

Training Document

For

PRISM POS

INTEGRATED RETAIL

26, SIN MING LANE,
#04-114, MIDVIEW CITY,
SINGAPORE 573971.

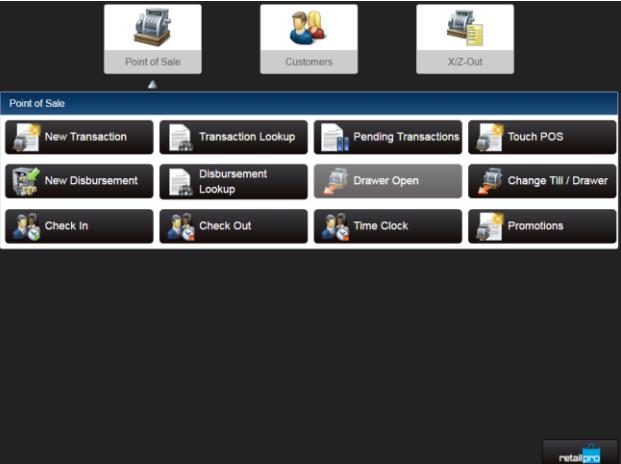
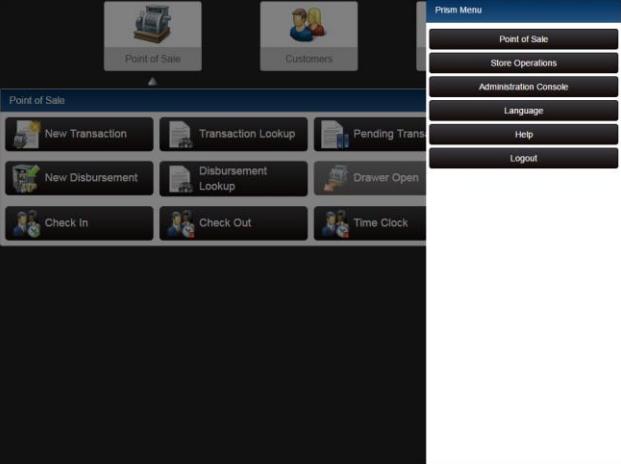
Tel: +65 8969 2150

Website: www.integratedretail.com

Table of Contents

Launching Prism/Login-Out	3
Open RegisterS	4
Item Lookup Modes	5
Using Item Lookup Modes to Lookup Items (Using Wildcards)	7
Using Advanced Item Lookup/Search to Lookup Items	9
Sales Transaction – No Customer/Cash	11
Sales Transaction – No Customer/Cash with Change	13
Sales Transaction – No Customer/Split Tender (Cash and Credit)	14
Sales Transaction – New Customer/Cash	15
Sales Transaction – Existing Customer/Cash	16
Return a Transaction	17
Returning One Item Using Item Type: Return (Option 1)	19
Returning Merchandise Using Item Type: Return (Option 2)	21
Exchanging Merchandise Using Transaction Type: Return	23
Item-Level Discounts.....	25
Transaction-Level Discounts	27
Holding and Un-Holding a Transaction.....	30
Close Register	32

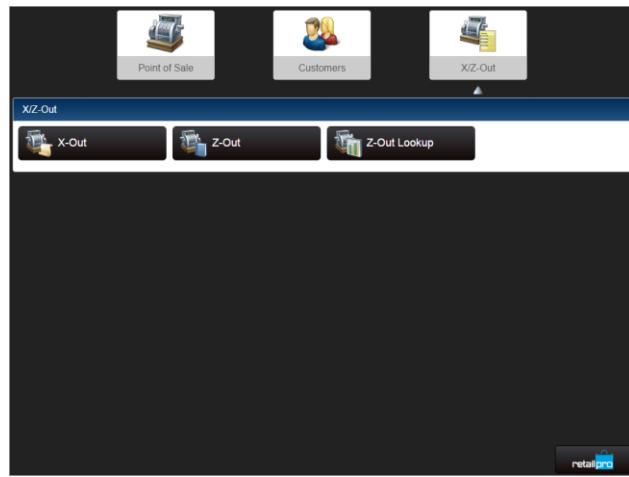
Launching Prism/Login-Out

<ol style="list-style-type: none">1. On the desktop, click the “Retail Pro Proxy 8080” shortcut<ul style="list-style-type: none">▪ This will launch the Prism Proxy using port 80802. By default, this will also launch the default web browser and connect to the defined Prism Server3. On the login screen, enter a username and password provided for you.	
4. Click the “Retail Pro” button	
5. Click the “Logout” button	

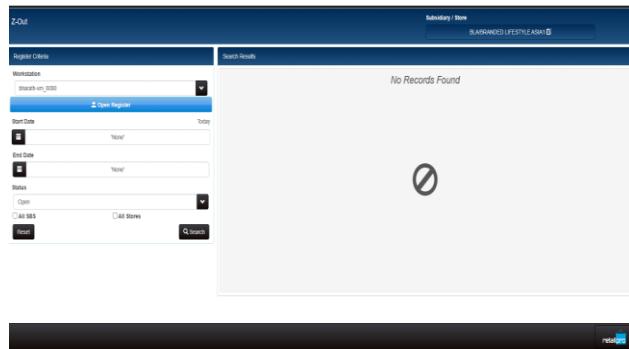
Open Register

For this demonstration, you are starting with a \$1000 float amount (in the register at the beginning of the day).

- From the Point of Sale > X/Z-Out area, click the “Z-Out” button



- Click the “Open Register” button

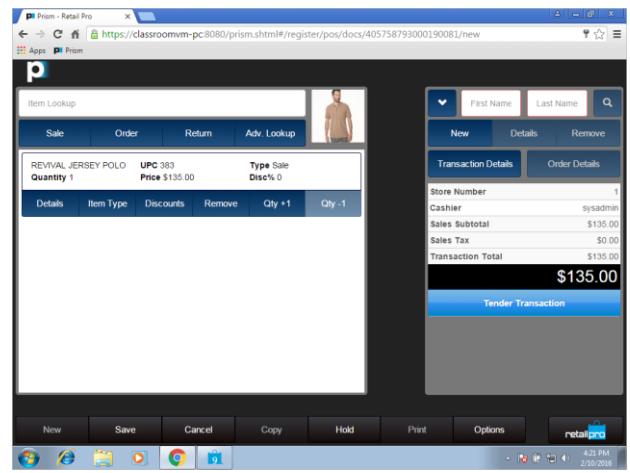


- Enter the Currency Media Counts that becomes \$1000
- Click the “Next” button
- A message displays that Register is opened.

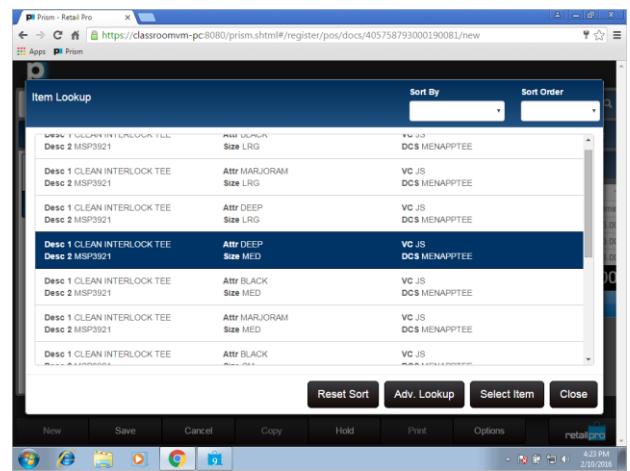
A screenshot of the 'Register' setup page. On the left, there's a 'Currencies' section with a dropdown set to 'SGD - Singapore Dollar' and a total of '\$1,000.00'. Below it are 'Cash Total' and 'Grand Total' fields, both showing '\$1,000.00'. On the right, there's a table titled 'Currency Media Counts SGD - Singapore Dollar'. The table lists various denominations and their counts: 1000 Dollar (Count: 1), 500 Dollar (Count: 1), 100 Dollar (Count: 2), 50 Dollar (Count: 7), 20 Dollar (Count: 12), 10 Dollar (Count: 10), 5 Dollar (Count: 10), 2 Dollar (Count: 20), 1 Dollar (Count: 20), 50 Cent (Count: 1), 25 Cent (Count: 1), and 10 Cent (Count: 1). There are also 'Enter Denominations' and 'Enter Totals' buttons. The bottom of the screen has 'Cancel' and 'Next' buttons.

Item Lookup Modes

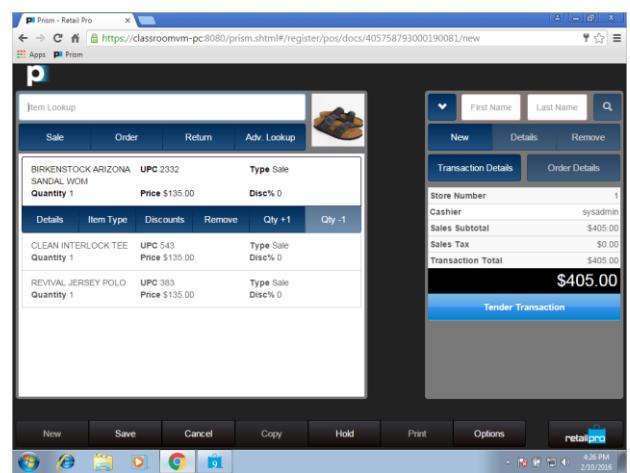
1. Browse to the Point-of-Sale module and create a new transaction.
2. In the Item Lookup field, enter the Item barcode.
Eg: 13229330083



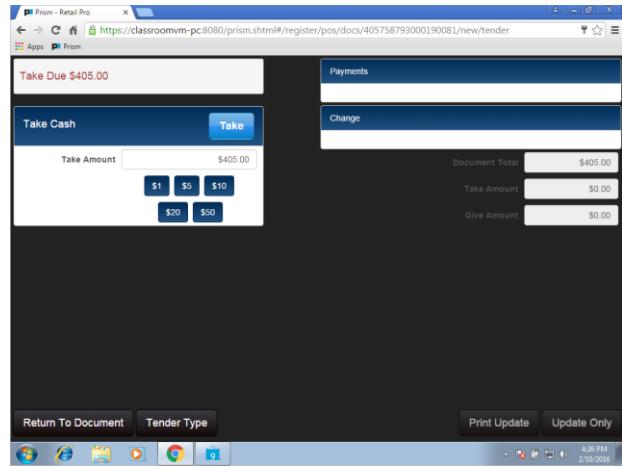
3. In the Item Lookup field, enter the following information to lookup an item using Item Description or Product Code.
Eg: "DinoBot T-Shirt"
"13-329-332-46"
A list of matching items appears.
4. Choose an item and click the "Select Item" button



