



Reference Guide

Vend Point of Sale
for
Playbill Pty Ltd

This document will be updated on a regular basis to ensure currency.
Review this document regularly to ensure you have the most current information
regarding these systems
If there is an item that is unclear or incomplete, provide feedback to Head Office.

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At the Register

Equipment

iPad

iPads, cases, cables, power supplies and other hardware are property of Playbill. We are not a personal re-supplier of these items.

Setting up a new iPad

iPads purchased for Playbill are set up using a Mobile Device Manager (MDM) and are configured by a Device Enrolment Program (DEP) which automatically sends all settings and apps as required by the device.

This is managed at Head Office by the POS support staff.

If you have a new iPad (or one that has been factory reset remotely) you will need to do the following:

1. Turn on the iPad
2. Select **Get Started**
3. Select your language - **English**
4. Select the country you are in
5. Connect to a WiFi network
iPad will retrieve its configuration from the MDM.
Cellular devices can use their data connection if no WiFi available.
Select **Next**.
6. On the Remote Management screen, select **Next**.
iPad will configure according to settings from the MDM.
This could take a few minutes.
7. Select **Enable Location Services**
8. Select **Get Started**
9. Home screen will automatically configure as per settings including installing apps. If this does not happen, advise Devices Coordinator.
10. Open new app **Meraki MDM** (SM logo)
11. Select **Allow** on notifications pop up
12. Select **Enable** on location services pop up
13. Select **Always Allow** on location services confirmation
14. Confirm four status symbols are green ticks

Power Supply

iPad power supply and USBA to Lightning cable **MUST** be genuine Apple products. Head Office holds stock of these.

If a non-Apple power supply or USBA to Lightning cable is in use, this should be replaced immediately.

If the provided cable is not long enough, a USB extension cable will be provided upon request or can be sourced.

WiFi

All iPads, through the MDM, are pre-loaded with recommended WiFi networks.

If your venue does not automatically connect, provide the WiFi name and password to the POS support staff to set this up.

Cellular devices should be operated on WiFi where possible, however will have an automatic cut-over if WiFi is not available.

These devices can also be used as mobile hotspots for WiFi only iPads.

iPad Troubleshooting

I've been asked to do a Hard Reset on the iPad

Hold the power and home button together until the Apple logo appears on the screen.

App is frozen on a task or process

1. Double click iPad Home button.
2. Force close app by swiping it up
3. Re-open the app
4. Confirm issue is resolved
5. If issue persists, escalate to support.

Cellular connection failure and WiFi not available

Operate Vend in offline mode

1. Confirm Vend will no longer communicate with cloud
 - a. Check this by adding a customer to the sale and confirming promotions will not apply quickly
2. Enable Airplane Mode on the iPad
 - a. Double click the Home Button and press the plane icon
 - b. Ensure that Bluetooth remains on and that Scanner and Printer are still connected.



Vend is now operating in
continue to work as normal **except**

OFFLINE MODE. While in this mode, all services

- Open/Close Register
- Sales History
 - Returns cannot be processed for sales completed offline in any outlet UNTIL returned online and sync completed
- Promotions
 - This is the feature we use to apply members discounts etc.
- Data sync to/from cloud
- Product Information Look-Up (Stock on Hand live updates)
- Stock on Hand adjustments/transfers

General Sales

No change here, process as usual. Ensure customer takes their receipt.

Members/Discounted Sales

1. Add customer to sale as usual
2. Set appropriate discount or unit price to **each line** of the sale

Apply discount to this product

10%

1 2 3

4 5 6

7 8 9

. 0 <

Set Discount

Sydney Swans Member

Offline

1 Sydney Swans 2018 Mens L... 112.50
SW18JSY14M / XL 125.00

1 Sydney Swans 2018 Toddle... 72.00
Red/White / 4 80.00

Quantity Price Discount

1 \$ 72.00 10 %

Note

Enter a note about this product

View Inventory & Details

3. Do not add discount using Add Discount option above the Pay button
4. Add Sale Note advising "Offline"

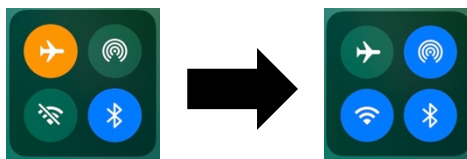
ADD Discount Promo Code Note

Tax GST 10% \$5.00

Pay 1 item \$55.00

Return online as soon as possible

1. Disable Airplane Mode on the iPad
 - a. Double click the Home Button and press the orange plane icon



2. Sync all data in Vend to push offline sales to the cloud

Playbill

PPL | HO | Head Office | 1/1

Online

Sell Screen OPEN

Sales History

Cash Management

Close Register

Dashboard

Status

Connection Online

Products Idle

Sales Idle

Customers Idle

Store Idle

Quick Keys Idle

Search Idle

Sync all data

Vend Register 2.7.3 (877)

3.

