Visual Retail Plus - Point of Sale Users Manual

Table of Contents

1 Introduction

Welcome to Visual Retail Plus!

If you are reading this, then you are the proud new user of the Visual Retail Plus point of sale system. The documentation is divided into two sources, this point of sale manual and the back office users manual.

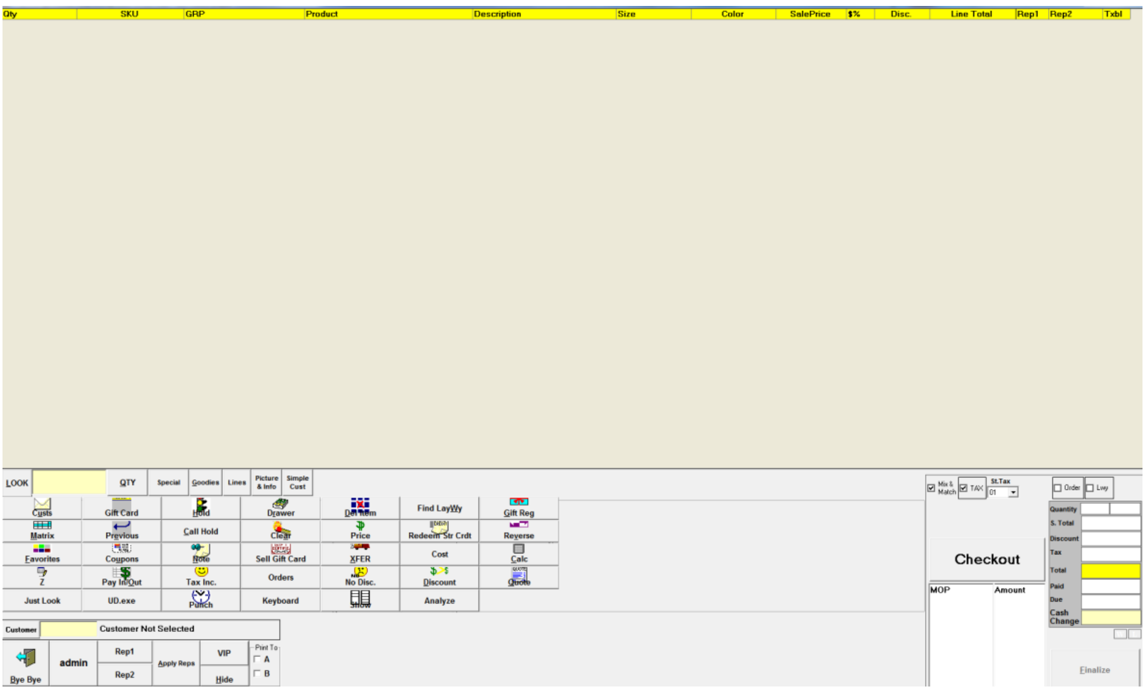
Who should read this manual?

The Point of Sale manual should be read by those who will be primarily concerned with the operation of the point of sale system. Cashiers, store managers, sales associates, or other employees who will be responsible for the "ringing up" of sales.

Opening the Point of Sale

Accessing the point of sale screen is accomplished by means of the POS button from the main screen view. When the program first loads, the POS button is the default option and can be invoked by pressing the **Enter** key. If the program has not just loaded, the enter key will invoke the last used button.

1 Point of Sale Screen



The Visual Retail Plus point of sale screen is shown above, with the three main areas of the screen outlined in red. The three main areas of the POS screen are comprised of the following:

POS Screen Areas

1.) - Display Area. The display area contains information regarding items that are currently "attached" or connected to the sale-in-progress. Each item that is scanned at the point of sale appears here on its own line. The lines contain information regarding the product, size, color, price, upc, discounts, tax, and the quantity of items that are being purchased (or returned.)

2.) - Controls Area. The controls area contains 35 buttons to facilitate the many features available in Visual Retail Plus. The exact function of each button will be explained in greater detail later in the manual. The buttons in the center of this area can be hidden to prevent unauthorized use. Also, access to these functions is regulated by the security model allowing for free access, password restricted access, or zero access based on login name.

3.) - Currencies/Finalization Area. This area contains the grid showing the available methods of payment as well as a breakdown of the total item count, subtotal, tax, and change due.

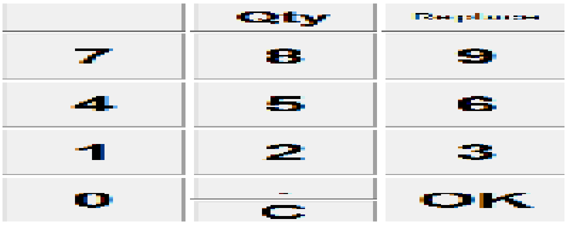
Display Area

Items added to an ongoing transaction are shown in the display area. Information about each item is displayed as shown above. Several functions are accessible directly by clicking on the display area.

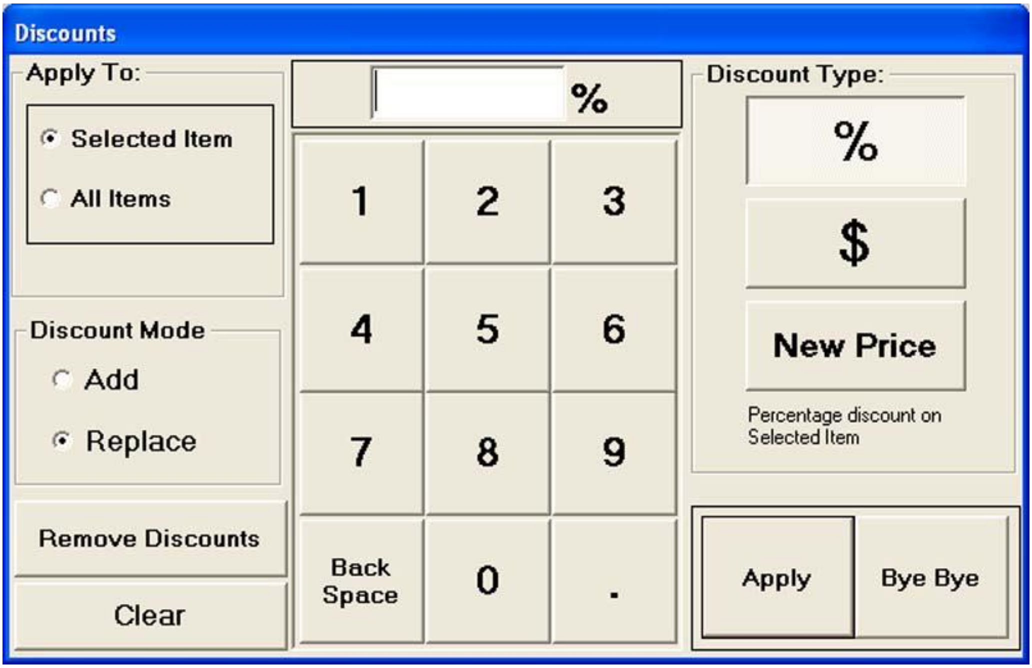
Qty	SKU	GRP	Product	Description	Size	Color	SalePric	$%	Disc.	Line Total	Rep	Rep2	Txb
1	824573	tori praver	Bgrid	betty bottom	L	A001	$85.00	%	0	$85.00			1

Quantity: Click on the Qty field and change the number by typing to alter the quantity of items being sold. Items cannot be set to a quantity of 0. To remove an item from the sale use the "Del item" button.

SalePrice: To change the sale price for an item for one sale only, double-click on the sale price field. A price change window opens up if the current user has been granted permission to that function..



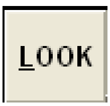
Change Rep: Double-click in the rep1 or rep2 field to assign a different sales rep to that item. Note Rep2 may show up as “R” if the grid is not expanded fully.
Discount Type: Double Click in the %/$ column to change the discount mode from “Dollars-off” ($) to percentage (%).
Discount Amount: Double Click on the “Disc.” field to set the discount amount (either in dollars or in percentage based on the setting in the $/% field. The discounts window, depicted here, is where you define the nature of the discount. This is identical to the use of the discounts command button. For a detailed explanation of the use of this control window, see the “discounts button” in the controls section.



Txbl: The checkbox in this field allows you to select taxable or non-taxable status for that item. If the checkbox is empty, the item is not taxable.

Controls Area

The controls area of the POS screen contains the buttons used to perform various tasks during a transaction. The buttons and their respective functions are detailed below:



Look: The look button opens an inventory browsing window where you can search for products in the system's inventory list. The operation area of the look up window is shown here. The search fields allow you to refine the listed products to those fitting the criteria provided. The Store field will automatically contain the store ID that is set in "Default PLU store" in the general tab of the setup screen. See "Setup" on page 65 for more information. **Items that are currently part of a HOLD cause a warning to be displayed.**

Enter all or part of any of the listed aspects of a product: UPC, ProductID, Vendor (dropdown list), Description, Size, Color, Group (dropdown list), sub group, sub sub group, User defined fields 1-4, or vendor's product code. Select the item you wish to add to the sale in the upper part of the window and press the "connect" button. The PLU screen closes and the POS screen now shows the selected item as being part of the sale.