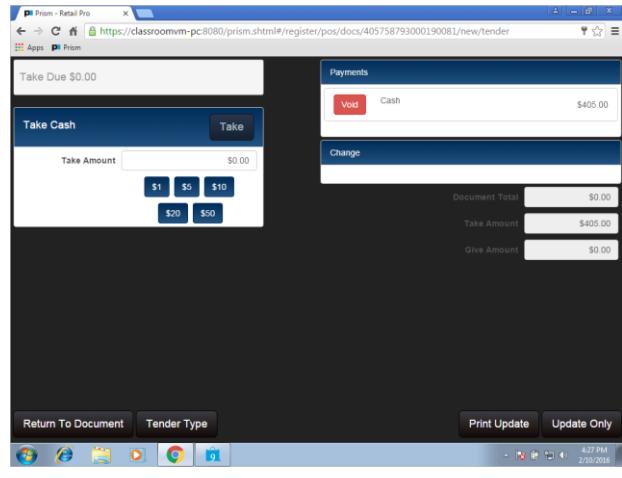
5. Click the "Tender Transaction" button



6. Click the “Take” button

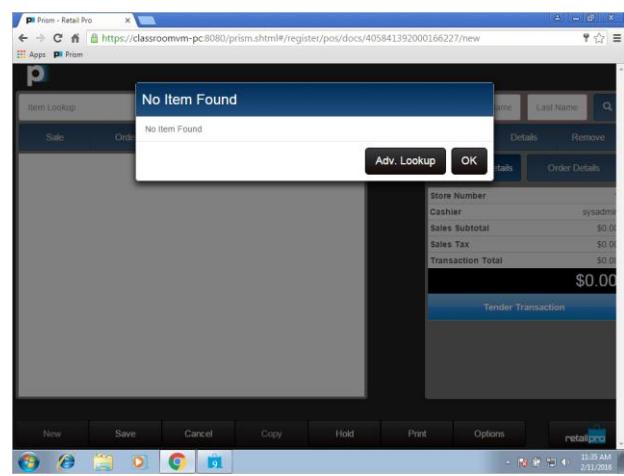


7. Click the “Print Update” button

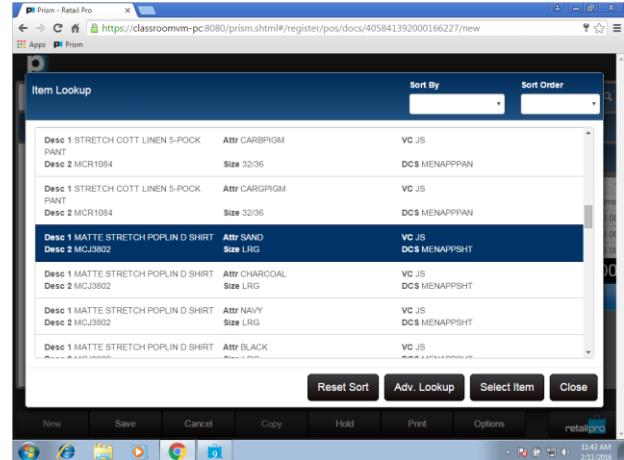


Using Item Lookup Modes to Lookup Items (Using Wildcards)

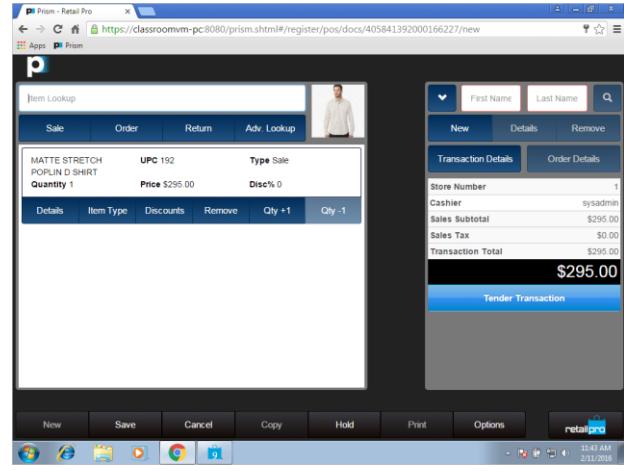
1. There are a number of items with the word "DRESS" in the Product Description field. In the Item Lookup field, enter "DRESS" and press <Enter>
 - An error message appears.
2. Click "OK" on the error dialog that appears



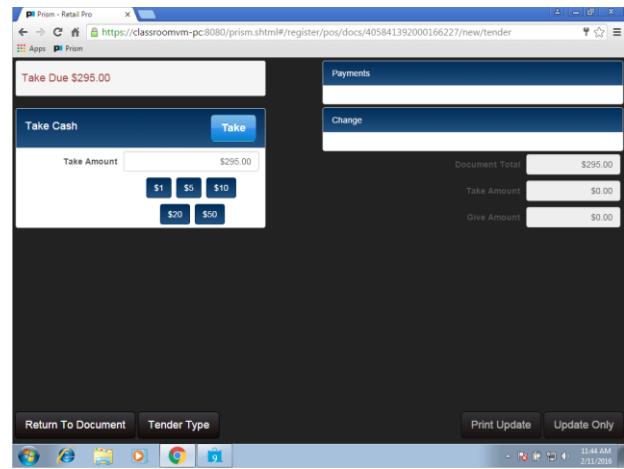
3. In the Item Lookup field, enter "*DRESS*" and press <Enter>
 - A list of matching items appears.
4. In the results section, click on an item to select it and then click the "Select Item" button



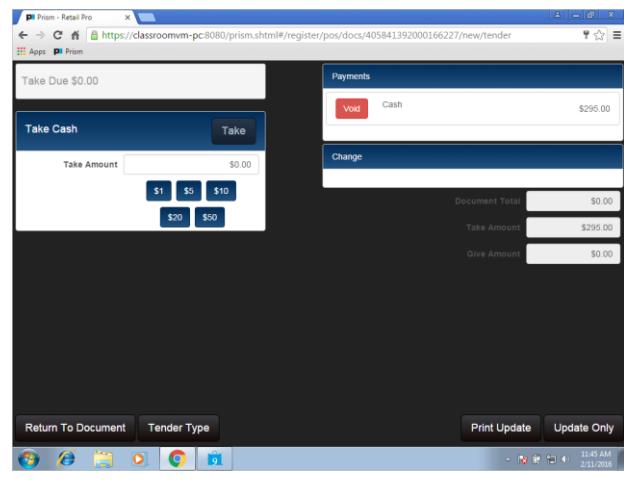
5. The item is now listed on the transaction.
6. Click the "Tender Transaction" button



7. Click the “Take” button

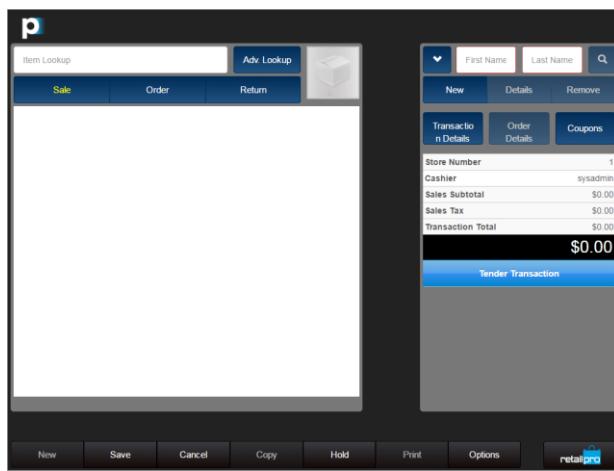


8. Click the “Print Update” button

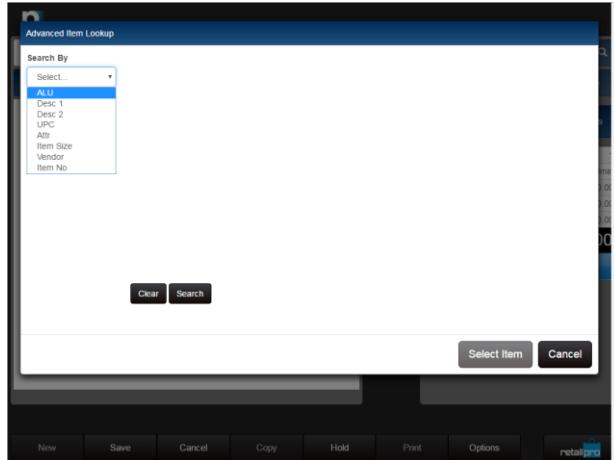


Using Advanced Item Lookup/Search to Lookup Items

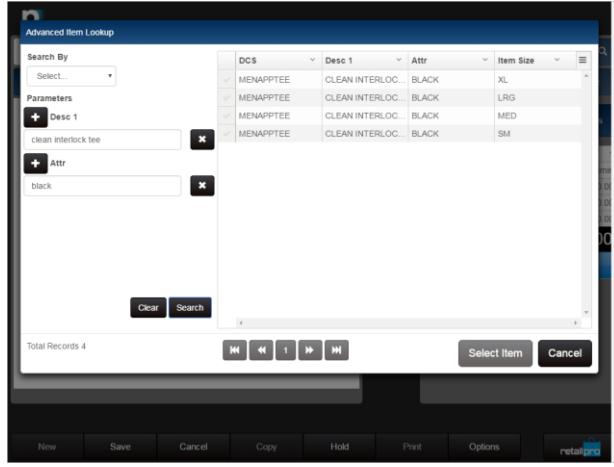
1. Browse to the Point of Sale module and create a new transaction
2. Click the “Search” button



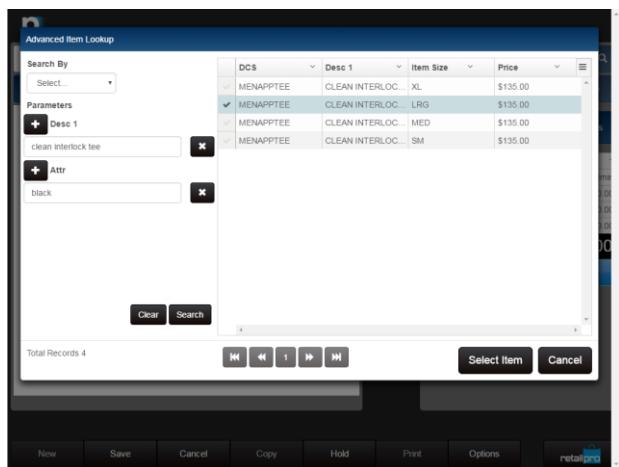
3. For the “Search By” field, choose the appropriate option, such as “Description2”



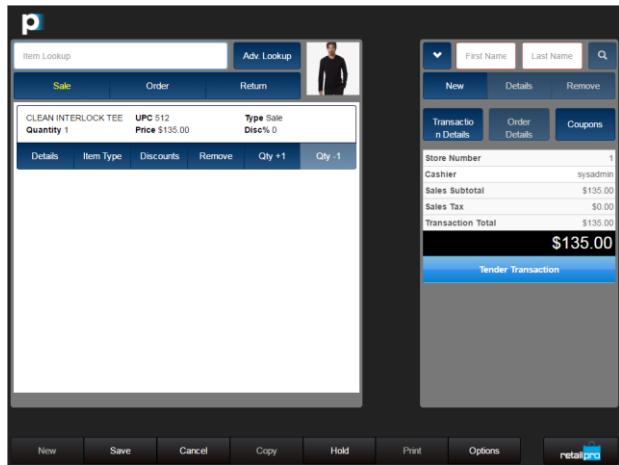
4. Enter “Dress” for the Description 2 and select the “Contains” option from the drop down.
5. Click on the Search button.



