the customer who wishes to make a customer purchase.

2) Enter information on the customer into at least one of the input fields.

Use the asterisk key as a placeholder for any character strings.

If your till is not equipped with a keyboard use the *virtual keyboard* after pressing [AB].

3) Press **[Search]** to initiate the customer search.

The **Search Customer − Customer Selection** window opens.

Search Customer − Customer Selection window

All customer names along with their corresponding customer ID's found based on the search criteria entered are displayed in a list box.

- On selecting an entry the customer's address and phone number are displayed to the right.

 a) Press **[OK]** to select the customer who wishes to make a customer purchase.

The **Financing** window opens. The customer ID is displayed in the header and all positions registered on the receipt are assigned to the customer.

Transaction window − customer ID

> **NOTICE**
> Note that a customer can only be assigned to the current transaction. The following transactions will not be assigned to them. Call the **Deselect Customer** function to remove a customer from the current transaction.

10.8.5   Deselect Customer

If you have assigned the current transaction to a customer by calling the **Customer Purchase** function, you can use the **Deselect Customer** function to cancel it.

> **NOTICE**
> A customer needs to be assigned to the current transaction in order to call the **Deselect Customer** function.

1)   Press **[Deselect Customer]** within the **Customer** menu.

The customer purchase is cancelled. Items already registered and all subsequently registered items are no longer assigned to a customer.

10.8.6   Customer Gift Certificate

If the current transaction has been assigned to a specific customer, all unredeemed vouchers stored for this customer are displayed after calling the **Customer Gift Certificate** function. You may inform a customer on any unredeemed gift certificates which may also be refunded.

> **NOTICE**
> In order to execute the **Customer Gift Certificate** function you need to have called the **Customer Purchase** function through the customer search, not by entering the customer ID or their account information.

> **NOTICE**
> For refunding Gift Certificates which require validation a connection between the gift certificate server and the till must be established.
>
> - If the connection is not established an information message is displaying a code and your head office's phone number. Dial the number and state the code. The employee will be able to determine whether or not the voucher has been redeemed. If the voucher has not been redeemed yet you will be given a code to enable voucher re-turn.
> - Alternatively, a warning message might be displayed requesting your permission to

> proceed returning the voucher despite of the missing connection. Be aware that if you choose to return the voucher despite the missing connection there will always be a risk involved since there will not be any validation from the gift certificate server.

1) Press **[Customer Gift Certificate]** within the **Customer** menu.

The **Available Gift Certificates** window opens.
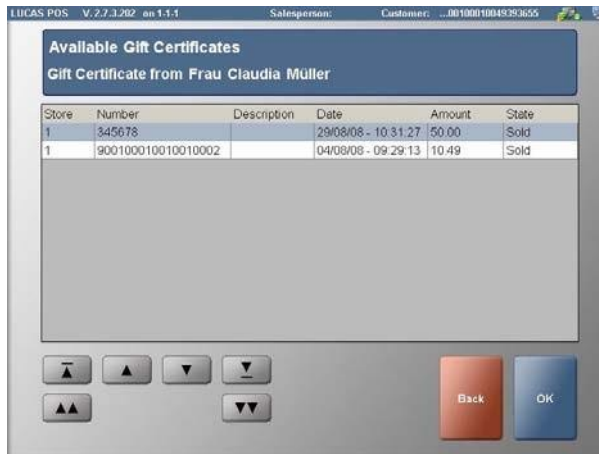
Available Gift Certificates window

Any unredeemed vouchers of the customer are displayed, including the following information.

Store	Store where the voucher was created at
Number	Voucher number
Description	Voucher type, e.g. Gift Voucher or Bonus Voucher
Date	Date the voucher was created
Amount	The voucher's value
State	Status of the voucher **sold**: The voucher has not yet been redeemed and can be returned.

• If the customer would like to return one of the vouchers, select the voucher and press **[OK]**.

The **Transaction** window opens. The voucher is returned, the voucher's value is transferred as a negative amount to the list of positions registered and deducted from the total amount. The voucher's value is paid to the customer or is offset against the current trans- action if the customer is making a purchase.