The **exact search** option limits the displayed results to products/items that match the text entered in the search fields exactly.

The **Sold Today** button displays a quick message indicating how many of the currently selected product have been sold during the current day.

Other Stores: When your stores are connected to the main office by means of a **VPN** the other stores button displays the available on hand information for a selected product from other store's inventory. This feature cannot be enabled without a VPN.

Multiple Selections:

More than one product can be attached to the current sale via this screen by placing a checkbox in the "Multiple

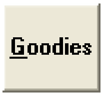
Selections” option. When enabled, another window appears showing the currently selected items.

The “connect” button changes to “Add to List”, and results in the selected product being added to the list of items to be connected. To move the items from the temporary list to the sale - press the “Connect Above List” button.

The “Remove From List” button will take a product (that is selected) out of the temporary list.

Quantity: The quantity button opens a keypad window where you can enter the quantity of items being sold. After scanning/typing in an item, press this button and enter the quantity to attach to the current sale.

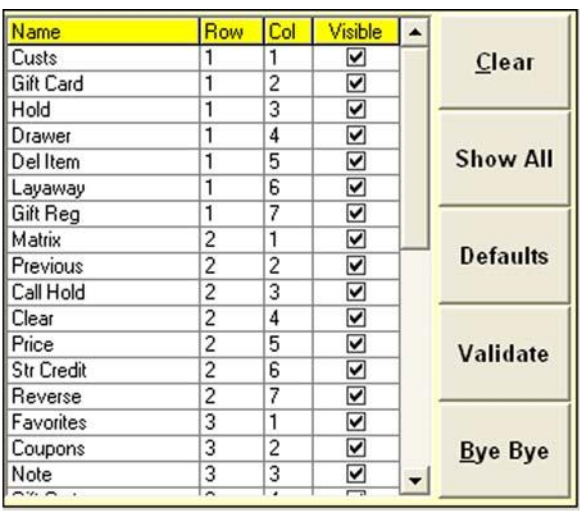
Custom Button: To the immediate right of the QTY button is a configurable control button that can have variable functions depending on what it is set to. In the setup module, POS tab - the “External Program” dropdown box sets the function of this control button.



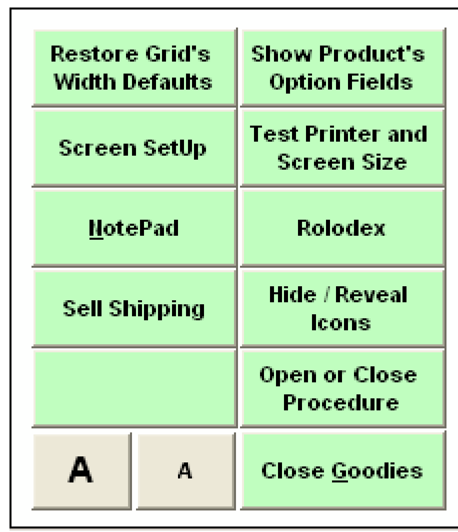
Goodies: The goodies button contains an interface to adjust the appearance and attributes of the POS screen.

Restore Grid: Sets the POS display area's grid back to default size.
Show Option Fields: Displays the contents of the four user-defined fields for the currently highlighted item as well as the items group information.

Screen Setup: Opens the screen setup window shown here. This allows you to hide certain control buttons that you do not want to display to the sales reps. To hide buttons, remove the checkmark from the "visible" column. The Row and Col fields allow for the rearranging of the buttons. Row refers to the button's position vertically while Col refers to the button's horizontal position in the control grid. For example, a button set to Row 1, Col 1 would be in the top left corner. Row has a maximum value of 5 and column has a maximum value of 7; allowing for 35 distinct positions for any of the control buttons.



To return all buttons to their default position - use the "Defaults" button. The "Validate" button will check to make sure that no two buttons are assigned to the same position. The "Show All" button makes every control button visible.



Test a Printer: Sends a test page to a printer to verify functionality.

Notepad: Opens the windows notepad application.

Rolodex: Opens the VRP Rolodex.

Close Goodies: Hides the goodies control screen.

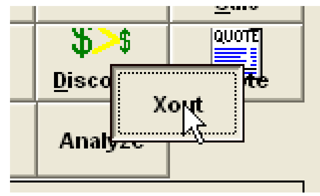
A and a: Adjusts the size of the letters in the POS screen display area. Clicking on the large A button will increase the size of the text in the display area, and clicking on the small A will decrease the size of the text.

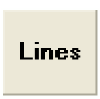
Sell Shipping: Adds a shipping product to a sale in progress for mail-orders.

Open or Close Procedure: Performs an Open Register transaction to place cash in the drawer at the start of a day - or a Close Register Transaction to zero out the drawer at the end of the day. This module also contains a report mode to view past opens and closes. Opens that match the dollar amount of the previous day's close are flagged as "OK".

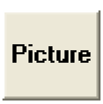
Dragging Buttons

The grid buttons can also be rearranged by dragging them around. When the Goodies > Screen Setup window is open, click on any of the 35 control buttons in the grid and drag them to their new location.





Lines: This button reduces the height of each line in the display area to 1 character height. This is useful to show more items onscreen at one time if there are many items attached to a single sale.

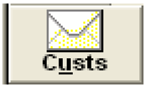


Picture: Displays the product photo when product photos are properly set up and configured. A graphic file must exist in the defined product pictures folder with a filename that matches the productID. For example, a product with the ProductID CC3851 would have an associated picture file of CC3851.xxx. Where xxx represents the file extension for that file type. (jpg, gif, tif, tga, bmp, etc)

When the picture appears, it displaces the control buttons. To return the buttons to the screen, click on the "Hide" button at the bottom of the POS screen.

Configurable Controls

The 35 control buttons in the grid can be shown or hidden based on the configuration in screen setup.



Customers: This button opens the customers window where you can attach a customer to the current sale, or manage customers. See **“The Customers Module” on page 43** for a detailed explanation of how to use this screen.

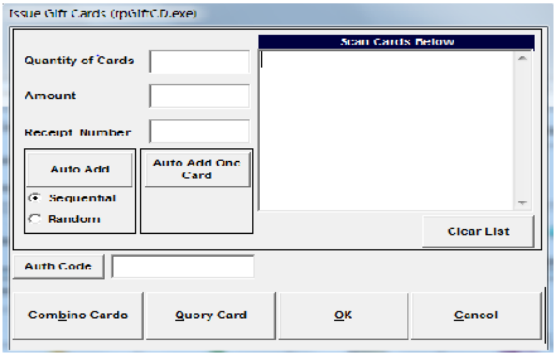
Gift Card: The redeem gift card button opens the gift card as tender window shown here. This allows for a customer who has received a gift card to make use of it to pay for, or help pay for a sale. Enter or scan the gift card number in the “Gift Card” field. Enter the amount of money to use from the gift card in the amount field. The Current Card Balance displays showing the amount of credit left on the gift card.

Additional information on the use of gift cards can be found at “Using Gift Cards” on page 34

The **Utilities** button opens the window shown below (Issue Gift Cards), where you can cre-ate new gift cards. Enter the number of the card to issue in “Start at Card”, the number of gift cards to create in “ Quantity of Cards”, the amount (dollar value) for each card in the amount field - and enter the receipt number for the transaction where the money for the gift card was taken in.

Combine Cards: Allows you to combine the balances of two or more gift cards (two at a time) into one card.

Query Card: Looks up a gift card in the system and displays the current balance, as well as any transactions made on that card.



Recalc: Recalculates a gift card’s remaining balance based on the starting balance and transactions that are attached to that gift card number.

Lost Card: Adds a transaction to the current gift card effectively zeroing out the balance. The transaction is recorded with a negative receipt number. This is used to cancel lost or stolen gift cards.

Hold: Places the current transaction on hold. The system prompts for a hold name when this button is pressed. The hold name identifies the transaction and is used to restore the transaction to the screen when using the call hold button. **Items placed on hold are flagged in the LOOK screen.**

Call Hold: Re-loads a transaction that was previously placed on hold. A dialog box prompts for the hold ID that you created when you placed the transaction on hold initially.