WiFi failure. Cellular connection available

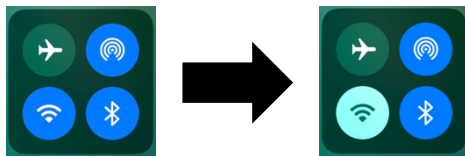
1. Check for internet access
 - a. Use Safari to try and access any website
 - b. Check Access Point (White Internet Box) light (Blue = Connected)
4. Identify devices in outlet that have a Cellular connection available.
 - a. In most outlets where Playbill WiFi is installed, at least one device has Cellular connectivity, or a Cellular device is accessible.
5. Turn on Personal Hotspot on Cellular Device



6. Connect the WiFi only iPads to the Hotspot WiFi Name using the password on the screen.
7. When Playbill WiFi connection is restored, return to the Playbill WiFi network

NOTE

- Do not connect any devices to venue WiFi connections unless approved prior
- Free Public WiFi networks are **not** to be used **at any time** unless explicitly approved by support.
- A cellular device will automatically cut over to the cellular networks. If this does not occur, simply turn the WiFi connection off



Printer

All printers are Bluetooth enabled and suitable for use with the iPads and our POS apps of choice. Printers that are sent out in a kit should be pre-paired with the iPad they are sent with, however occasionally, this will not be the case.

You will need to identify your printer should you need to connect it to the iPad.

Large Printer - Star Micronics TSP650



- Appears on Bluetooth menu as **Star Micronics**
- Thermal Paper size 80x80mm suitable
- RJ12 (Phone) jack on rear to connect a cash drawer
- Power supply is 2 parts
- Slightly rounded top shell
- Control panel in the centre of the front face

Pairing the Printer with an iPad

1. Turn the printer **On**
2. Open the **Settings App** on the iPad
3. Press and hold the **PAIR** button on the back of the printer for **8 seconds**
4. Open the **Bluetooth** menu
5. Tap **Star Micronics** to connect

Un-pairing the Printer with an iPad

1. Turn the printer **On**
2. Open the **Settings App** on the iPad
3. Open the **Bluetooth** menu
4. Select (i) next to *Star Micronics*
5. Select **Forget This Device** and **OK**

Setting up the printer in Vend

1. Open **Settings** menu in Vend
2. Select **Hardware**
3. Select **Add Printer**
4. Give printer a name – **TSP650**
5. Open **Printer model** menu
6. Select printer - **Star TSP650II (Bluetooth)**
7. Select **Find** and select *Star Micronics* when it appears as a connected device
8. If cash drawer attached select additional options:
 - a. Enable Cash Drawer
 - b. Open After Cash Sale
9. Save and ensure that printer now appears in Receipt Printers List
10. Adjust settings as needed by selecting the printer in this list

Large Printer – Star Micronics TSP 143



- Appears on Bluetooth menu as **TSP100-FXXXX**
- Thermal Paper size 80x80mm suitable
- RJ12 (Phone) jack on rear to connect a cash drawer
- Power supply is 1 part
- The USB port on the rear of this printer supplies power at 5W (5V, 1A). Suitable for powering/charging Scanners or Square Readers only.
This port does not supply enough power for an iPad as they require at least 10W (5V, 2.1A) (modern iPads 12W (5V, 2.4A) to sustain their power needs, especially during use.
- More squared off top shell. Control panel on right hand side of front face.

Pairing the Printer with an iPad

1. Turn the printer **On**
2. Open the **Settings App** on the iPad
3. Open the **Bluetooth** menu
4. Tap **TSP100-FXXXX** to connect

Un-pairing the Printer with an iPad

1. Turn the printer **On**
2. Open the **Settings App** on the iPad
3. Open the **Bluetooth** menu
4. Select (i) next to *Star Micronics*
5. Select **Forget This Device** and **OK**

Setting up the printer in Vend

1. In Vend, press **≡** then **Settings**
2. Select **Hardware**
3. Select **Add Printer**
4. Give printer a name – **TSP143**
5. Open **Printer model** Menu
6. Select printer - **Star TSP143**
7. Select **Find** and select *TSP143* when it appears as a connected device
8. If cash drawer attached select additional options:
 - a. Enable Cash Drawer
 - b. Open After Cash Sale
9. Save and ensure that printer now appears in Receipt Printers List
10. Adjust settings as needed by selecting the printer in this list