NOTICE

> If a connection to the gift certificate server could not be established and an authorisation through the head offics is not available the **Voucher Return** window opens. Enter the voucher's information and press **[OK]** to return the voucher.

• If the customer would not like to return a voucher press **[Back]**.

The **Financing** window opens without a voucher being returned.
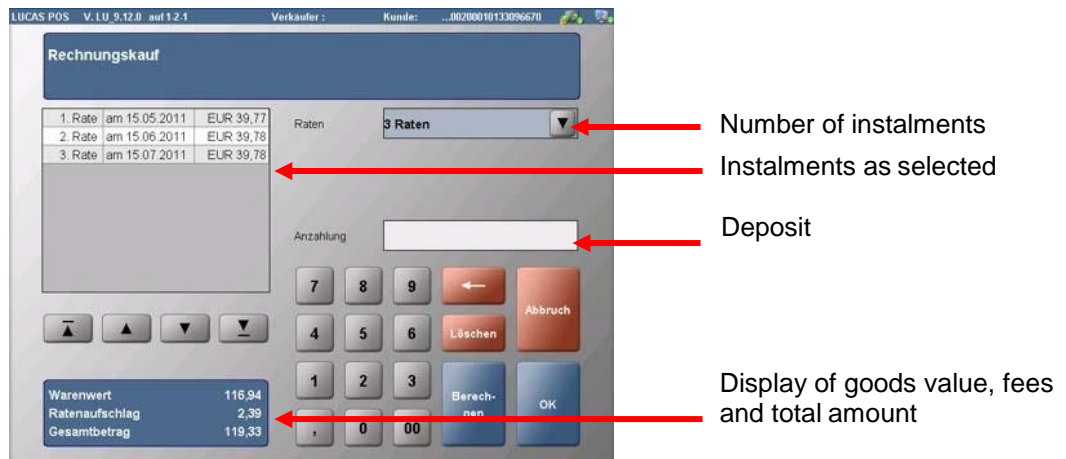
10.8.7 Deferred Payment

A customer may decide to split the amount due into several monthly payments.

1) Press **[Deferred Payment]** within the **Customer** menu.

The **Deferred Payment** window opens.

Number of instalments

Instalments as selected

Deposit

Display of goods value, fees and total amount

Deferred payment window

2) Select the number of instalments from the drop-down list box to the right.

The box in the upper left area will automatically display the instalments, including the respective due dates and their valid amounts.

The box in the lower left will display the total value of the goods, any additional costs and the total amount. Additional fees for deferred payments can be adjusted at the (C)SMS.

3) Press **[OK]** to conclude the transaction if the customer does not wish to make a payment right away.

However, if the customer wishes to make a first payment (deposit) on the goods, proceed as follows.

4) Enter the amount of the deposit into the **Deposit** entry field.

5) Press **[OK]**.

The **Financing** window opens.

6) Conclude the transaction.

The transaction will be partly financed through the deposit made. The remaining balance will be settled monthly as agreed.

10.8.8 Customer Related tenders

Please proceed as described in 10.3.8 Customer Card.

10.8.9 Customer Selection

A customer may want to take a selection of items home with them in order to decide which items to buy and which to return. The function **Customer Selections** only applies to registered customers. The selection will be stored in their customer profile. Once the customer has decided they will return the unwanted items and pay for the items they will keep.

10.8.10 NuBON – External Customer Code

The function **External Customer Code** is designed specifically for customers registered with the NuBON website. This function enables the issuing of digital receipts through use of a smartphone equipped with the respective NuBON App.

The NuBON website further offers central management of customer cards, coupons and plans to introduce a mobile payment solution in the future.

Information	In order to use this function the customer must register with NuBON and they must download the NuBON App. The App generates a QR-Code which is required at check out.
	Register: www.nubon.de

1) Register all of the customer's items for checkout.

2) Press **[Total]**.

3) Within the financing menu, press **[Customers]**.

4) Press **[External Customer Code]**.

The **Enter NuBON Code** window opens.

NuBON – Enter Code window

5) Please ask the customer for their NuBON QR code.

The code is generated by the NuBON App.

6) Scan or manually register QR code.