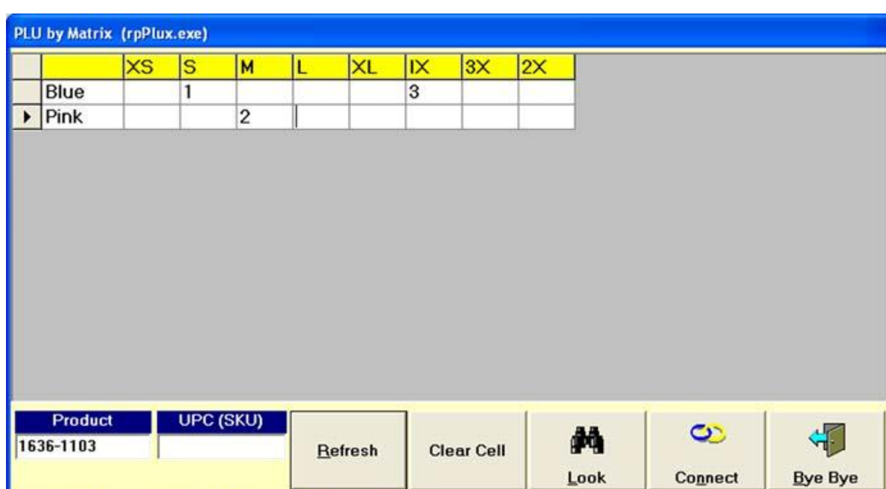
Drawer: Opens the cash drawer and records a “No Sale” transaction if the current user has the necessary security permission.

Del Item: Removes one currently selected (scanned) item from the current transaction. The Pre-finalize void report will display items that have been removed from transactions by this button prior to the sale being completed.

Layaway: Opens the layaway screen, which is explained in detail in “Layaways” on page 55.

Gift Registry: Opens the gift registry screen, which is explained in detail <XREF>

Matrix: This button allows you to add products to a transaction with a matrix style grid (shown below). Enter the **ProductID** of the item in the scan window (yellow box) and press this key. Enter the quantity of each size/color that you want to add to the transaction in the boxes that line up with the desired size/color combination. When you have entered all desired quantities, press the **Connect** button.

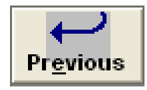


The **Refresh** button reloads a product if you change the productID or UPC in the fields to the left of it.

The **Clear Cell** button deletes the contents of the currently selected cell.

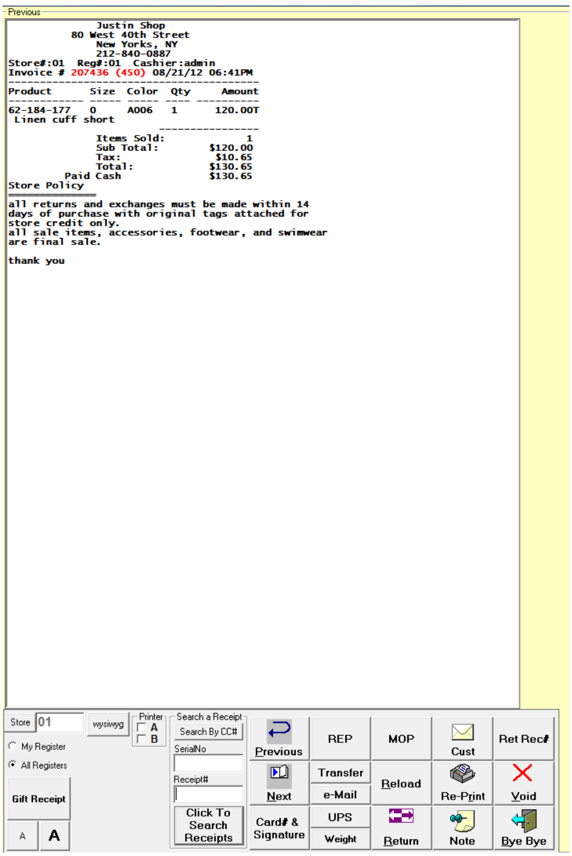
The **Look** button opens the standard Price Look up window.

Bye-Bye closes this window.

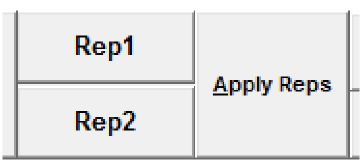


Previous Transactions: This button opens the previous transactions window where you can search through old receipts. The previous screen (shown below) displays the receipts as they print. Receipts can be browsed in order using the **previous** or **next** buttons; or a specific receipt number or date can be searched for by entering that number or date in the field above the **find** button and selecting the find button.

Ensure that you have the correct store and register number selected to the left - a receipt will be returned from a search only if it was issued by the register selected. To search through all receipts, select the **all registers** checkbox.



The **Transfer** button is used to initiate an inventory transfer from another location to the location where the terminal is. This is used mostly for stores that sell goods that are warehoused in a different location. Enter the store code for the source location of the items - and a transfer transaction will be recorded of items being sent from the selected store to your store.



The **REP** button allows you to change the sales rep assigned to that sale. Click the Rep button, a window pops up showing the two available "rep" slots. Click on one of the grey buttons to assign a rep to slot 1 or slot 2. Select OK to save the changes or cancel to abort.

The **MOP** button allows for the change of method of payment. Select the old method of payment from the dropdown box at the top of the dialog box, and the new one from the bottom.

Changing 2 different methods of payment to the same method of payment is possible, though each separate payment on the transaction remains split. If you changed two $50 charges from two different credit cards both to cash, for example, the receipt would show: Cash: $50, Cash $50.

The CC number button displays the customer's credit card number if the transaction was run through with either Paymentech Netconnect or PC Charge.

The **Reload** button brings the items contained on the currently displayed receipt into a new transaction.

The **Return** button re-loads the items on a receipt into a new transaction and automatically reverses each item to a return transaction.

The **Void** button voids the currently displayed receipt.

Re-Print: Sends the receipt to the printer.

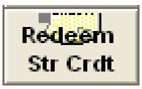
Check the "Gift Receipt" checkbox to hide price information on the receipt.

The **Note** button displays any notes that have been entered for the current transaction.

The **Custs** button opens the customers screen where you can attach a customer to the transaction, or change the customer that is already attached. This is similar to the customers interface described in “Customers” on page 43.

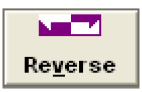
Clear: Cancels an in-progress transaction and clears the POS screen.

Price: Opens a dialog box where you can set a new price for the currently selected item.



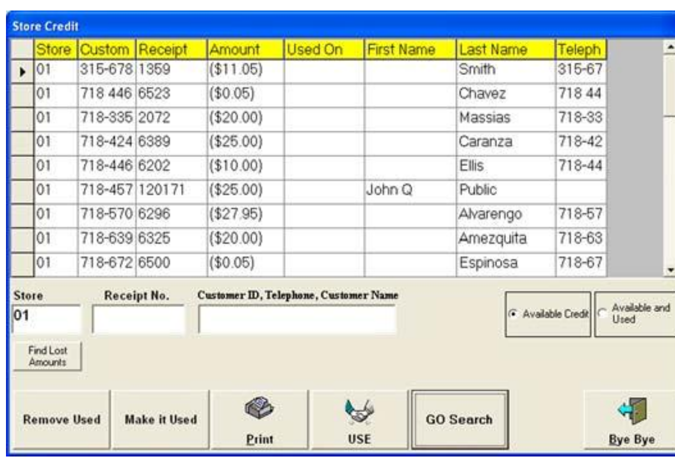
Store Credit: Opens the store credit window. This window allows for the viewing and editing of store credits that have been issued. To display a list of store credits, enter a store number, receipt number, name, phone number, or customer ID in the search fields.

The **Use** key adds the currently selected (in the top part of the window) store credit to the current transaction as tendered currency. The Make used / Remove Used edits the used status of the store credit. Make used sets a store credit to used without attaching it to a particular sale. The **Remove used** button removes the used status from a store credit, enabling it to be used again.



Reverse: When a line item is selected in the upper part of the POS screen, this button reverses it from a sale to a return - or from a return to a sale.

Favorites: Opens the favorites screen from which you can select an item defined as a favorite. Favorites are useful for items that sell frequently, allowing the cashiers to add them to a sale quickly. The favorites screen displays a grid of products that are part of the “Favorites” selection with the product photo (if present.) Using a touch-screen monitor or mouse, click on the photo or text for the item and the “connect” button to add it to a sale.



Items on the favorites screen are subdivided by groups - and a listing of all groups present in the favorites list is shown to the right of the screen. Click on the group name to display the favorites from that group.

To add multiple favorites at once select the “Multiple” option button and click as many items as you need to add to the sale - then the connect list button.

Adding a Favorite Item: The easy way to add an item to the favorites list is via the “Inventory” screen. Browse to the item you wish to add, and press the “Zoom” button. The Add Fvrt button makes the necessary change - then click **Save** to save the change.

Another way to add an item to favorites is to set the “User Defined 4” field to F.

Coupons: Opens the coupons window where you can choose one of seven pre-defined coupons to apply to the current transaction. Coupons are defined in the “Coupons List” option from the POS menu at the top of the screen.