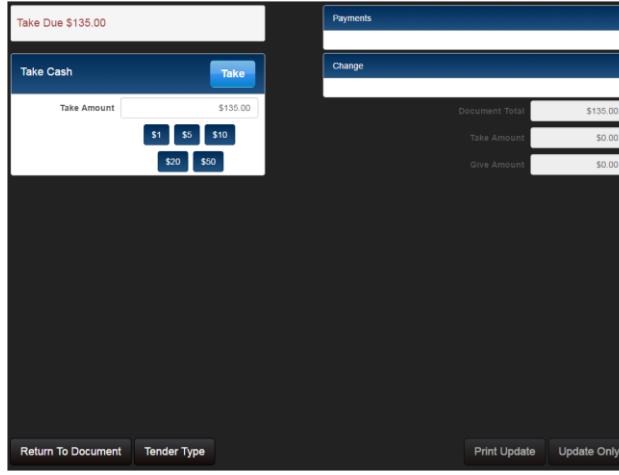
6. In the results section, click on an item to select it and then click the “Select Item” button



7. The item is now listed on the transaction
8. Click the “Tender Transaction” button



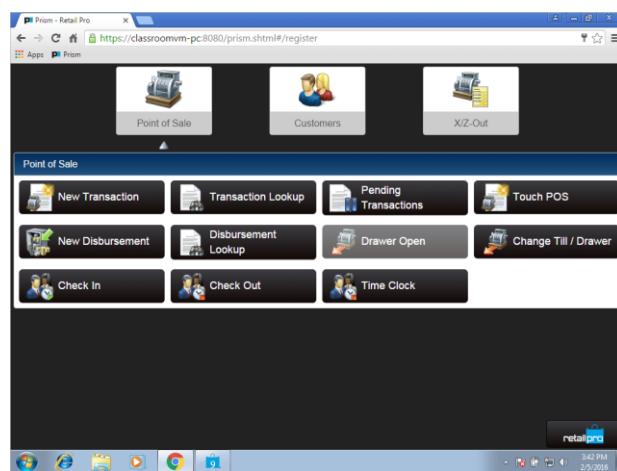
9. Click the “Take” button



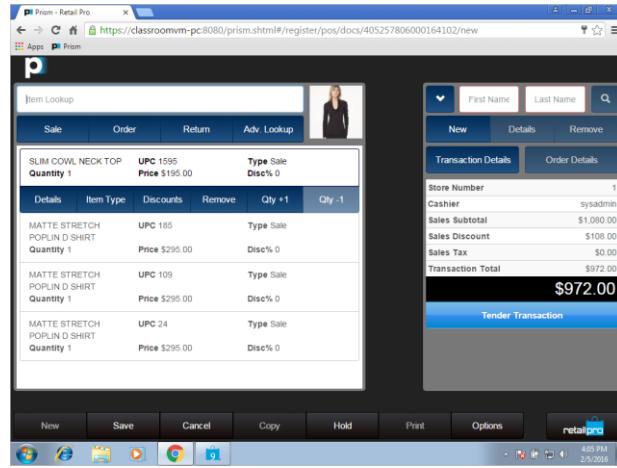
10. Click the “Print Update” button

Sales Transaction – No Customer/Cash

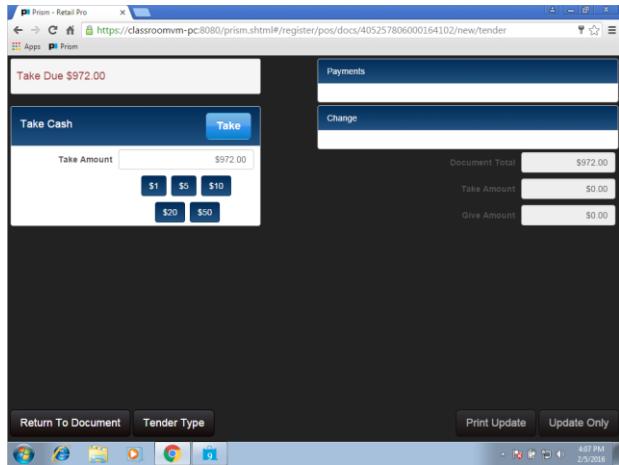
1. From the POS home screen, click the “New Transaction” button



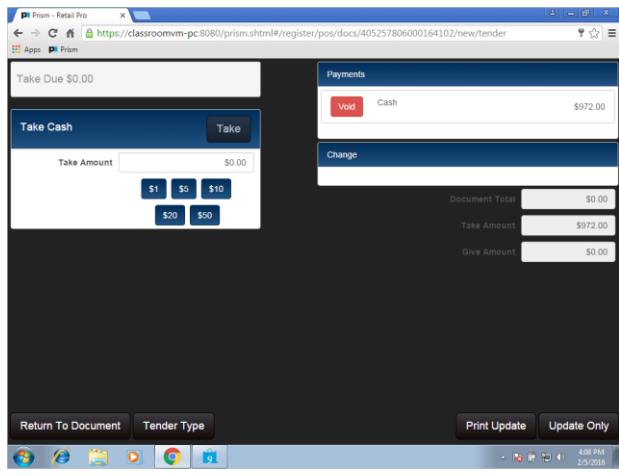
2. In the “Item Lookup” field, scan the barcodes of the Items.
3. Click the “Tender Transaction” button



4. Click the “Take” button to take the exact amount due in cash



5. Click the “Print Update” button to complete the transaction.



Sales Transaction – No Customer/Cash with Change

1. Create a new transaction and list a few items
2. Click the “Tender Transaction” button

The screenshot shows the Prism Retail Pro software interface. In the center, there's a "Transaction Details" section with a summary table. The total sales subtotal is \$531.00. Below this, a large blue button labeled "Tender Transaction" is visible. At the bottom of the screen, there are standard Windows taskbar icons.

3. Manually enter a “Take Amount” that exceeds the due amount
4. Click the “Take” button to take that amount in cash.

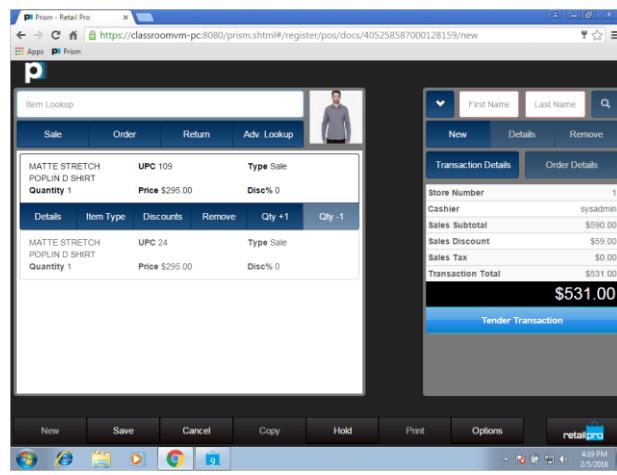
This screenshot shows the "Take Cash" screen. A "Take Amount" of \$600.00 is entered. On the right, the "Payments" section shows a "Document Total" of \$531.00 and a "Take Amount" of \$0.00. The "Change" section shows a "Give Amount" of \$0.00. The bottom of the screen has buttons for "Return To Document", "Tender Type", "Print Update", and "Update Only".

5. Click the “Give” button to give change back in cash.
6. Click the “Print Update” button to complete the transaction.

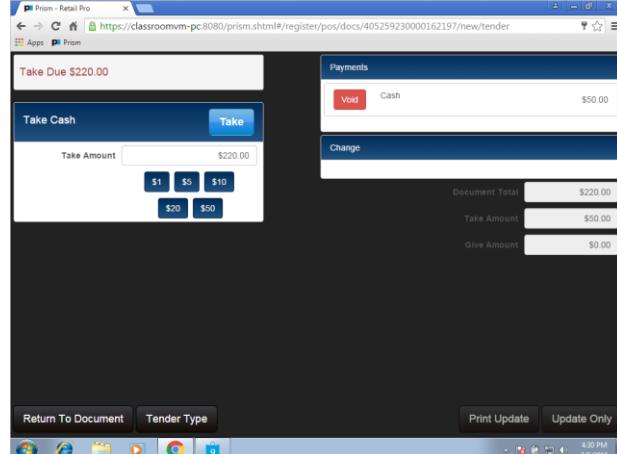
This screenshot shows the "Give Cash" screen. A "Give Amount" of \$69.00 is entered. On the right, the "Payments" section shows a "Document Total" of \$69.00, a "Take Amount" of \$600.00, and a "Give Amount" of \$0.00. The "Change" section shows a "Give Amount" of \$0.00. The bottom of the screen has buttons for "Return To Document", "Tender Type", "Print Update", and "Update Only".