Information	Depending on the configuration your POS system may or may not allow for manual entry of QR code

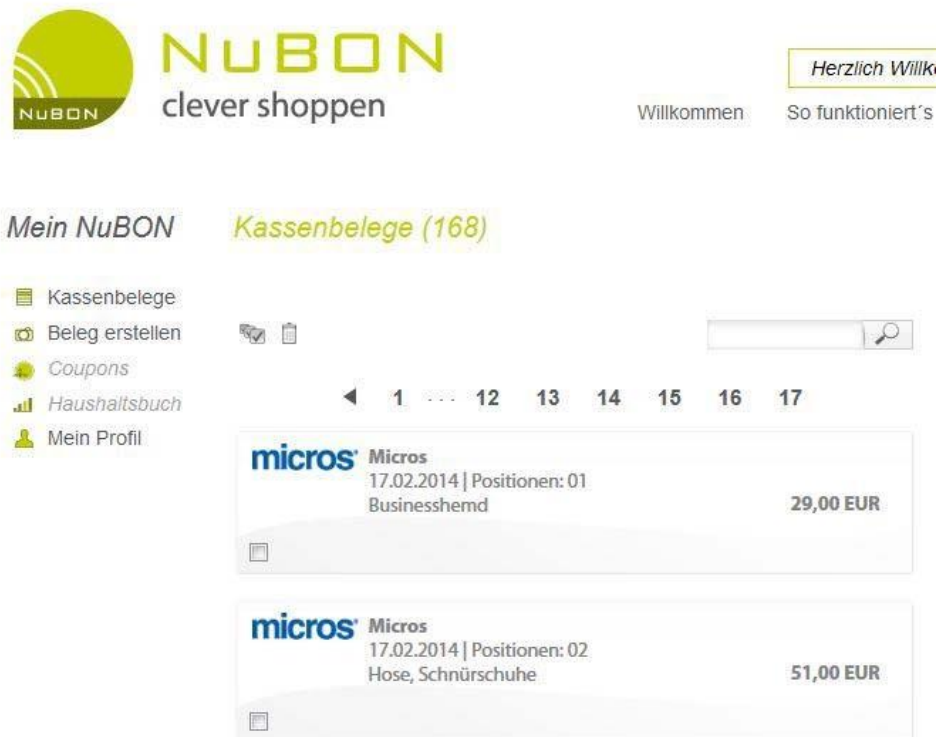| Information	Depending on the configuration of your POS system you may scan the code directly after pressing **[Total].**
	Only after scanning the QR code a message will appear stating the successful registry of the QR code. There will not be a message after manual registry!

7) Confirm by pressing **[OK]**.

You will be forwarded to the financing window. The transaction may now be financed with the tender of the customer's choice.

The transaction data will be transmitted to the head office and from there will be sent to the NuBON provider. A few seconds after the transaction was made the customer will be able to see their receipt in the NuBON App.

The customer may further view all their registered receipts once logged on to the app/website.

Information	NuBON – External customer code may be further customized within the CSMS properties.

NuBON

All receipts are listed. Details will be displayed after clicking a receipt.

10.9 External EFT

The **External EFT** functions offer further card payment options.

10.9.1 Visa

1) Press **[External EFT]** and select the pre-configured payment option **Visa**.

2) After inserting the VISA card into the EFT device, the **External EFT: Visa** window will open.

3) Enter the amount due and press **[OK]**.

Information ▸▸▸ | The customer will have to verify either through their PIN or by signing the receipt.

10.9.2 American Express

1) Press **[External EFT]** and select the pre-configured payment option **American Express**.

2) After inserting the American Express card into the EFT device, the **External EFT: American Express** window will open.

3) Enter the amount due and press **[OK]**.

Information ▸▸▸ | The customer will have to verify either through their PIN or by signing the receipt.

10.10   Invoice

In order to finance a transaction with an invoice payment, the customer must be registered and the transaction must be connected to their account. The transaction must already be in financing mode.

10.10.1   Invoice

1) Press **[Invoice]** within the **Invoice** menu.

    The amount due will be displayed.

2) Confirm amount with **[OK]**.

The invoice will be printed.