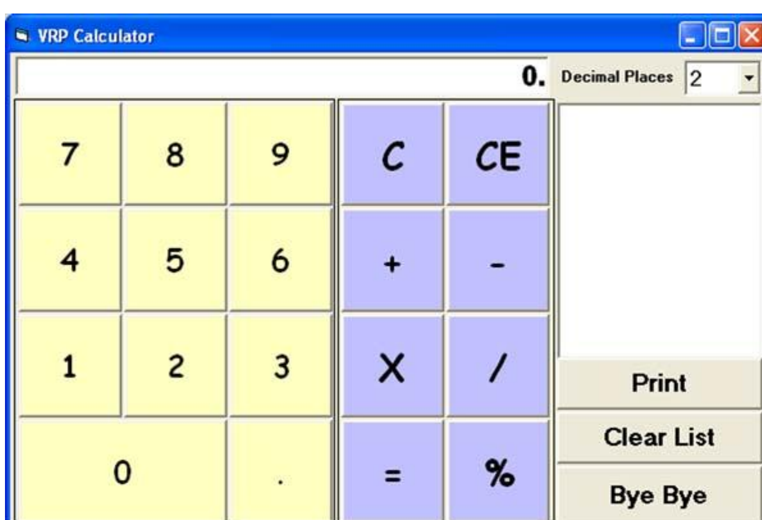
Note: Adds or edits a note attached to the current transaction.

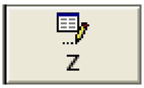
Gift Card: Creates a gift card (or gift certificate, depending on which option you are configured to use) sale, and prompts for the amount. Gift cards must be sold separately from other items. **Note:** In order to redeem gift cards, a method of payment needs to be defined for gift cards. See “Gift Certificate Setup” on page 87 for instructions on this procedure.

Transfer: Opens the transfers module to move inventory between stores. See **“Transfers” on page 51** for a detailed explanation of the transfers module.

Cost: Displays the cost of the item (what your store paid for it.)

Calculator: Opens the VRP calculator.

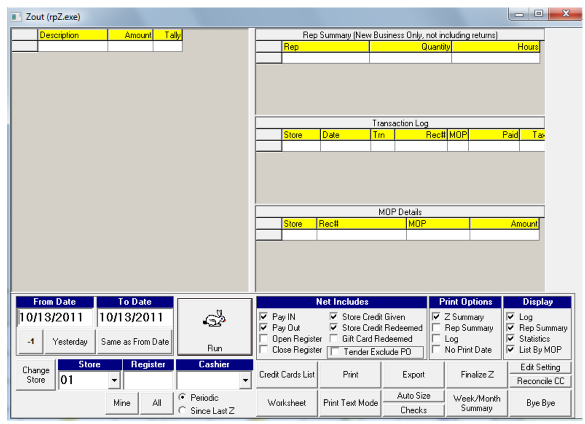




Z out: Opens the Z-out module where you can perform periodic summary operations to see how the store is doing that day, or close the register for the day (Z-out). Select the Periodic Summary radio button to display a list of information without closing the register. Select Z-out to close the register for the day.

Historical summaries can be viewed by entering a prior date.

.



From Date: Enter the date from which transactions will be tallied.

Fig 1.17 - Z Out

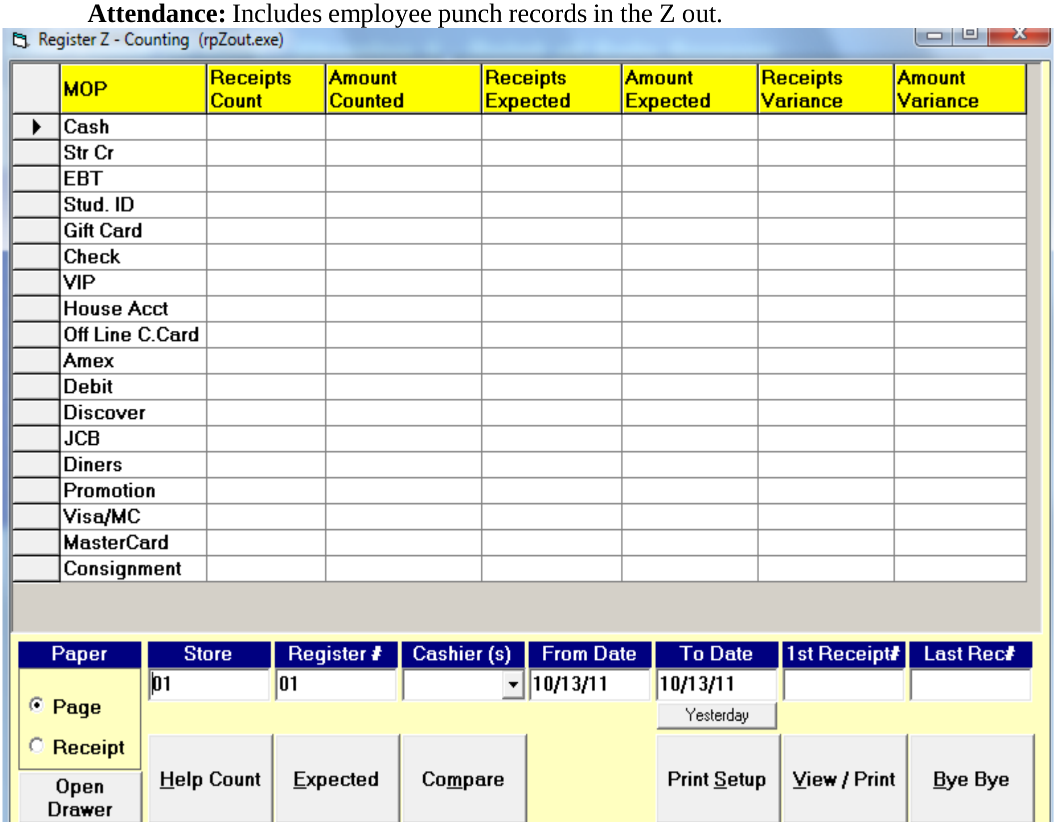
Up To Date: Enter the last date of the time period to tally transactions for. If set to the same as the From Date the system displays one day worth of totals.
-1: Moves the From Date field back one day.
Yesterday: Sets both From and "Up To" dates to 1 day earlier than the present time.
Rep Summary: When enabled, the Z-Out receipt includes totals summed by sales rep.
Show Details: Includes a list of individual transactions with receipt number, method of payment, and amount.
Log: Prints transaction detail information on the Z out receipt.

```
Transactions Log
----------------

6/10/2004

   Rec# Tr   Qty            Paid        Tax       Discount MOP
  3974 CO     5           $50.00      $0.00         $0.00 C
  3975 LP     0           $50.00      $0.00         $0.00 C
  3976 LP     0          $100.00      $0.00         $0.00 C
```

Attendance: Includes employee punch records in the Z out.



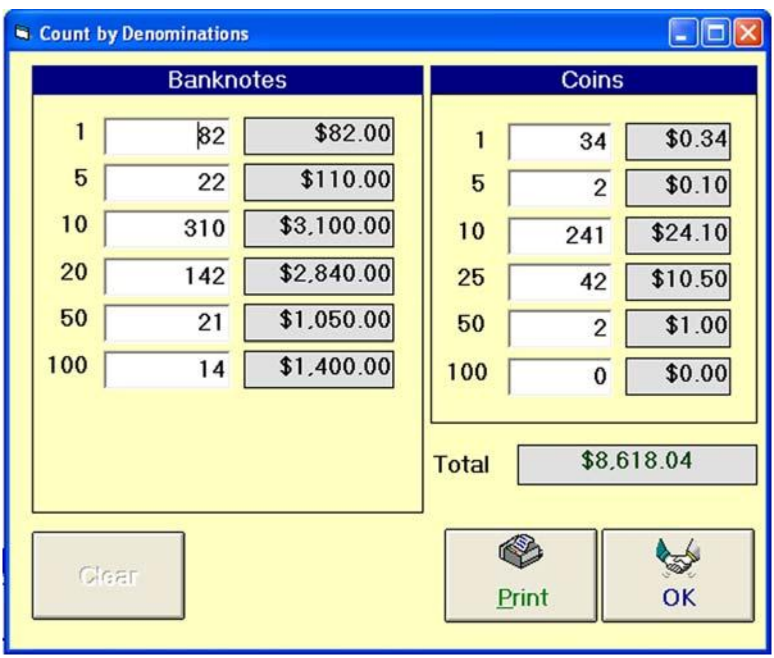
Z-Out Worksheet

The worksheet button opens a window where you can compare the paper receipts from the day to the information recorded in the system. Enter the receipt count and tallies for each method of payment. The "Expected" button populates the expected count and expected total fields with the transaction information that is recorded in the system. The compare button calculates and displays any overages or shortages.