Sales Transaction – No Customer/Split Tender (Cash and Credit)

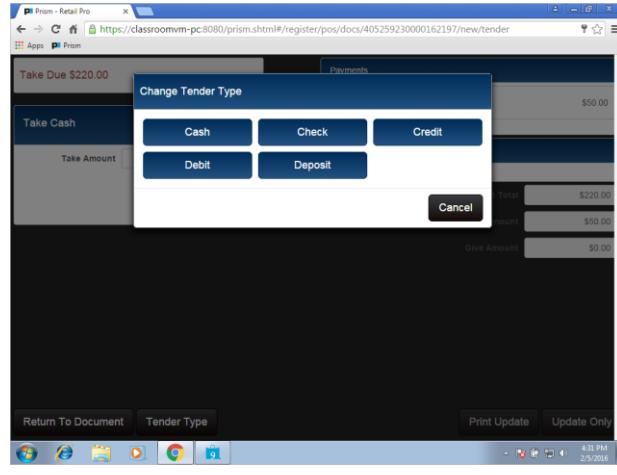
1. Create a new transaction and list a few items
2. Click the “Tender Transaction” button



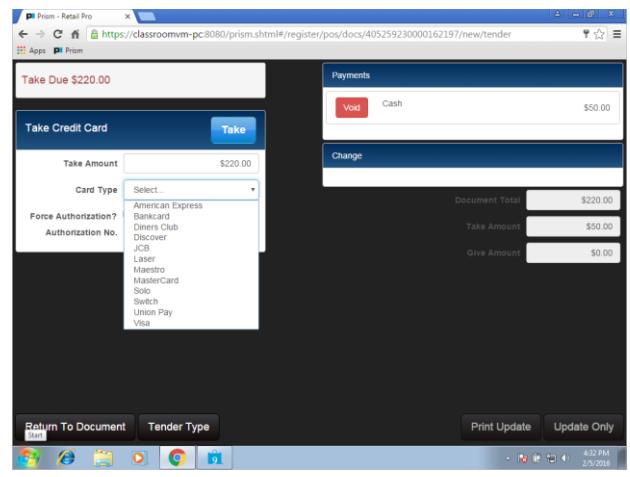
3. Manually enter a “Take Amount” that is less than the due amount
4. Click the “Take” button
5. Click the “Tender Type” button



6. Click the “Credit Card” option from the drop down to take the remaining balance using a credit card

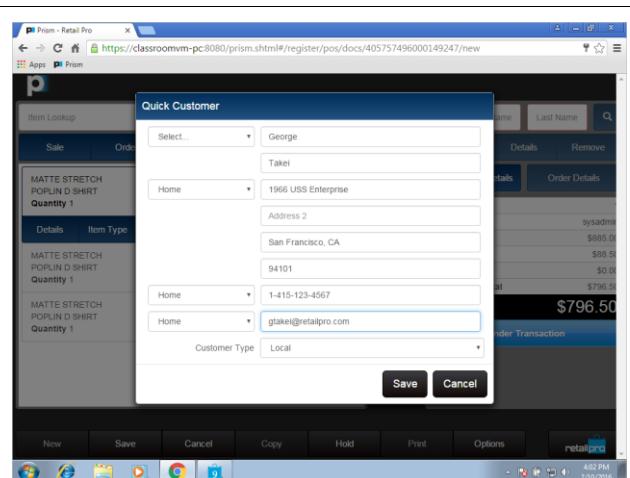


7. Select a “Card Type”
8. Click the “Take” button
9. Click the “Print Update” button to complete the transaction

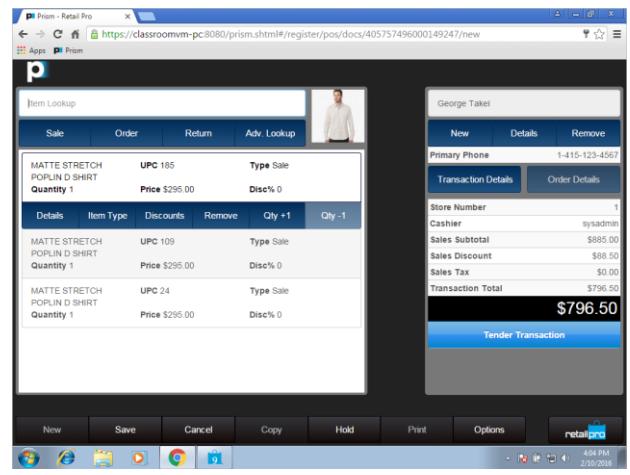


Sales Transaction – New Customer/Cash

1. Create a new transaction and list a few items
2. Click the “New” customer button
 - Enter all relevant customer information
3. Click “Save” when done

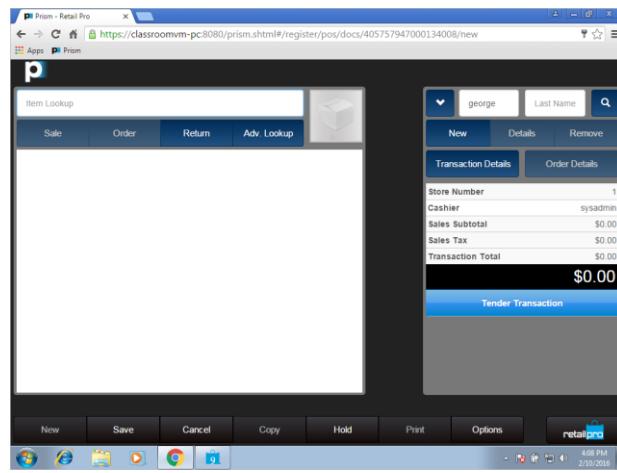


4. Click the “Tender Transaction” button
5. Click the “Take” button to take the exact amount due in cash
6. Click the “Print Update” button to complete the transaction.

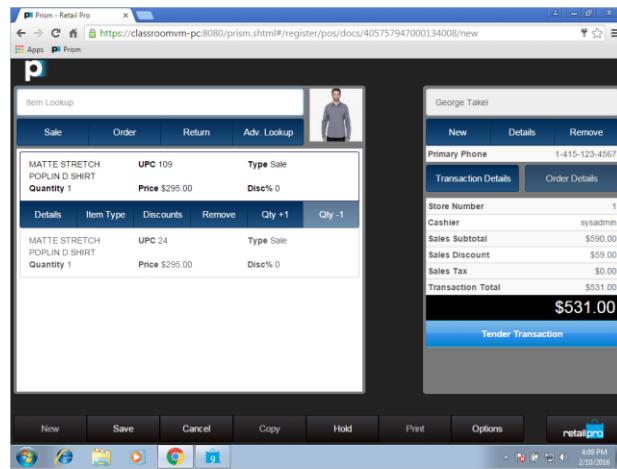


Sales Transaction – Existing Customer/Cash

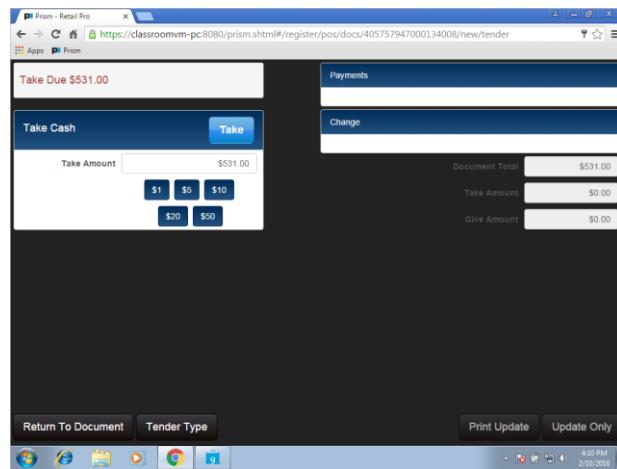
1. Create a new transaction
2. Enter the first or last name of the customer (created earlier) and click the “Search” button



3. List a few items
4. Click the “Tender Transaction” button



5. Click the “Take” button to take the exact amount due in cash.
6. Click the “Print Update” button to complete the transaction.



Return a Transaction.

1. In the POS area, create a new transaction
2. List a few items
3. Tender/update the transaction

The screenshot shows a POS transaction screen. At the top, there are buttons for 'Item Lookup' and 'Adv. Lookup'. Below that, a navigation bar has 'Sale' selected, followed by 'Order' and 'Return'. A small image of a person is displayed. On the right, there's a search bar for 'First Name' and 'Last Name' with a magnifying glass icon. Below the search bar are buttons for 'New', 'Details', and 'Remove'. A 'Transaction Details' section shows the store number (1), cashier (sysadmin), sales subtotal (\$785.00), sales tax (\$0.00), and transaction total (\$785.00). The tender amount is listed as '\$785.00' under 'Tender Transaction'. At the bottom, there are buttons for 'New', 'Save', 'Cancel', 'Copy', 'Hold', 'Print', and 'Options'.

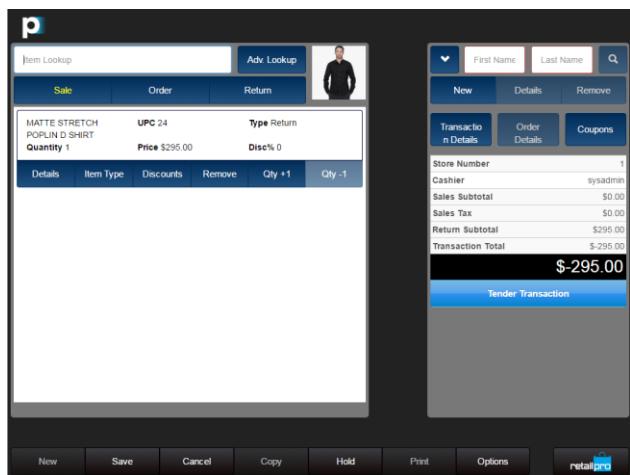
4. On a new transaction, click the "Return" button and choose the "Search for Receipt" option

This screenshot shows the same POS interface as the previous one, but the transaction details screen is now empty. It features a receipt icon instead of item details. Buttons for 'Set Item Type' and 'Search For Receipt' are visible. The transaction summary at the bottom shows a total of '\$0.00'.