Small Printer – Star Micronics SM220i



- Appears on Bluetooth menu as **Star Micronics**
- Thermal Paper size 57x34mm suitable
- Belt Clip option available for mobile sellers
- Works on battery power if desired
- Not suitable for use with automated cash drawers

Pairing the Printer with an iPad

1. Turn the printer **On**
2. Open the **Settings App** on the iPad
3. Open the **Bluetooth** menu
4. Tap **Star Micronics** to connect
 - a. PIN Code is **1234** if requested

Un-pairing the Printer with an iPad

1. Turn the printer **On**
2. Open the **Settings App** on the iPad
3. Open the **Bluetooth** menu
4. Select (i) next to *Star Micronics*
5. Select **Forget This Device** and **OK**

Setting up the printer in Vend

1. In Vend, press **≡** then **Settings**
2. Select **Hardware**
3. Select **Add Printer**
4. Give printer a name – **SM-S220i**
5. Open **Printer model** Menu
6. Select printer - **Star SM-S220i**
7. Select **Find** and select *Star Micronics* when it appears as a connected device
8. Save and ensure that printer now appears in Receipt Printers List
9. Adjust settings as needed by selecting the printer in this list

Printer Troubleshooting

No receipt is printing

- Is the printer powered on?
- Is there paper on the roll?
- Is the printer connected via Bluetooth?
- Has the printer been set up in Vend?

Receipt is printing blank

Is the paper in the printer thermal paper?

Test this by trying to draw a line on the paper using a fingernail or blunt object (Not a pen/pencil).

If a dark mark appears, then you have thermal paper and there is likely an issue with the printer.

Contact Support.

If no dark mark appears, then you are using the wrong type of paper and need to switch to a thermal roll.

Receipts are printing twice

1. In Vend, press ☰ then **Settings**
2. Select **Hardware**

If there are two printers present, remove one.

If there is one printer present, select it and ensure the number of receipts it is set up to print is **1**.

Receipts are printing on the wrong printer

Likely that the printer is paired to a different iPad. Check in the iPad Settings App.

Unpair and re-pair accordingly with the correct printer as appropriate.

Cash Drawer is not triggering

Confirm a large printer is in use and that it is connected to the iPad via Bluetooth and the cash drawer via the cable.

1. In Vend, press ☰ then **Settings**
2. Select **Hardware**

Open the connected printer and check that the following options are both turned **on**

- Enable cash drawer
- Open after cash sale

Red lights are flashing at me

The following are all possibilities in this scenario

1. The printer is out of paper
2. The paper is sitting off its base inside the printer
3. The paper cover is open
4. Other major error

Printer has physical damage

Report immediately to supervisor/manager to pass onto Head Office to resolve. Photos should be provided to assist a prompt resolution.

Scanner

All scanners are Bluetooth enabled and suitable for use with the iPads and our POS apps of choice. Scanners that are sent out in a kit should be pre-paired with the iPad they are sent with, however occasionally, this will not be the case.

You will need to identify your scanner should you need to connect it to the iPad.

Scanners are all issued with lanyards which are mandatory for use. These are the most fragile and costly item in the POS kit and must be handled as per instructions from Head Office.

Socket CHS-7Ci



- Two buttons
 - Large button is the scanning trigger
 - Small button the power button
- One multi-colour light

Applying POS settings to Scanner

1. Turn the scanner **on**
2. Scan the **Factory Reset** barcode which turns the scanner off



3. Turn the scanner **on**
4. Scan the **POS App Mode** barcode



5. Pair the scanner with the device via the iPad Bluetooth settings menu

Pairing the Scanner with an iPad

1. Turn the scanner **On**
2. Open the **Settings App** on the iPad
3. Open the **Bluetooth** menu
4. Tap **Socket CHS [XXXXXX]** to connect

Un-pairing the Scanner with an iPad

1. Turn the scanner **On**
2. Open the **Settings App** on the iPad
3. Open the **Bluetooth** menu
4. Select (i) next to **Socket CHS [XXXXXX]**
5. Select **Forget This Device** and **OK**
6. Hold both buttons on scanner until chime sounds

Socket S700



- Two buttons
 - Large button is the scanning trigger
 - Small button the power button
- Three lights
 - Battery indicator
 - Scanner active
 - Bluetooth indicator