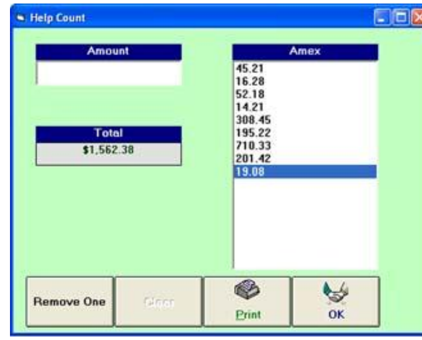
Help Count: Opens the help count window.
Expected: Fills in the expected receipt count and amounts for the specified time period.
Compare: Calculates the difference between expected and actual figures.
File: Exports the worksheet to a file.
Print Setup: Select options included on the print out.

View / Print: Displays the Z out report (with the options selected in Print Setup) with the option to print the report.

Help Count

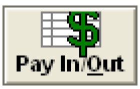


The help count screen facilitates tallying of currency bills by translating the number of bills into an amount. Enter the number of bills and coins of each type in the white fields. When all quantities have been entered - the OK button moves the total to the worksheet grid.



For non-cash currencies, the help count screen functions in much the same way as an adding machine. Enter each amount one by one, pressing <enter> after each entry. The amounts are entered into the list at the right and tallied. When finished, press the OK button. The number of receipts and total amounts are transferred to the worksheet view for that currency type.

If an error is made, select the erroneous amount in the list at right and press the “Remove one” button.



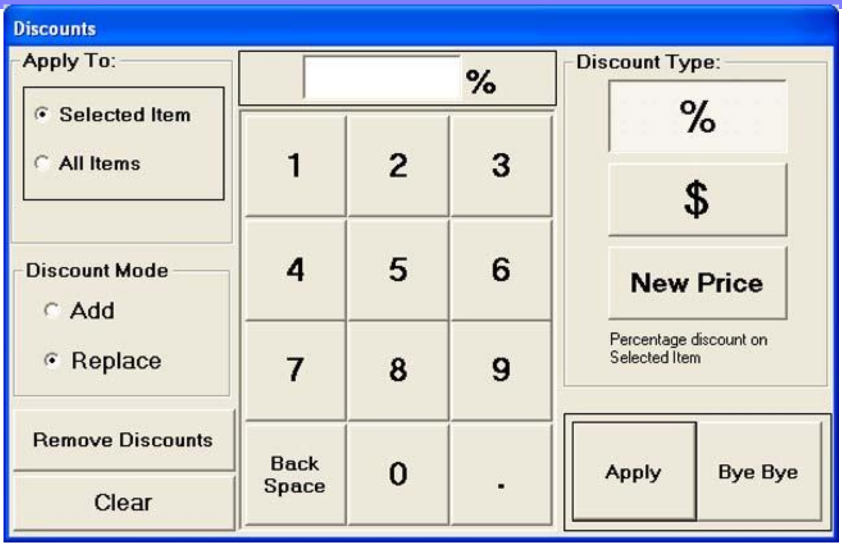
Pay In / Pay Out: Opens the Pay In / Pay Out window where you can add or subtract cash to the drawer. In most cases a Pay In is performed at the start of the day to add cash to the drawer. When excessive cash has built up in the drawer and needs to be removed to the back office, a pay out transaction tells the system that money has been removed from the drawer.

Pay outs can also be used to remove cash from the register to pay vendors, maintenance workers, petty cash, or whatever else is deemed a valid reason. In all cases a receipt is generated.

Tax Included: When the sale price of items already includes the tax, this button will apply a “discount” to the sale equal in amount to the tax due. The system records tax collected, though the total sale amount does not contain additional tax.

Orders: Opens the customer orders module. See “Customer Orders” on page 59 for more information about customer orders.

Discount: Opens the discounts window where you can edit or add a discount to the currently selected item. Discounts are available in three types: The **%** button uses percentage based discounts, the **$** button applies a “dollar-off” type of discount, and the **new price** button changes the sale price of the item to a new amount. For example, if an item was selling at $100, putting 50 in the discount amount field (Top center) while in % mode would apply a 50% discount (the item would sell for $50.). Putting 50 in the amount box and using a dollar off discount would subtract 50 from the cost (product would also sell for $50). Using the new price button, and placing 50 in the amount field would cause the item to use the sale price of $50. In this example, all three modes result in the same price. If, however, you are dealing with less regular numbers - say a product that was selling for $1384 - and you needed to make it sell for $1200 - it would be easiest to use “new price.”

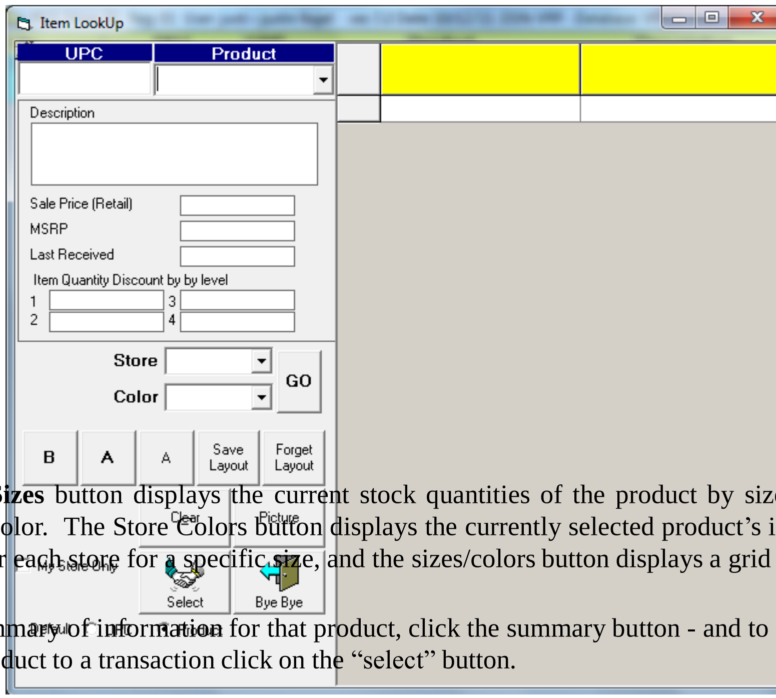


The **Selected Item** or **All Items** option determines if the discount that is entered is for only the currently highlighted item, or for the entire sale.

Add / Replace: Determines if the discount adds to an already present discount or over-writes it. For example, if an item is already under a 10% discount, and you enter 20% with add, the item will experience a 30% discount. If you use replace, the item will use a 20% discount.

Quote: Prints a receipt for a price quote without finalizing the transaction and performing currency exchanges. No financial totals are effected by a quote.

Opens a product look up window where you can search for a product to add to the sale. In the JustLook window, the ProductID or UPC must be entered exactly.



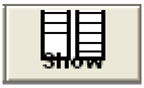
The **Store Sizes** button displays the current stock quantities of the product by size in all stores for a specific color. The Store Colors button displays the currently selected product's in-stock quantities by color for each store for a specific size, and the sizes/colors button displays a grid of both size and color.

To see a summary of information for that product, click the summary button - and to add the currently selected product to a transaction click on the "select" button.

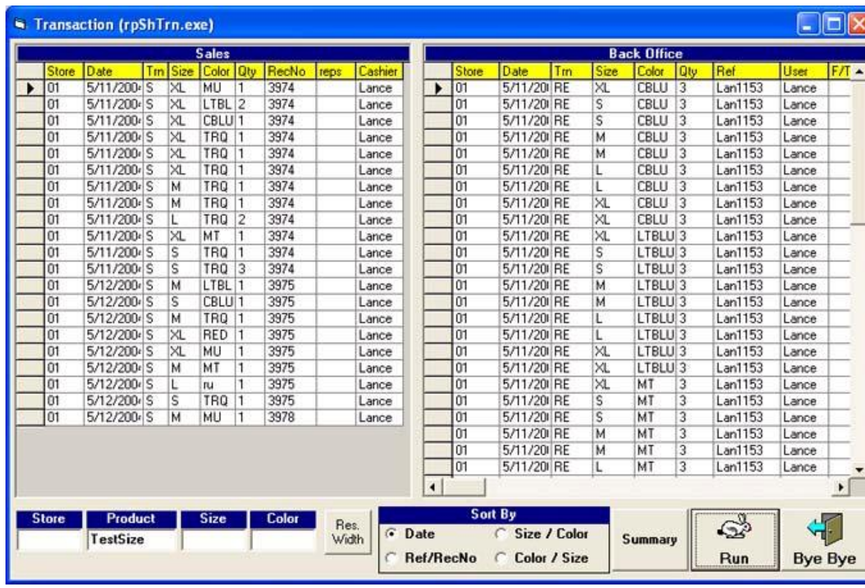
Repairs: Opens the repairs module where items can be logged has having been sent back for repair to a manufacturer or repair shop. Greater detail concerning the repairs module can be found in a later chapter.