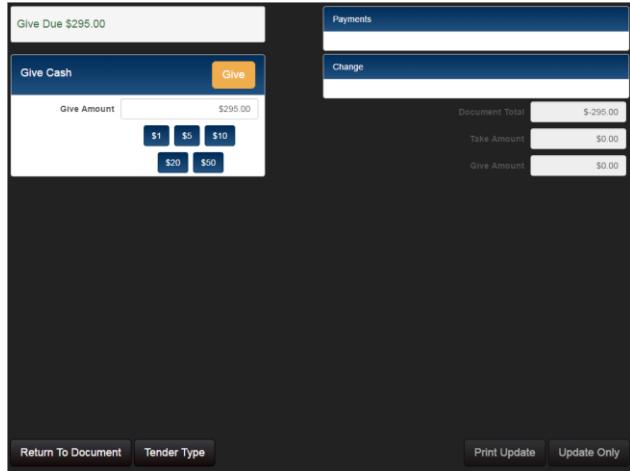
5. In the "Transaction Filter" area, specify today as the "From Date" and "To Date" and then click the "Search" button
6. In the "Transactions" area, select the original transaction
7. In the "Transaction Items" area, select the item being returned and then click the "POS – Return Item" button
8. Choose the "Return Reason"
9. Finally, click on the "Return To Document" button

The screenshot displays three main sections. On the left, the 'Transaction Filter' dialog is open with 'From Date' and 'To Date' both set to 'Mar 25, 2016 12:00:01 AM' and 'Mar 25, 2016 11:59:59 PM'. It also includes fields for 'Document No.' and 'Customer Last Name'. In the center, the 'Transactions' list shows several entries, with 'Transaction No. 26' highlighted. This entry is for a customer created on Mar 25, 2016, with a total of \$785.00. On the right, the 'Transaction Items' list shows two items: 'UPC: 24 MATTE STRETCH POPLIN D SHIRT' and 'UPC: 1595 SLIM COWL NECK TOP'. Both items have a quantity of 1 and a price of \$295.00. The 'Return Reason' dropdown is set to 'DAMAGE'. At the bottom, there are buttons for 'POS - Return Item', 'Clear Item', 'Select All', 'Clear All', and 'Return To Document'.

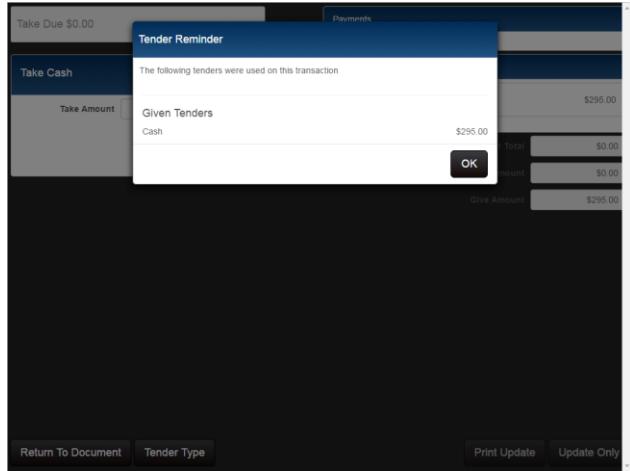
10. Click the “Tender Transaction” button



11. Click the “Give” button to give change back in cash.
12. Click the “Update” button to complete the return.

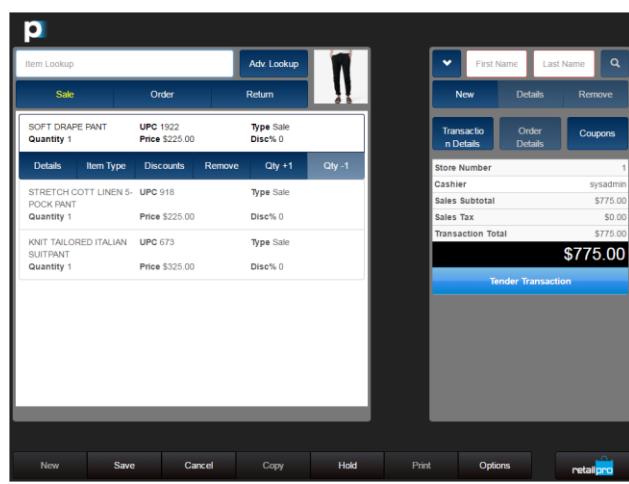


13. Click “OK” on the “Tender Reminder” window

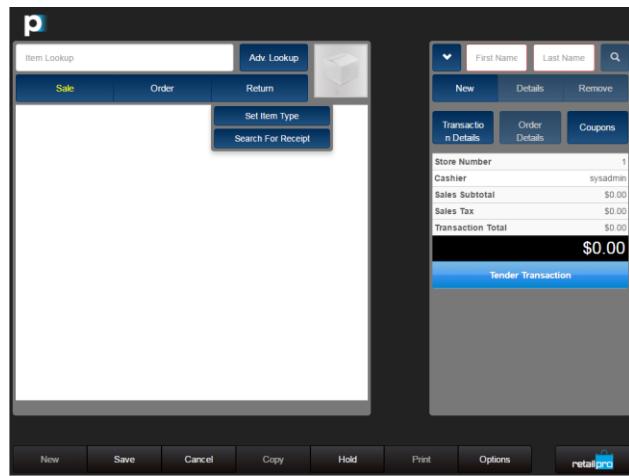


Returning One Item Using Item Type: Return (Option 1)

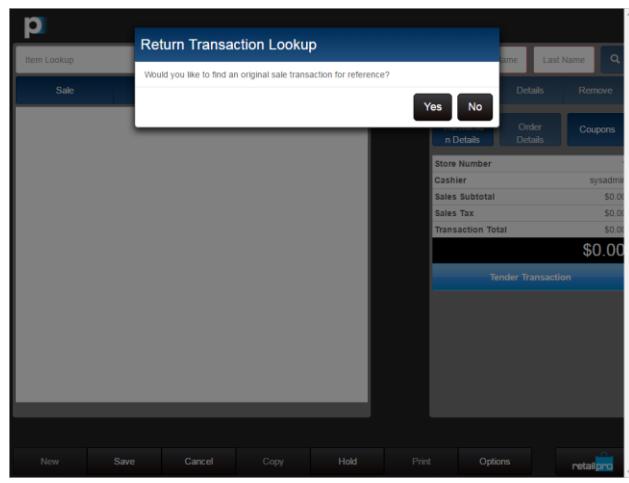
1. In the POS area, create a new transaction
2. List a few items
3. Tender/update the transaction



4. On a new transaction, click the "Return" button and choose the "Set Item Type" option



5. List one of the items purchased earlier
6. Click the "Yes" option to reference the original transaction



7. In the “Transaction Filter” area, specify today as the “From Date” and “To Date” and then click the “Search” button
8. In the “Transactions” area, select the original transaction
9. In the “Transaction Items” area, select the item being returned and then click the “POS – Return Item” button
10. Choose the “Return Reason”
11. Finally, click on the “Return To Document” button

The screenshot shows the POS software interface. In the top left, the "Transaction Filter" section has "From Date" set to "Mar 25, 2016 12:00:01 AM" and "To Date" set to "Mar 25, 2016 11:59:59 PM". Below it are fields for "Document No." and "Customer Last Name". At the bottom are "Search" and "Reset" buttons. To the right, the "Transactions" section displays "Transaction No. 28" with a total of "\$775.00", the "Customer" (Created Date Mar 25, 2016 2:52:10 PM), and a "Select the transaction with items to be returned" button. The bottom right of this section has "Return To Document". The middle section, "Transaction Items", lists an item: "KNIT TAILORED ITALIAN SUITPANT" (UPC 673) with a quantity of 1, price of \$325.00, and size 32/34. The "Return Qty" is set to 0. The "Return Reason" is "DAMAGE". At the bottom are buttons for "POS - Return Item", "Clear Item", "Select All", "Clear All", and "Return To Document".

12. Click the “Tender Transaction” button

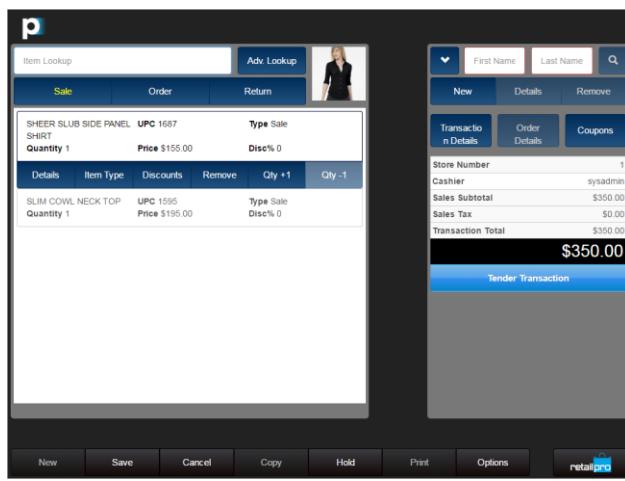
The screenshot shows the "Tender Transaction" screen. It features a header with "Item Lookup" and "Adv. Lookup" buttons. Below is a navigation bar with "Sale", "Order", and "Return" tabs, where "Sale" is selected. A central panel shows a product image of a suit pant and details: "KNIT TAILORED ITALIAN" (UPC 673), "SUITPANT", "Quantity 1", "Price \$325.00", and "Disc% 0". Below this are buttons for "Details", "Item Type", "Discounts", "Remove", "Qty +1", and "Qty -1". To the right, a sidebar shows transaction details: "Store Number 1", "Cashier sysadmin", "Sales Subtotal \$0.00", "Sales Tax \$0.00", "Return Subtotal \$325.00", and "Transaction Total \$-325.00". At the bottom are buttons for "New", "Save", "Cancel", "Copy", "Hold", "Print", "Options", and the "retailpro" logo.

14. Click the “Give” button to give change back in cash
15. Click the “Update” button to complete the return
16. Click “OK” on the “Tender Reminder” window

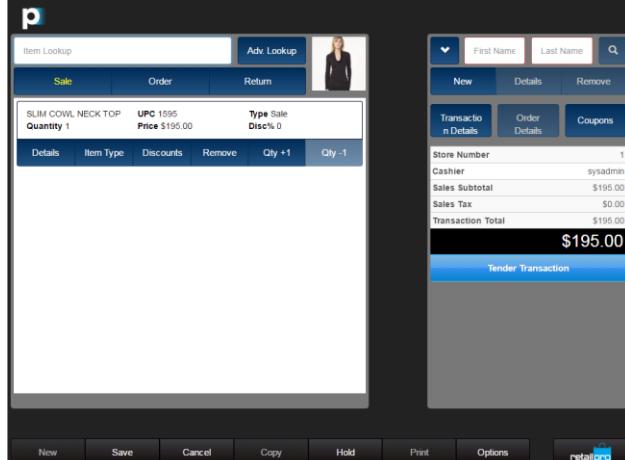
The screenshot shows the "Give Due \$325.00" and "Payments" sections. The "Give Cash" section on the left has a "Give Amount" input set to \$325.00 and buttons for selecting dollar amounts (\$1, \$5, \$10, \$20, \$50). To the right, the "Payments" section shows "Document Total \$-325.00", "Take Amount \$0.00", and "Give Amount \$0.00". At the bottom are buttons for "Return To Document", "Tender Type", "Print Update", and "Update Only".