Applying POS settings to Scanner

1. Turn the scanner **on**
2. Scan the **Factory Reset** barcode which turns the scanner off



3. Turn the scanner **on**
4. Scan the **POS App Mode** barcode



5. Pair the scanner with the device via the Bluetooth settings menu

Pairing the Scanner with an iPad

1. Turn the printer **On**
2. Open the **Settings App** on the iPad
3. Open the **Bluetooth** menu
4. Tap **Socket S700** to connect

Un-pairing the Scanner with an iPad

1. Turn the printer **On**
2. Open the **Settings App** on the iPad
3. Open the **Bluetooth** menu
4. Select (i) next to **Socket S700**
5. Select **Forget This Device** and **OK**
6. Hold both buttons on scanner until chime sounds

Scanner Troubleshooting

Scanner is not connecting, not recognised or not paired with the iPad you are at

Try forcing the connection in the Bluetooth menu by tapping the **Socket CHS [XXXXXX]** or **Socket S7X0 [XXXXXX]** device.

If this doesn't work, unpair and re-pair the scanner.

Note - Wait for beeps to complete before moving onto the next step

1. Hold the Power and Trigger buttons together. Wait for **3 beeps**



2. Open the **Settings App** on the iPad
3. Open the **Bluetooth** menu
4. Select the (i) next to the scanner
5. Select **Forget This Device** and **OK**
6. Turn the scanner on
7. Pair the scanner with the device via the Bluetooth settings menu

Scanner being on is forcing the iPad keyboard to hide

Scanner settings have been applied incorrectly

Note - Wait for beeps to complete before moving onto the next step

1. Un-pair the scanner from the device
2. Scan the **Factory Reset** barcode which turns the scanner off



3. Turn the scanner on
4. Scan the **POS App Mode** barcode



5. Pair the scanner with the device via the Bluetooth settings menu

Scanner is not holding Bluetooth pairing to iPad

Un-plug and re-plug the scanner charge cable to 'reboot' the charging of batteries. It may take 15 minutes for a scanner to have enough charge to stay connected to the iPad.

Once light on scanner turns solid green, use scanner on battery power during selling periods.

Scanner has physical damage

Report immediately to supervisor/manager to pass onto Head Office to resolve. Photos should be provided to assist a prompt resolution.

Square Reader & Dock

Square is a payment gateway that has direct integration with Vend so there is no requirement for additional input on external hardware.

Device Set-up

Each Square unit is comprised of 3 parts



To assemble the Square unit

1. Remove the **Dock Lock** from the **Square Dock** (pull it straight up, there is a fingernail grip on the rear side).
2. Slide the **Square Reader** onto the **Square Dock** ensuring that the USB micro-B port on the **Square Reader** is aligned and securely plugged into the USB micro-B plug. The smooth side of the **Square Reader** should be facing down and the side with the contactless payment symbol should face up.
3. Replace the **Dock Lock** into the **Square Dock**

The set up should look like one piece without any parts raised etc. If this is not the case, complete this again.

Power is supplied via a standard USB-A power supply. The wall adapter for the Socket scanners, or the USB port in the Large Printer TSP143 is suitable.

If the **Square Dock** is not available, the **Square Reader** can be used on its own. Ensure that you have charged the device or have access to a USB micro-B cable to provide charge.

System Set-up

Setting up the Device in Square (Web Browser)

1. Login to Square squareup.com
2. Open **Account & Settings**
3. Select **Business > Locations** and confirm that required location is in the list.
Nickname will match the *Vend Outlet* name
4. Select **Business > Devices** and confirm that required Device Name is in the list.
Device Name will match the *Vend Register* name
5. Select **Add a Device**
6. Give Device a *Nickname* using the *Vend Register* name
7. Select Location to assign from the list
8. Email/SMS/record the device code generated
NOTE – Device Codes expire after 48 hours at which time they will need to be regenerated.

Allocating device on Vend (Web Browser)

1. Login to Vend
 - playbill.vendhq.com*
 - playbillnz.vendhq.com*
 - platypusproductions.vendhq.com*
 - a. NOTE - Do **not** put 'www' in web address
2. Select **Setup > Payment Types > Square**
3. In the **Square Locations** list assign the *Square Location* from the drop down for each applicable register.
4. Select **Save Payment Type** at the top of the page.