Punch Clock: Opens the time clock module where employees can clock in and clock out. See the Back Office manual section on Time & Attendance for more information concerning this feature.

Keyboard: Displays an onscreen keyboard enabling touch-screen users to enter text without a keyboard.



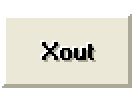
Show: Opens a window that shows transaction information for items. If an item has been scanned/entered into the current transaction it will be displayed by default when this screen opens. Select the **Run** button to display information pertaining to transactions that occurred with that item.



Entering an alternate ProductID on the product line, size, or color will cause the screen to narrow the displayed information to suit the entered search criteria.

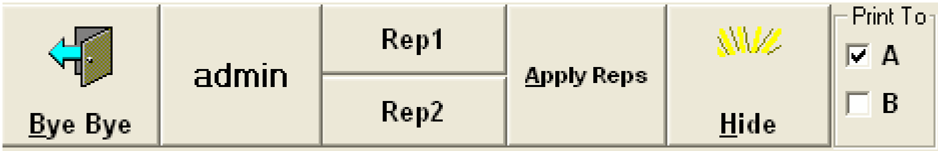
The summary button displays a quick summary of the number of transactions that occurred for that item.

Analyze: Displays a brief inventory analysis of the currently selected item. This includes current on-hand count as well as quantities sold for the item.



X-Out: Displays a quick summary of the day's earnings, split up by currency type and totalled.

More Controls:



Additional controls at the lower left corner of the Point of Sale Screen are pictured here. The Bye-Bye button exits the POS screen and returns to the main menu. This option can be password protected in the security setup to prevent unauthorized users from gaining access to the main screen.

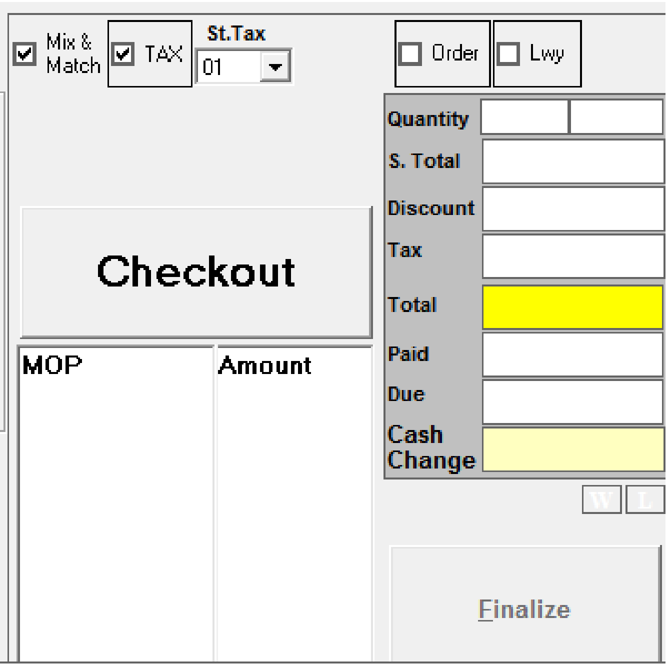
The button immediately to the right of the Bye-Bye button is the **Login** button. The button displays the username that is currently logged into the system. In this case, a user with the username "user" is logged into the system. Clicking on this button opens the login screen where the user is prompted to enter a username and password.

Rep 1 / Rep 2: These buttons allow you to set the names of sales reps that are assigned to this transaction. A common use for this feature is tracking commission sales and sales performance statistics. Click the Rep 1 or Rep 2 button to select a rep username, and click the "Apply Reps" to save the sales rep names with the transaction.

Hide: This button hides the grid of 35 control buttons above this area. When viewing a product photo, pressing this button twice will restore the control buttons that became hidden when the picture was displayed.

Print To: These check boxes determine which receipt printer is used. Receipt printers are defined in Setup > Peripherals Setup. Up to two receipt printers can be defined for each terminal (A and B). If neither box is checked, the system will not print a receipt. If both are checked the system prints to both printers.

Method of Payment Area



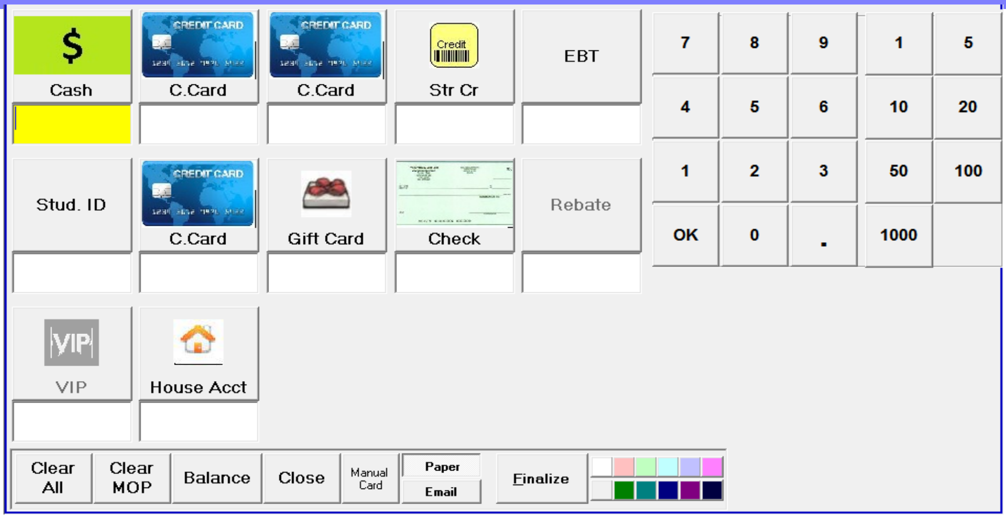
The bottom right of the point of sale screen contains the method of pay- ment selection area as well as a transaction breakdown.

To access the method of payments please first click the Checkout Button. This will open up all the currencies you have defined.

A numeric window appears where you can type in the amount of currency needed. This window is depicted below. The area outlined in red contains "Denomination" but- tons to quickly enter common amounts. If the selected currency type (in this case cash) has defined denominations these buttons will display. For credit cards, and other currency types where there is nothing defined for denominations - the buttons do not appear.

Selecting one of those buttons (for example, the 50) would add $50 and is functionally identical to pressing the 5, then the 0 on the left side.

The **Right** and **Left** but- tons move this amount-entry win- dow to the right or left side of the screen.



The **Clear All** button sets all currencies to zero.

The **Clear** MOP sets the selected MOP to zero.

The **Ok** button closes the amount entry window.

Pressing any of the currencies above automatically fills in the total due.

The **Finalize** button will finish the sale with the selected MOPs.

In the above example, $48.40 has been entered for C.Card. The amounts being tendered for each method of payment will appear in the grid. If insufficient currency is tendered, the system prompts for the creation of a layaway.

Options: Check or Uncheck the Mix & Match checkbox to remove the effects of Mix & Match settings. The Tax checkbox determines if tax is charged on the current transaction

ST Tax: Displays the store ID that the system is charging tax under. In most cases, this should match your store ID at the top of the screen.

Lwy: If this checkbox is enabled, the current transaction is set to be a layaway.

Finalize: This button finalizes the sale and prints out a receipt for the transaction. When auto-finalize is selected in the setup screen > POS tab - this button automatically presses itself when sufficient currency has been received to satisfy the cost of the sale.

2 POS Operation

Basic Point of Sale Operation:

The main function of the POS screen is to allow for the sale of merchandise or services to consumers. The implementation of Point of Sale within Visual Retail Plus consists of the following basic steps to performing a transaction:

1.) **Scan / Add Items:** The items are scanned, manually keyed, or retrieved through "Look".

2.) **Payment:** The amount of the transaction is tallied and a method of payment is chosen and entered.

Advanced Point of Sale Operation:

There is more to the VRP Pos than the basic operation detailed above. The advanced features of VRP include tracking customers, the use of gift cards, store credits, multiple currency types, customer orders, and a myriad of other features not directly related to the POS screen.

Advanced Operation:

Depending on the settings for your system, a customer may be required before any items are scanned (Setup "Customer Required" option enabled) or a customer may be required only for certain currency types. (Currency table, customer required checkbox).

In addition to the steps listed above (Adding items and then taking in currency) advanced options include:

1.) **Attach Customer:** A customer is selected from the customers screen , or created and then selected - and attached to the transaction. If the customer required option is enabled, the sales reps will have to choose a customer from the list before they will be able to scan items into the sales.

2.) **Scan / Add Items:** Enter the items the customer is purchasing.