Returning Merchandise Using Item Type: Return (Option 2)

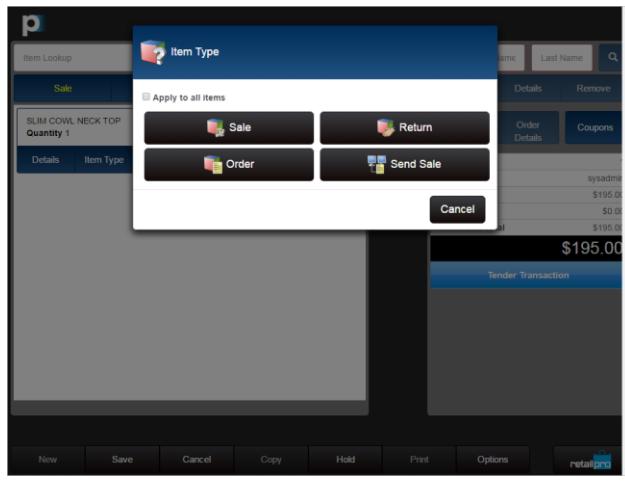
1. In the POS area, create a new transaction
2. List a few items
3. Tender/update the transaction



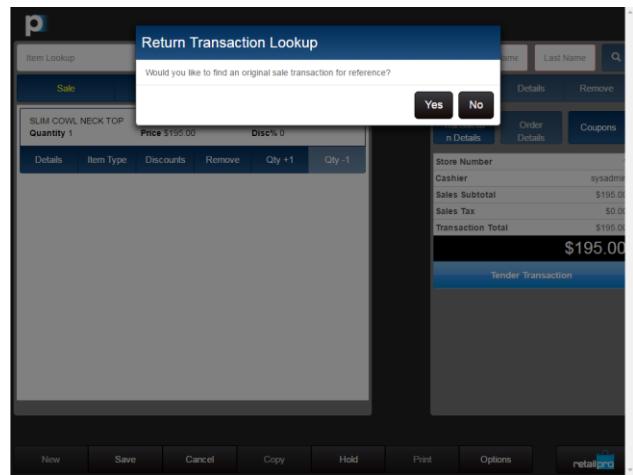
4. On a new transaction, list one of the items purchased earlier
5. Click the "Item Type" button



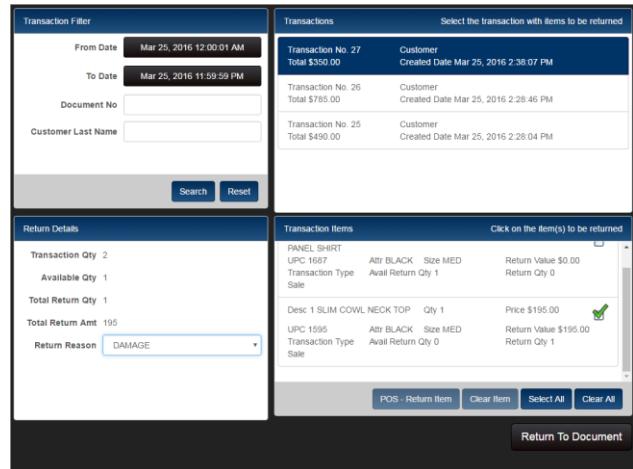
6. Click the "Return" button



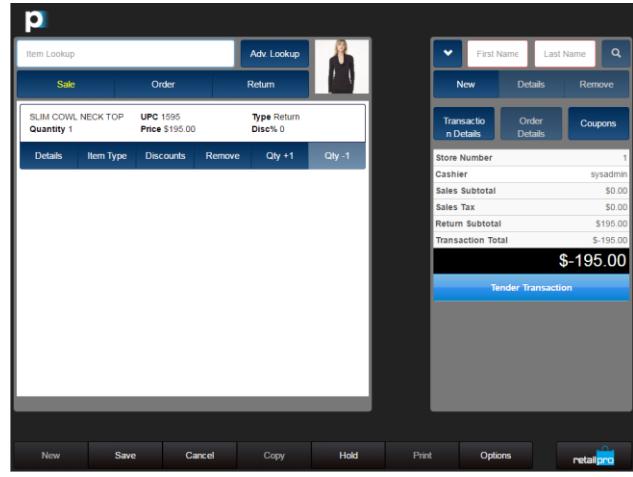
7. Click the “Yes” option to reference the original transaction



8. In the “Transaction Filter” area, specify today as the “From Date” and “To Date” and then click the “Search” button
 9. In the “Transactions” area, select the original transaction
 10. In the “Transaction Items” area, select the item being returned and then click the “POS – Return Item” button
 11. Choose the “Return Reason”
 12. Finally, click on the “Return To Document” button



13. Click the “Tender Transaction” button



14. Click the “Give” button to give change back in cash
15. Click the “Update” button to complete the return
16. Click “OK” on the “Tender Reminder” window

The screenshot shows a POS system interface. On the left, a 'Give Cash' window is open with a 'Give Amount' field set to '\$195.00'. Below it are buttons for '\$1', '\$5', '\$10', '\$20', and '\$50'. To the right, a 'Payments' summary window displays the following data:

Document Total	\$195.00
Take Amo	\$0.00
Give Amo	\$0.00

At the bottom of the screen are buttons for 'Return To Document', 'Tender Type', 'Print Update', and 'Update Only'.

Exchanging Merchandise Using Transaction Type: Return

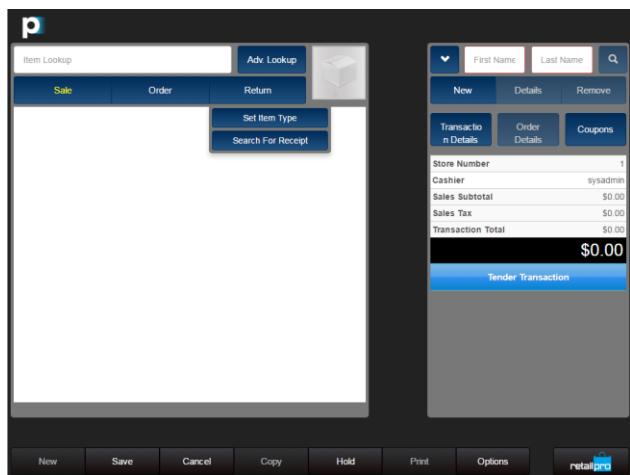
1. In the POS area, create a new transaction
2. List some articles
3. Tender/update the transaction

The screenshot shows a POS system interface. On the left, a transaction list displays a single item: 'MATTE STRETCH POPLIN D SHIRT' with 'UPC 222' and 'Type Sale'. The price is listed as '\$295.00'. On the right, a 'Tender Transaction' screen shows the following details:

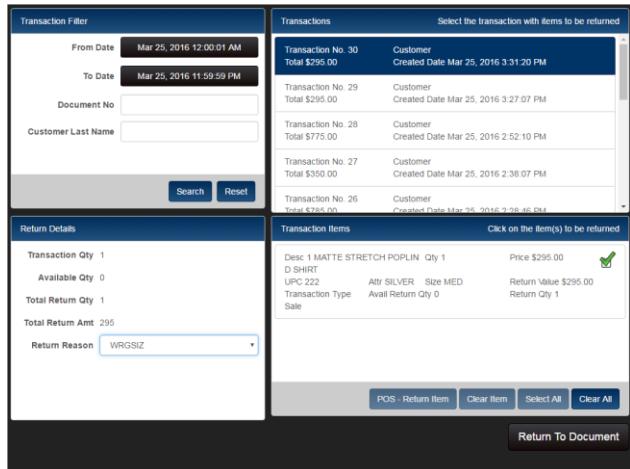
Store Number	1
Cashier	sysadmin
Sales Subtotal	\$295.00
Sales Tax	\$0.00
Transaction Total	\$295.00

A large blue button at the bottom right says 'Tender Transaction'. At the bottom of the screen are buttons for 'New', 'Save', 'Cancel', 'Copy', 'Hold', 'Print', and 'Options'.

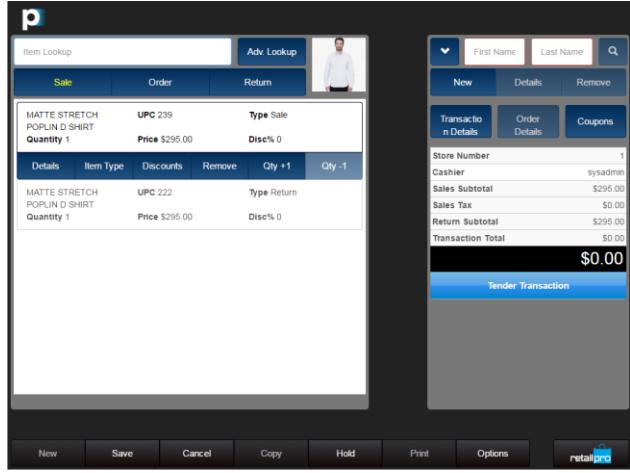
4. On a new transaction, click the “Return” button and choose the “Search for Receipt” option



5. In the “Transaction Filter” area, specify today as the “From Date” and “To Date” and then click the “Search” button
 6. In the “Transactions” area, select the original transaction
 7. In the “Transaction Items” area, select the item being returned and then click the “POS – Return Item” button
 8. Choose the “Return Reason”
 9. Finally, click on the “Return To Document” button



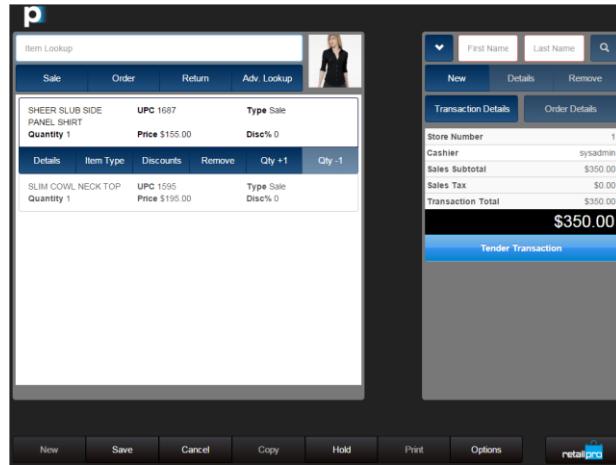
10. List the exchange articles.
 11. Click the “Tender Transaction” button
 12. Click the “Print Update” button to complete the transaction