Setting up the Reader on the iPad

1. Open **Square App** on iPad
2. Select **Sign in** then **Use a Device Code**
3. Enter the *Device Code* provided for the register you are setting up and select **Sign In**
4. Confirm all device permissions & select Allow for each on any pop ups
5. Use **2021** as passcode whenever prompted
6. Open the menu (≡) and select **Settings > Checkout > Payment Types** and turn off all **Payment Types**
Doing this once in *each* location will apply the settings for all future device connections for that location
7. Select **Settings > Checkout > Receipt** and turn on Skip Receipt Screen switch
8. Select **Settings > Checkout > Customer Management** and turn off all switches
9. Select **Settings > Security**
Passcodes – On
Team Passcode – Off
Require Passcode: When backing out of a sale – On
Timeout – Never
10. Select **Settings > Hardware > Square Reader > Connect a Reader**
11. Follow instructions on the screen to pair the reader. The reader needs to be out of the dock for this step.



The power button is next to the USB micro-B port on the side.

12. Select **Pair** on pop up

Signing out of a location on the Square App

1. Open **Square App** on iPad
2. Select **Settings > Account** and select sign out, then sign out again

Square Frequently Asked Questions

What payment types can we take?

We can accept all payment types where the issued card can be inserted, or a contactless payment can be made.

Customer has a card that does not have an insert chip or contactless payment available

Unfortunately, we are unable to take payment on these cards. Cards without chips are being phased out in Australia so this should be rare.

Please note where the closest ATM is to direct a customer.

The customer doesn't have their card available at the register to pay and wants me to enter it manually

All sales must be made as **Card Present** transactions. The customer will need to get their card, otherwise the purchase will not be able to be processed.

Only Managers may process **Card Not Present** transactions for special arrangements authorised in advance by Head Office.

I'm doing a refund and the original card is no longer current

This should not cause the refund to decline, however if it does decline or the customer asks for information, please advise them the following:

- If the card is with the same bank, for most banks, this will re-direct to their existing account.
- If the card is with a different bank and selecting Square for the refund does not work, there are two options:
 - Customer details (Name, phone number and transaction receipt) will need to be forwarded to Head Office to contact the customer and process the refund using another method, otherwise;
 - A cash refund can be used if the customer is happy to

How long does a refund take to process back into a customer's account?

2-7 business days

A person is returning product that was given to them as a gift

A product that is a gift must be exchanged for a purchase of equal or greater value if the person who received the gift is returning it.

If the person who purchased it is present, this can be returned/exchanged as normal.

Can I do a refund without the transaction receipt?

No.

The original transaction was completed at a location that does not have Square on EFTPOS

Cash Refund, or via Head Office

The original transaction was completed at a location that is operating on Square, but my location has EFTPOS machines still

Refund can be processed via Square

Square Troubleshooting

The Square Reader is not responding

To check the Square Reader status, open the Square App and check the Header.

If it says 'Reader Connected' you are good to go.

If it says 'Reader is Updating' allow this to complete

If it says 'Reader Not Connected' check Bluetooth connection for the Square Reader in the iPad Settings.

My internet connection has died, and I can't process payments

If there is a bank issued EFTPOS machine available, use this machine and use the EFTPOS payment type.

Logging into Vend

iPad App

Vend should be logged in when you arrive to a register, however if the welcome screen comes up when Vend Register app is opened on an iPad

- Enter Store Address –
playbill.vendhq.com
playbillnz.vendhq.com
platypusproductions.vendhq.com
- Enter Username & Password provided
- On blue screen scroll to Outlet and select Register

All employees can log into a register they are able to access. Selecting the correct register is very important.

Web Browser

- Open any internet browser (Chrome, Safari etc.)
- Enter Store Address –
playbill.vendhq.com
playbillnz.vendhq.com
platypusproductions.vendhq.com
 - Do **not** put 'www' in web address
- Login using the same username and password as the iPad app

Vend Troubleshooting

iPad App

Staff member cannot see their profile to log in

- Contact Manager to rectify
- Open Vend on Web browser
- Open Setup/Users
- Find user & open profile
- Under Outlets, open drop-down menu and ensure required venues are ticked.
- Save user – Will require password of person editing the profile

Product barcode is not recognised when scanned

Product has likely not been pushed to Vend from our Inventory System yet.

Contact relevant merchandise manager to complete.

Receipt barcode is not scanning

This matter should no longer be occurring. If it is,

- The scanner may need to be re-configured
- The Vend app may need to be updated or uninstalled and reinstalled.

Cannot open/close register

- Is the iPad connected to the internet?
- Is Vend synced?

There aren't any, or the wrong, Quick Keys on my screen

1. Open Side Menu (☰) then **Settings** then **Quick Keys**
2. Select the correct Quick Keys Layout from the available options.