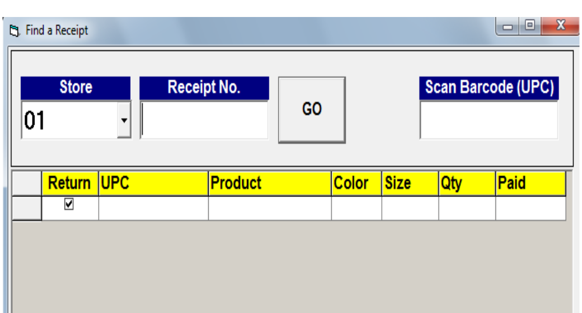
3.) **Discounts / Gift Cards:** Apply any discounts and apply gift card values if applicable.

4.) **Process Currency:** Take and process tendered currency from the customer.

Returns

There are several situations where a return transaction is necessary, each different slightly in how to proceed. This is, of course, assuming that the return is valid and authorized - the following section describes how to perform return transactions in Visual Retail Plus.

The two main methods to enter a return into the system, as a newly scanned transaction or by reloading an old receipt. To return one item out of a receipt that contains many items, it is easier to scan the new item and use the **reverse** button on the POS screen. To return an entire receipt's worth of items it is faster to recall the receipt on the previous screen and press the **return** button. This will re-load all items on that receipt and mark them as reversed.



Using the Reverse: When using the reverse button, the system prompts to locate the receipt information. Check off the items in question and press ok.

Customer Returns One Item:

When the customer returns one item, scan that item into the POS system normally. Then, press the reverse button on the control area to change the item from a sale (positive dollar amount) to a return (negative dollar amount).

An item that is currently being returned has the price displayed inside ( ) marks as shown.

Also, the total area in the finalization window will be lit in red if the net result of the transaction is money out. If the customer is returning only one item and not exchanging it for another - the end result will be money out of the store.

When the item is scanned in, select the appropriate method of payment from the grid and click on the amount key that shows the amount of the return.

In most cases the method of payment that you select will be either the original MOP used to buy the item (straight refund) or store credit. Once the correct amount is entered into the MOP grid (shown here) press the **Finalize** button to complete the sale.

Customer Exchanges One Item:

An exchange is similar to a return with the exception that the customer is returning one item and buying a different item. The procedure starts off the same as the return from the previous example, however before you select the Method of Payment and finalize the transaction - you scan in the new item.

SalePrice	Line Total
$154.00	($80.00)
$154.00	$115.50
$154.00	($103.18)
$154.00	$80.00
$7.00	$7.00
$29.50	$29.50

Advanced Returns/Exchanges:

Often, transactions are not as simple as the examples above and you will encounter situations where a customer is returning multiple items and exchanging them for several different things. The section of the POS line item area shown here is an example of a transaction with seven items - two of which are being returned.

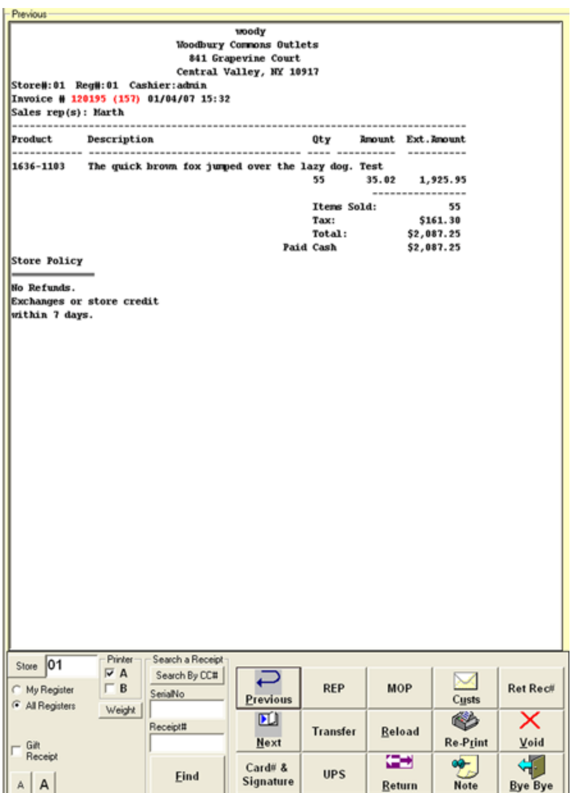
Items that have a “Line Total” enclosed in ( ) marks indicate a return. The first and third lines show items that are being returned while everything else is being processed as a sale.

When the return button is selected while a transaction with more than one item is shown - the system prompts to determine if the reversal is for only the currently highlighted item - or if it is the entire list of scanned items.

Note: Differing Line Totals for items with the same sale price are due to different discount percentages applied to each item.

Return Receipt Required

If the system is configured to allow returns only from a receipt, the returns must be done from the “**Previous**” screen. Enter the receipt number of the original receipt - or if it is recent enough scroll to the original receipt with the previous and next buttons.



Once you have the original receipt displayed on the screen - press the **Return** button to start a return transaction. When the receipt required option is set, you will not be able to change the Method of Payment that is returned to the customer.

Only the original MOP can be used for the return. If the original sale was made with a credit card, you **must have the original credit card** present to apply the refund

Likewise, if the method of payment was cash, the system will only allow a refund of cash. (Unless the system has been set up to convert all cash refunds into store credits).

Functions:

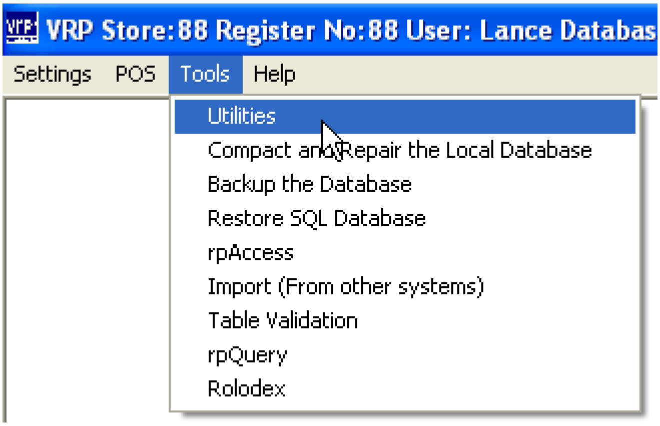
Ret Rec#: When viewing a return receipt - this button displays the original receipt number.
Previous: Moves back one receipt.
Next: Moves ahead one receipt.
Rep: Change the sales Rep attached to the receipt.

Mop: Change a method of payment that was used on the receipt.

Transfer: Load the items on the receipt into a transfer.
Signature: View a credit card signature. (Requires signature capture hardware)
Reload: Loads the items on the receipt into a new sale.
Return: Loads a return transaction of the currently displayed receipt.
Custs: Opens the customers screen, from which you can connect or change the customer attached to the currently displayed receipt.
Re Print: Prints the displayed receipt again.
Note: View or edit the note attached to the currently displayed receipt.
Void: Voids the currently displayed receipt.

Custom Forms

Depending on the nature of your business, it may be necessary to append certain custom information to receipts. For example, a store that sells custom-made picture frames may need to note the height, width and shape for a product at the time of sale. In this example, the store has a separate product listed in inventory for the style of the frame - however these are not pre-made frames. Each time a customer purchases one of these frames the sales person must record additional information about the item.

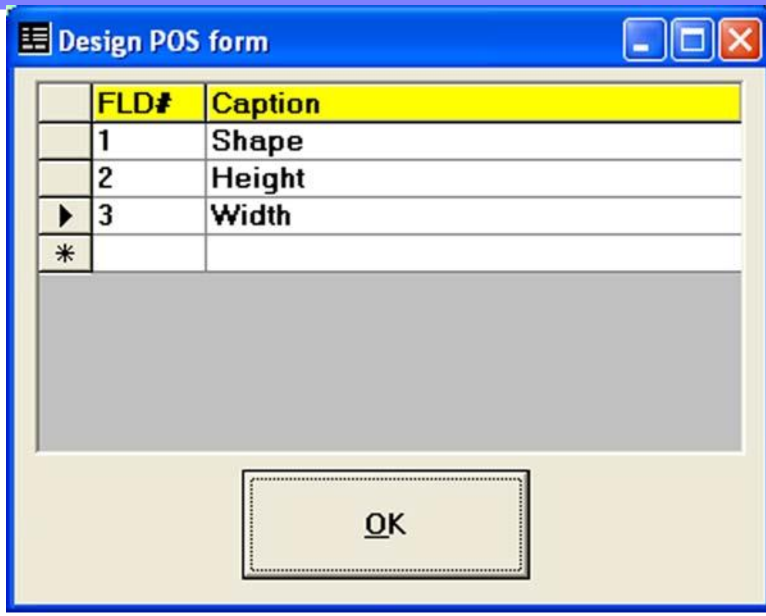


Setting up Custom Forms

Configuring your system to use custom forms is a two-step process. The first step is to enable the use of custom forms in the **Setup** screen. On the POS tab, near the bottom of the screen - the “External Program” option needs to be set to rpcstfrm.