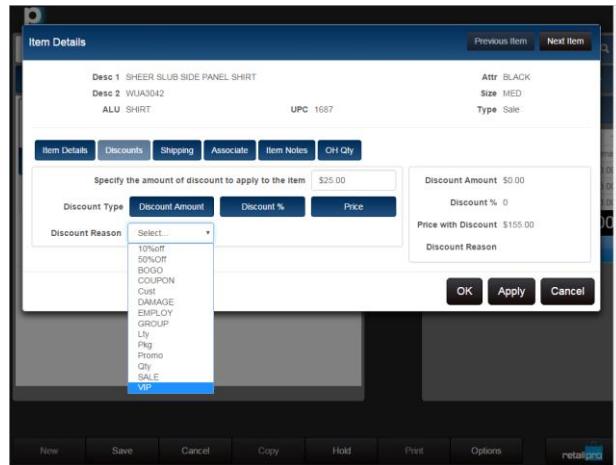
Item-Level Discounts

Assigning a Discount Amount

1. In the Point of Sale module, create a new transaction
2. List some items
3. For one item, click the “Discounts” button



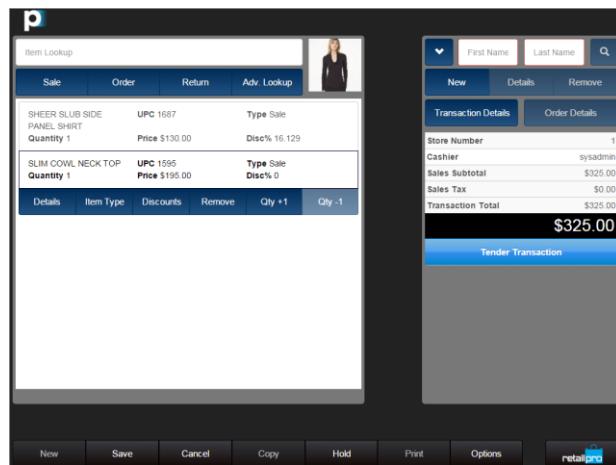
4. In the “Item Details” window, you are taking directly to the “Discounts” tab. Enter “25\$” into the discounts amount field.
5. Click the “Discount Amount” button
6. Choose the discount reason
7. Click “OK” to close the “Items Details” window



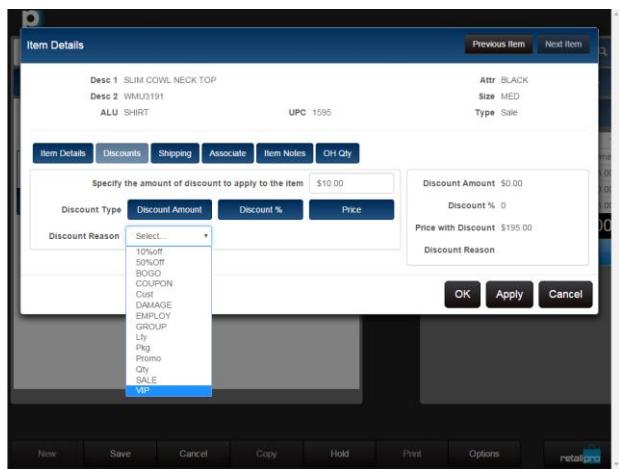
8. Note that the discount information is displayed for the item

Assigning a Discount Percentage

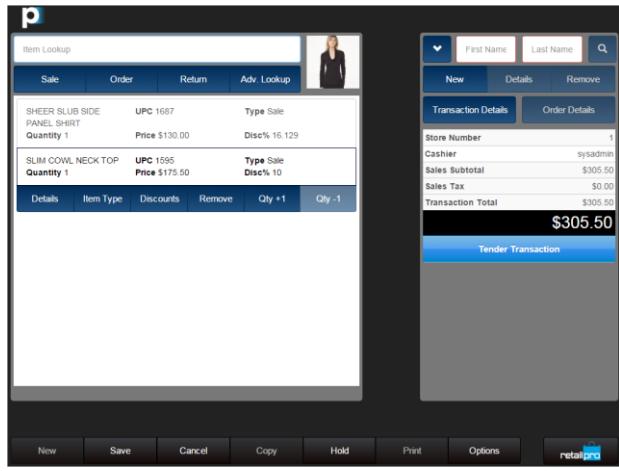
9. Click on the other item
10. Click the “Discounts” button



11. In the “Item Details” window, you are taking directly to the “Discounts” tab. Enter “10” into the discounts amount field.
12. Click the “Discount %” button
13. Choose the discount reason
14. Click “OK” to close the “Items Details” window



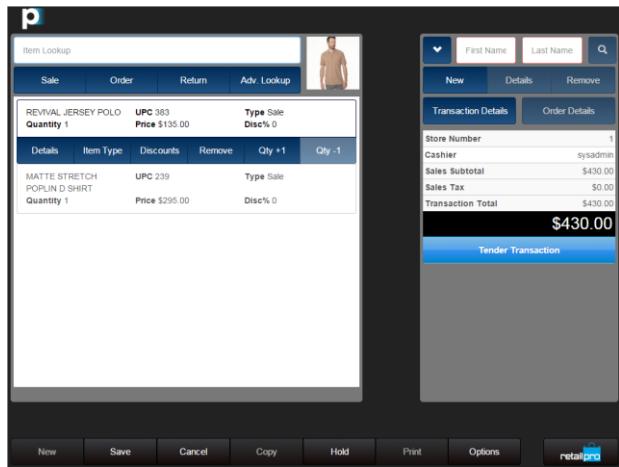
15. Note that the discount information is displayed for the item
16. Click the “Tender Transaction” button
17. Click the “Print Update” button to complete the transaction



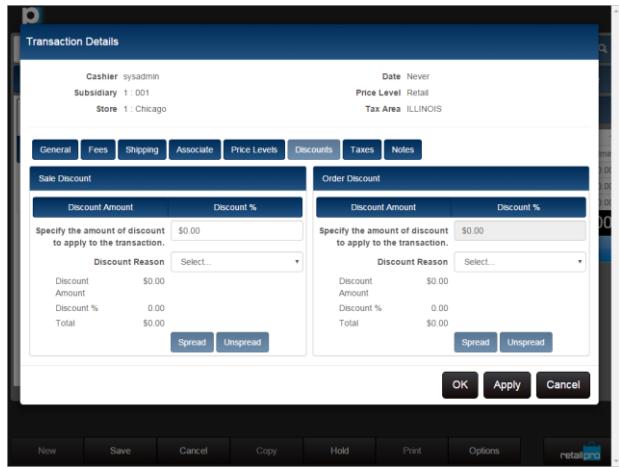
Transaction-Level Discounts

Assigning a Discount Amount

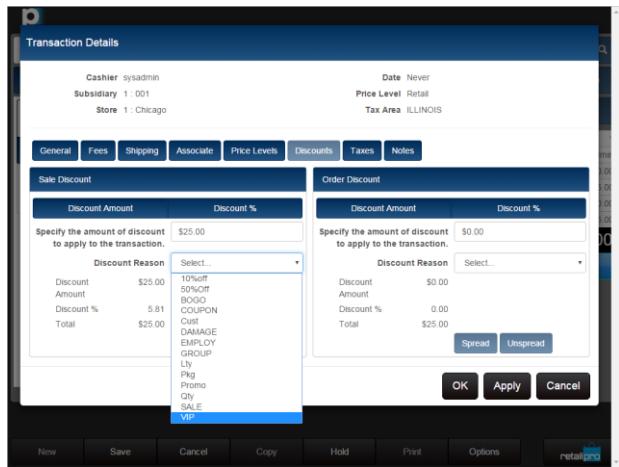
1. In the Point of Sale module, create a new transaction
2. List several items
3. Click the “Transaction Details” button



4. Click the “Discounts” tab



5. In the “Transaction Details” window, click the “Discount amount” button
6. Enter Discount Value into the discount field
7. Choose the discount reason
8. Click the “OK” button to close the “Transaction Details” window



9. Note the transaction discount is displayed and spread on to the articles automatically.
10. Click the “Tender Transaction” button
11. Click the “Print Update” button to complete the transaction

The screenshot shows the Retail Pro POS software interface. On the left, there's an 'Item Lookup' window displaying two items: 'REVIVAL JERSEY POLO' (UPC 383, Price \$135.00) and 'MATTE STRETCH POPLIN D SHIRT' (UPC 239, Price \$295.00). Both items have a 'Type Sale' status and a 'Disc% 0' discount applied. On the right, the 'Transaction Details' section shows the cashier as 'sysadmin', sales subtotal as '\$430.00', and a transaction total of '\$405.00'. A large blue button at the bottom right says 'Tender Transaction'.

Assigning a Discount Percentage

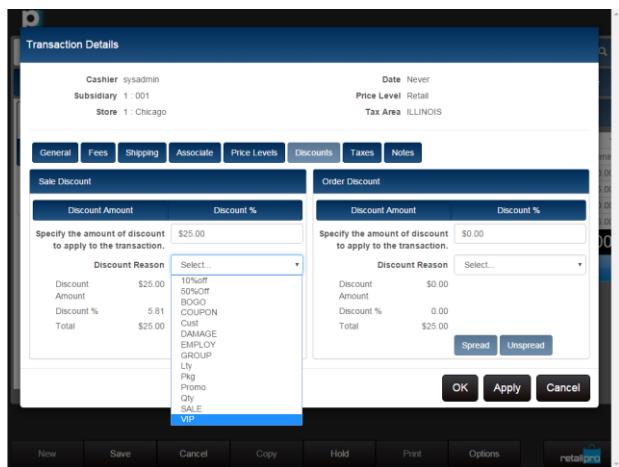
12. Click the “New” button to create a new transaction
13. List several items
14. Click the “Transaction Details” button

This screenshot is identical to the one above, showing the same transaction details and the 'Tender Transaction' step. The transaction total is now explicitly shown as '\$430.00'.