I've been asked to perform a Hard Sync

1. Open Side Menu (☰)
2. Hold your finger on the Online status indicator for 5 seconds
3. On the pop-up menu, tap **Resync Data**
4. Re-open Side Menu (☰) and tap the Online status indicator
5. Tap **Sync all data**

Web Browser

Vend isn't loading

- Is the computer connected to the internet?
- Have you entered the correct Store Address, username and/or password?
- Have you tried a different internet browser (Chrome/Safari/Firefox)?

Getting Ready to Sell

Plug the scanner into power and leave plugged in until light green.

Check Devices are all connected

Open iPad settings and check that all devices have a connected status.

Sync to the cloud

When Vend is logged in for the first time on a device, it needs to sync the product, register and sales data from the cloud.

- Open the side menu (☰) and tap the green or red dot.
- Select 'Sync all data' and wait for the process to complete.
- When the dot is green and says Online, the register is ready to sell from.

Perform this action throughout the shift during any slow periods.

Check Outlet & Register

- Open the side menu (☰)
- Under the store name (eg. Playbill) is the outlet and register.
- Check that the Outlet and Register are the same as where you are located.

Open Register

- Press (☰) then Open Register
- Count and enter float amount. If there are any discrepancies or notable issues with the float enter these in the notes field.
- Select Set Opening Float and retain the receipt.

Processing Sales

Adding Products to Sales

Scanning Barcodes with Bluetooth scanner

Use the scanner to scan item/s to add to the sale.

Scanning Barcodes with iPad camera

Tap in product search bar.

On top right of the keyboard is a camera icon, select this and allow the camera to be used.

Align barcode with the camera and adjust to be in focus.

Product will be added to sale.

Quick Keys

Click on the product quick key to add it to the sale.

If the product has variants (size/colour/design etc.), you'll need to pick the variant you are adding to the sale.

Searching for items

Search is a last resort and should be avoided as often as possible.

To search for an item, tap in the product search bar and type the product name. You must confirm the product is absolutely correct including manufacture year, colour etc.

Adjusting Quantities

If a customer wants to buy multiples of an item, you can increase the product quantity. There are two ways to do this

1. Scan the additional item/s or select the item/s again using the quick keys.
2. Change the quantity by editing the sale item

To edit the quantity, tap the item in the sale panel.

Tap the QTY option, a popup will open. This will enable you to either type or use the +/- sign, to change the quantity.

Product Detail

If you require more information about the product you are selling like

- Price
- Available sizes
- Year of manufacture and other tags
- Stock on Hand by location

Long press on the item in the sale list. The current outlet's stock on hand will be listed.

If you select the (...) button all outlets are listed, and you will be able to check the stock on hand at those outlets and other sizes for apparel.

Applying Discounts

- Cast & Crew
- Sport Club members
- Playbill Casual Staff
- Playbill Casual Staff - Uniform

Adding a Customer

Tap the 'Add a customer' box above the sale list.

Type customer name and select from list.

Suitable price reductions will automatically apply to the sale based on pre-set rules/price lists.

Other discounts

Discounts should not be added to any aspect of a sale manually, unless a procedure for that occurrence has been distributed.

Playbill's Returns Policy - Australia

We cannot accept returns for 'change of mind' but we are happy to process exchanges for equal or greater value if the product is in original condition including all tags and packaging.

We will provide refunds or replacements (where available) for any items with major problems.

This is when the item

- Has a problem that would have stopped someone from buying it if they had known about it
- Is unsafe
- Is significantly different from the sample or description
- Doesn't do what the business said it would, or what you asked for and can't easily be fixed.

Proof of purchase in the form of a Receipt or Tax Invoice will be required for all returns and exchanges.

Refunds & Exchanges

Returns are made up of three parts

1. Receiving an item back from your customer
2. Issuing a refund or exchanging the item for a replacement
3. The item being returned added to stock on hand

It is important to note that you may only complete a return on fully paid sales and **not** on an existing return transaction.

Refunds must be assessed by and may only be performed by a manager.

To process a return

1. Ask the customer for their original receipt
2. Open the side menu (☰) and open *Sales History*
3. Use the filter options to search by receipt number (or other details) if required
 - o Type receipt number, or scan the barcode on the receipt
4. Locate the sale and tap on it to expand the details
5. Check the item being returned to ensure it matches the item sold
6. Click on the *Return Item* button. This will load the customer's original transaction into the sell screen
7. The item/s will now appear on the sell screen as negative amounts
8. If it is a multi-item sale, the customer may only wish to return one of the items.
Remove any products the customer is not returning.
9. Once you confirm the returned items and/or exchanged items, click the *Return* button.
NOTE – Replacement Items purchased as part of an exchange will appear as positive numbers.
10. If your sale does not already have a customer attached, you'll be asked to record the customer's details. Please do not fill this out.
11. Payment will need to be made by the customer if any additional items mean they spent more than previously.
If they are owed a refund, complete this in cash unless the original sale was paid using Square.
12. For Square Refunds, select the Square payment type when refunding. The card used on the original transaction will be refunded the amount owed. The card does not need to be present for this to occur.