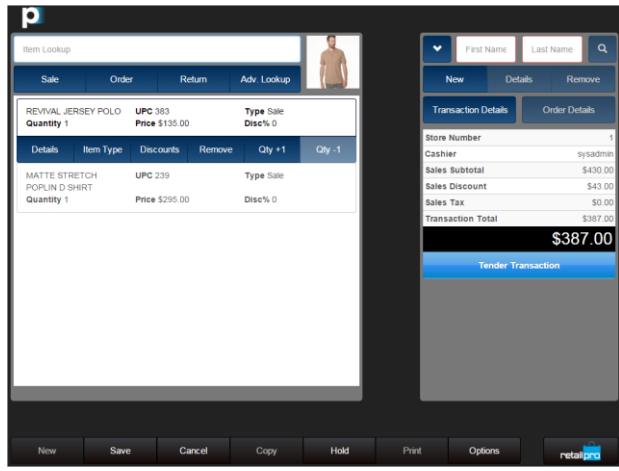
15. Click the “Discounts” tab

The screenshot shows the 'Transaction Details' screen with the 'Discounts' tab selected. At the top, it lists cashier information (sysadmin), date (Never), price level (Retail), and tax area (ILLINOIS). Below this, the 'Sale Discount' and 'Order Discount' sections are visible, each with fields for 'Discount Amount' and 'Discount %'. Buttons for 'OK', 'Apply', and 'Cancel' are at the bottom right.

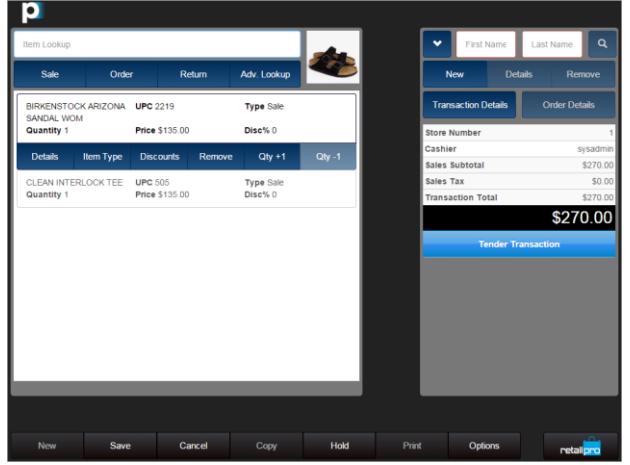
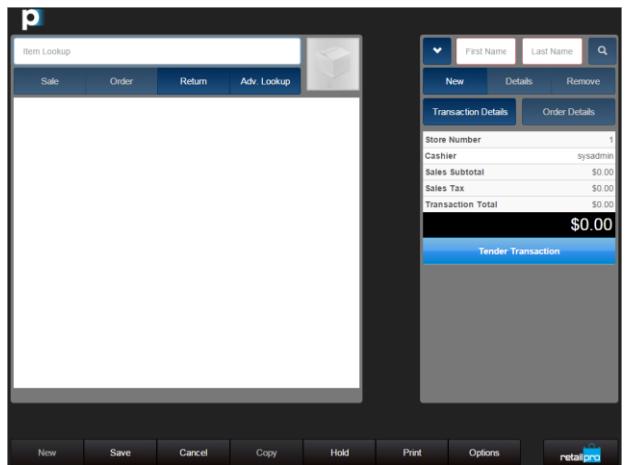
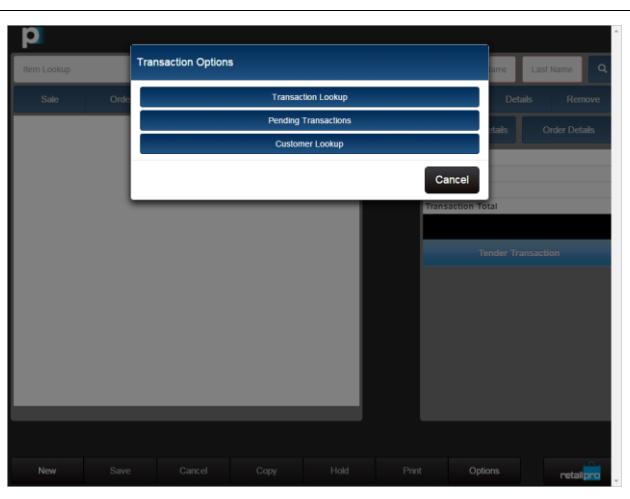
16. In the “Transaction Details” window, click the “Discount %” button
17. Enter Discount% into the discount field
18. Choose the discount reason
19. Click the “OK” button to close the “Transaction Details” window



20. Note the transaction discount is displayed and spread on to the articles automatically
21. Click the “Tender Transaction” button
22. Click the “Print Update” button to complete the transaction



Holding and Un-Holding a Transaction

Hold a Transaction <ol style="list-style-type: none">1. In the POS area, create a new transaction2. List a few items3. Click the “Hold” button on the bottom menu toolbar	
Un-hold and Complete the Previously Held Transaction <ol style="list-style-type: none">4. On the new transaction, click the “Cancel” button5. Click the “Options” button	
6. Click the “Pending Transactions” button	

7. Specify today as the “From Date” and “To Date” and then click the “Search” button
8. Click on the appropriate “held” transaction and click the “View Transaction” button

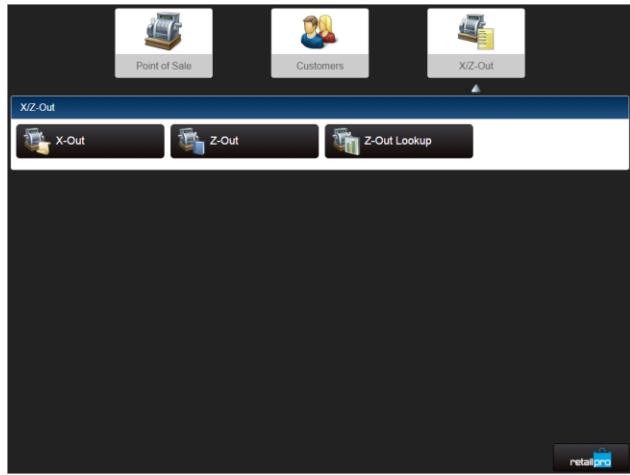
9. Click the “Un-Hold” button

10. Tender/Update the transaction

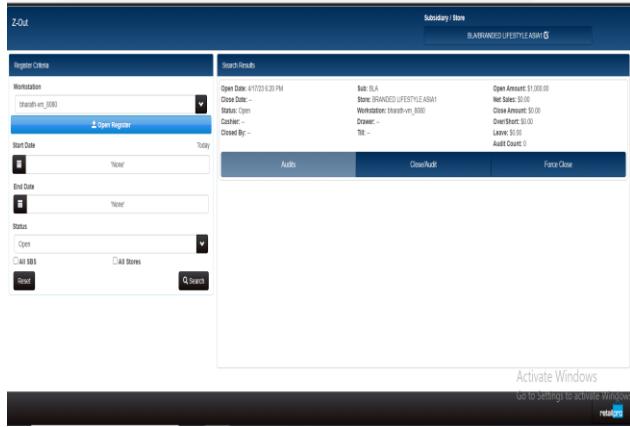
Close Register

Reconcile the Register

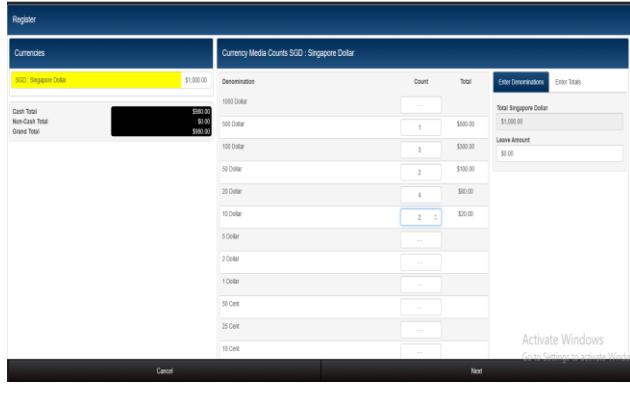
- From the Point of Sale > X/Z-Out area, click the “Z-Out” button



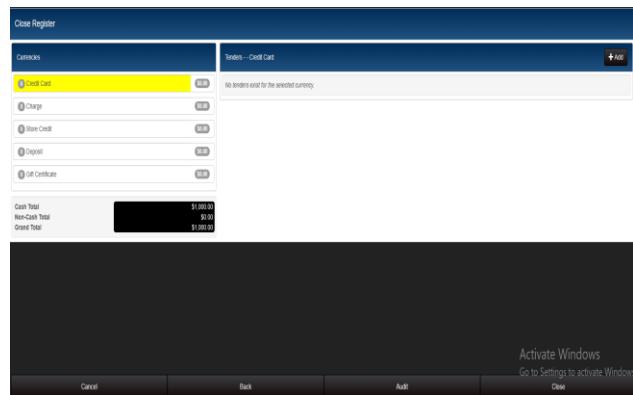
- Click the “Close/Audit” button



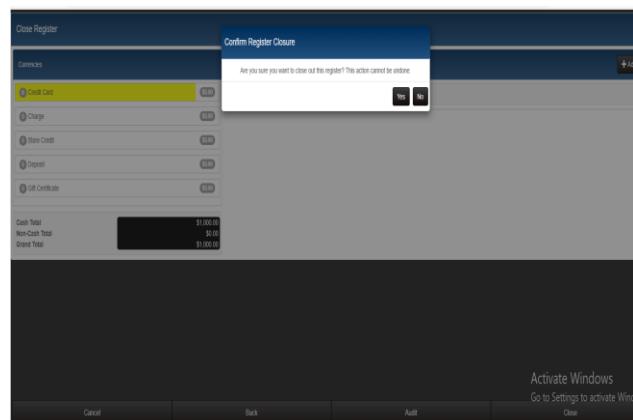
- Enter the following “Currency Media Counts”:
- Click the “Next” button



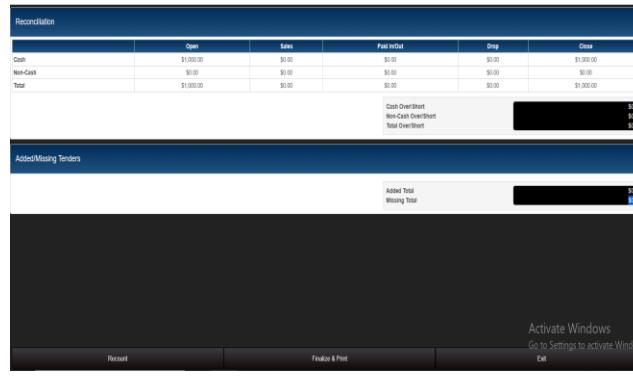
5. For the “Non-Currency Media Counts” area, check all entries
6. Click the “Close” button



7. Click the “Yes” button to reconcile



8. Note that the “Over/Short” column indicates zero.
9. Click the “Preview” button to view the Z-Out report



10. Click the “Close” button