Second Exchange

Where an exchange has already occurred on a sale, a second exchange cannot be processed in Vend. This needs to be processed as a “-1, +1” style transaction.

1. In the sale, enter the returned items as negatives and the new purchase as positives
2. If the sale has a positive sale value, process as per a normal Square payment
3. If the sale has a negative sale value, process the sale as follows:
 - a. Select EFTPOS payment type
 - b. Open the Square App
 - c. Open the menu (☰) and select Transactions
 - d. Enter the PIN code **2021**
 - e. Have the customer tap their card on the Square Reader
 - f. Confirm the amount and time for the original sale
 - g. Enter the amount for the refund and complete

Paying for a Sale

If you select the incorrect payment type by accident, tap anywhere on the transaction complete screen and **undo the previous payment**.

Cash

On the Pay screen:

1. Confirm the Amount to Pay and select **Cash** then appropriate quick cash payment key.
2. Change required will be displayed on the next screen.

Square

On the Pay screen:

1. Confirm the Amount to Pay and select **Square**
2. The Square App will launch and activate the **Square Reader**
3. Tap or insert the card on the **Square Reader**



4. Payment status will appear on the screen

NOTE: For *Account Selection*, *entering a PIN* and *signature required* transactions the iPad will need to be turned around and the customer completes this on the iPad screen.

All iPads are installed with a swivel base, so this can be done without lifting the iPad off the counter.

5. Vend will reopen when the payment is processed

If an error was made, and you need to return to Vend before taking payment, select the X. You will need to enter a PIN code to exit out of the payment.

The PIN code is **2021**

Manual Card Entry (Card Not Present) on Square

All sales must be made as **Card Present** transactions. The customer will need to get their card, otherwise the purchase will not be able to be processed.

Only Managers may process **Card Not Present** transactions for special arrangements authorised in advance by Head Office.

To process a Card Not Present transaction, on the Pay screen:

1. Confirm the Amount to Pay and select **Square**
2. The Square App will launch and activate the **Square Reader**
3. On the iPad screen, select **Manual Credit Card Entry**
4. Enter the Card details and select **Charge**

Phone Sales (Card Not Present) on Square

Only Managers may process **Card Not Present** transactions for special arrangements authorised in advance by Head Office.

To process a Card Not Present transaction, on the Pay screen:

1. Confirm the Amount to Pay and select **Square**

2. The Square App will launch and activate the **Square Reader**
3. On the iPad screen, select **Manual Credit Card Entry**
4. Enter the Card details and select **Charge**

EFTPOS

On the Pay screen:

1. Process the payment on the EFTPOS machine.
2. Confirm the Amount to Pay and that the payment is approved.
Ensure that the amount charged through the EFTPOS machine is the same as the amount processed through Vend.
3. Select **EFTPOS**.
4. The payment will apply to the sale.
5. Playbill's EFTPOS machines are not directly integrated with Vend and will not prompt a transaction on the EFTPOS machine.

Split Payment

NOTE: For split payments involving Cash, charge the Cash amount last

On the Pay screen:

1. Change the Amount to Pay by tapping the 9 dots icon
2. Enter the new payment amount
3. Select Update Payment
4. Process payment per methods above

Program Voucher

Follow the instructions for **Program Vouchers** [here \(Page 13\)](#).

zTBI – To Be Invoiced

Follow the instructions for **zTBI – To Be Invoiced** sales [here \(Page 13\)](#).

Do Not Use

- Gift Voucher
- Ticketek Voucher
- Square
- Gift Card

No, unfortunately we cannot re-order these options.

Special Sale Scenarios

Program Stands without POS units

Use Vend on a web browser to process program stand sales following the sales period.

Program Vouchers

Program vouchers are not to be accepted if no advice has been received prior to the event. If an unknown voucher is received, the supervisor/manager should verify with the Head Office team.

For All Program Vouchers Received

1. Process sales where program vouchers are used separately from any transaction
2. Add a Customer to the sale based on advice from Head Office for the Voucher
3. All program voucher sales are processed as complimentary; however, this must be applied by adding a customer to the sale and not by discounting items.
4. Use **Program Voucher** payment type to close the transaction.

It is recommended that you process one transaction per register, per selling period or shift.

To Be Invoiced sales to Clients, Venues, Producers etc.

Authorised persons from clients, venues, producers etc. are able to draw down from their allocation of programs, or purchase programs or other products at an agreed price.

These transactions are invoiced by Head Office at a later date.

1. Enter products into sale
2. Add customer to sale
This will apply appropriate pricing automatically
3. Add the following details to the sale note
 - a. Person collecting's name
 - b. Purchase Order Number (PO#) (if required/provided)
4. Complete sale using **zTBI** payment type.
NOTE: If pricing is \$0.00 for this customer, use **Cash** payment type as zTBI will be unavailable.
5. Print receipt.
Have the person taking the items sign the receipt. Hand write their name if forgotten in the sale note
The signed receipt goes into the takings bag.
Print a second copy of the receipt for the person.
6. Supervisor to enter the invoice number into the Daily Report spreadsheet and send the signed receipt/s to Head Office each week.

Closing the Register

Sync the Register

Before closing the register, ensure that Vend Register has synced all data to the cloud.

Open the side menu (☰) and tap the green or red dot. Select 'Sync all data' and wait for the process to complete. When the dot is green and the text reads Online, you can Close the register.

Close Register

1. Count cash – Vend totals **INCLUDE** float
 - a. For Theatre locations, floats are to be kept separated for use at next shift.
2. Select **Close Register**
3. Enter total **Cash in Till** in **Counted (\$)** column
4. If you are using Square, these totals will be pre-filled, and you can skip to Step 7.
5. Run shift summary on EFTPOS machine
6. Compare total to **EFTPOS Expected (\$)** column value
7. Note reason for discrepancy (if any)
8. Select **Close Register**
9. **Print** Register Closure Report, place with cash takings & EFTPOS receipts and give to supervisor

Packing Up

End of Night – Not Transporting

Scanner

Turn the scanner off & unplug it from the power source at the end of each shift.

iPad

If the outlet **is accessible** by non-Playbill employees place iPad, scanner and other easily moved items into locked cupboards.

In this scenario, turn off the iPad by holding the power button and swiping the power slider when it appears.

If the outlet **is not accessible** by non-Playbill employees and can be secured, these devices do not need to be stored otherwise.

In this scenario, lock the iPad's home screen by tapping the power button.

Printer

Large printers can be left in place with all plugs remaining installed.

Small printers can be left in place and should be turned off and un-plugged. Stored in a locked cupboard if in an accessible outlet.

Packing in Transport Case

Follow the guide sheet provided. If one is not present, contact Support.

Stock Management

Damaged Stock

Set product aside and provide a list of damaged items to Head Office with the daily report.

Special Arrangements – Collingwood Shop

These matters may only be completed at the Collingwood Shop location. ISC previously were the operating company at the Collingwood Shop and we have arrangements for managing returns and exchanges for sales that were originally completed by ISC. As we do not have transaction records for these sales, we need to deviate from our standard procedures.

Returns & Exchanges for sales completed by ISC originally

For a return or exchange, as usual, the customer must provide both the product in reasonable condition (unless damaged) and the original proof of purchase receipt.

All returned product (including exchanges) for ISC sales needs to be set aside for the Merchandise Manager to follow up with ISC directly. Product will be either returned to ISC or adjusted into stock. Only once this has occurred can a product be placed on the shop floor for sale.

A central register should be created and maintained with records of all ISC returns.

Details within should include ISC Receipt Number, Customer Name, Customer Phone Number, Product Returned and other relevant information.

Refund

Cash

For refunds made in cash for ISC purchases, treat as a Cash Out transaction.

1. Open Side Menu (☰)
2. Open **Cash Management**
3. Select **Remove cash**
4. Select **Cash Out**
5. Enter amount to refund
6. Add note for reason (include transaction ID from ISC sale)
7. Select **Remove Cash**
8. Give customer cash and put receipt into cash banking to send to Head Office

Card

If the customer requires the refund to be processed to the card of purchase, enter into the central register for Head Office to pass on to ISC.

Head Office will contact ISC to process the refund.

Advise the customer that it may take 10-15 business days for the full refund to occur.

Exchange

1. Complete a refund for the original ISC sale (use above method) and set the returned product aside.
2. Write on the ISC receipt the product that has been refunded and give the customer a photocopy.
3. Create a new sale in Vend for the new product and process as a normal sale.
 - a. If the customer is purchasing the same product (size change/replacement) and our retail price is higher. adjust to the price on the ISC sale.
If our retail price is lower, leave the price as set.

Redeeming ISC Gift Cards