Once you have set the external program to rpCstFrm, press the update button and go to the Tools > Utilities option from the menu at the top of the screen.

The final, and most important, step is to define the contents of the custom form. Select the **POS Form Designer** button from the utilities menu - to open the following screen:



It is on this screen where the fields are defined for the custom form. In the case of this example of the frame store - they need to record the shape of the frame (square or oval), as well as the height and width that the customer needs the frame made in.

The style of the wood, pattern, and color are all determined by the product - however the shape, height, and width are not known by the system as they will be different for every frame sold. Setting up the custom form in this screen, the owner creates a field for each of these three parameters.

Using the Custom Form

When an item is scanned at the register, the clerk will be asking the customer for the size

and width they need. For the case of our example store - each item represents a particular quantity of framing material and based on the size of the frame desired, they charge for a number of quantities of that item.

With the custom form defined, the cashier rings up the appropriate quantity of framing material units - then presses the "rpCstFrm" button on the POS screen. This causes the custom form to be displayed.

The cashier enters the data for the fields that were defined in the POS Custom form utility. Each of the defined fields appears on this form to accept information from the operator. Data that is entered here is recorded with the sale transaction and is visible on the receipt for that sale.

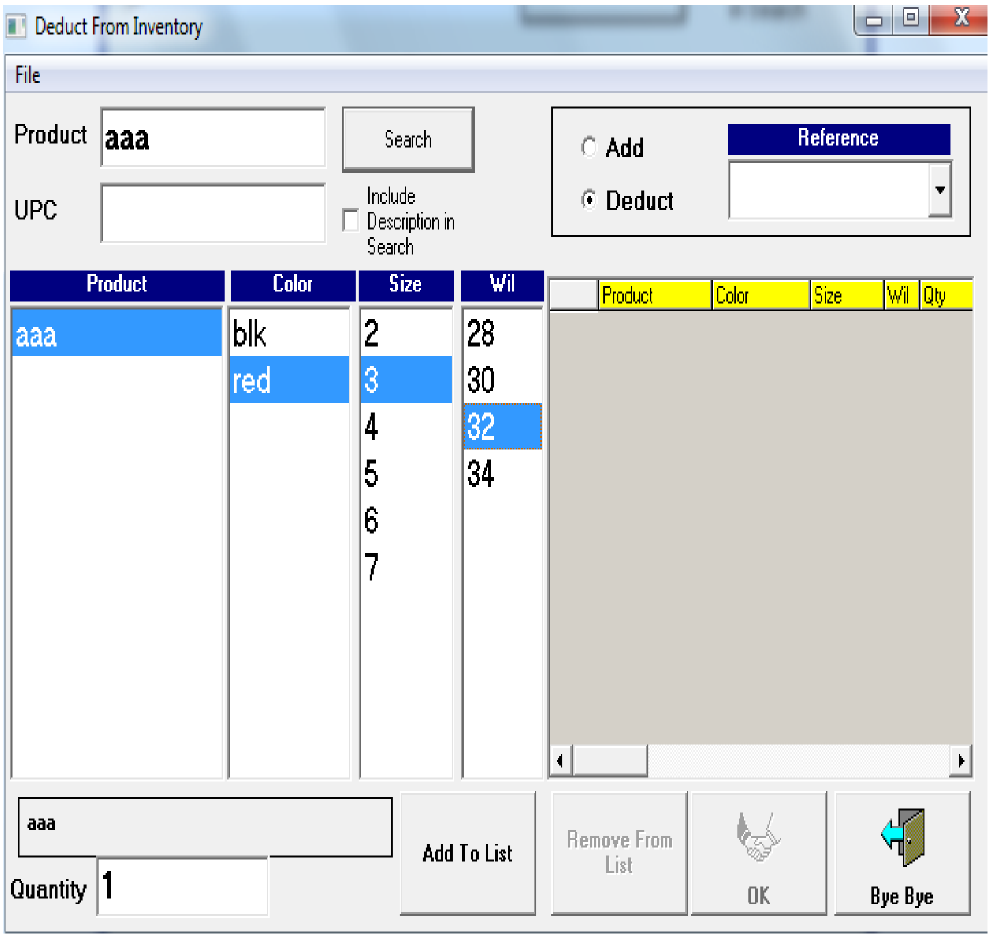
```
            452 Hudson Terrace
        Englewood Cliffs, NJ 07632
Store#:88  Reg#:88  Cashier:Lance
Invoice # 3977 (16)  6/11/2004 13:29
----------------------------------------
Product      Size  Color  Qty    Amount
------------ ----- ----- ---- ----------
BEE0195
            @ $12.95     5       64.75T
 Beechwood Framing Mtrl - 3 foot
   Shape: Rectangle
   Height: 42 inches
   Width: 50 inches
                        ----------------
              Items Sold:             5
              Sub Total:         $64.75
              Tax:                $6.48
              Total:             $71.23
         Paid Cash               $71.23
Store Policy

Thank you for shopping in our store.
All sales are final. No refunds, no
```

POS Inventory Deduct

Items can be removed from on-hand inventory for uses such as in-store samples, demonstrations, and other situations where cashiers take an item from stock for in-store use. Cashiers do not need access to the inventory management system to perform the deduction, from the Point-of-Sale screen the POS Deduct function is accessed from the right-click menu.

Right-click the mouse in the item display area and select **POS Deduct** from the menu.



Enter the ProductID (Style number) and click the search button. Item descriptions are

searchable when the "Include description" checkbox is enabled. When a product is selected in the left window, available colors, sizes, and (if used) WIL are displayed. Click on a Color, Size, and (if needed) WIL. Enter the quantity to be deducted from inventory in the "Quantity" field. Enter a ref-
erence number if needed (the system auto-creates if none is provided) and click **Ok** to deduct.

3 Gift Setup

Visual Retail Plus supports the use of either gift certificates or gift cards to allow for customers' friends and relatives to receive gifts from your store without being given a specific item that they may not care for.

Gift Certificates and gift cards are similar in function, however only one mode of use can be employed with Visual Retail Plus. Either Gift Cards or Gift Certificates are used, not both. The main differences between the two are illustrated below:

Gift Card: A gift card is usually represented by a credit-card sized card, which bears an identification number. A physical card is not required for the use of this mode of gift item, however it is reccomended that some manner of card be used. Gift Cards can be obtained pre-printed from various printing companies with numbers either in numeric or bar-code format.

Gift cards carry a running balance that is attached to a particular gift card number. The gift card remains usable so long as there is a remaining balance on the card. Using a gift card at the time of purchase lowers the remaining balance by the purchase price of the items. Extra money remains on the gift card to be used at a later date. (Note: gift card balances can be converted to cash change or store credit if desired by the management.)

Gift Certificates: A Gift certificate is generally printed on paper, either receipt tape (basic) or larger paper (from plain white copy paper to fancy embossed, depending on your printer hardware). A gift certificate differs from a gift card primarily in that it is expected to be used all at once. While a gift card carries a balance, the certificate is used all at once - or converted to change / store credit at the time of redemption.

Configuring VRP to use Gift Cards

The most important configuration step in getting the system to process gift cards is to define the gift card method of payment. Without this, you will be unable to redeem gift cards when someone brings one back to use for a purchase.

In the currency table, create a new entry for the gift card currency type, select a single-letter code for it (Default is G), do not check the "C.Card" box, do not check "Kick", and set the denomination fields to 0. Click one line up to save the changes, and press the “Bye Bye” button.

For additional information about working with the currency table, see the Back Office Manual section on the Currencies Table.

In the Setup Screen, search for the setting “UseGiftCard” and set it to Y. Next, set the parameter “GiftcardMOP” to the appropriate currency code (typically G)

Store Credit is Gift Card: When enabled, any store credit that is issued takes the form of a newly issued gift card.

Change for GC is Store Credit: This disables the feature of gift cards to carry a running balance, causing unused funds on the gift card to be automatically converted to a store credit when the gift card is used. If you wish to allow your customers to carry a running balance on their gift cards, do not enable this option.

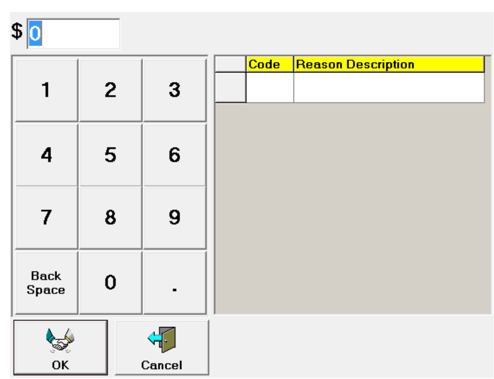
Using Gift Cards

The use of gift cards is a two-step process. In simplest terms, a gift card is sold and created in the system, then at some later point - redeemed at the store. The “life cycle” of a gift card is explained herein.

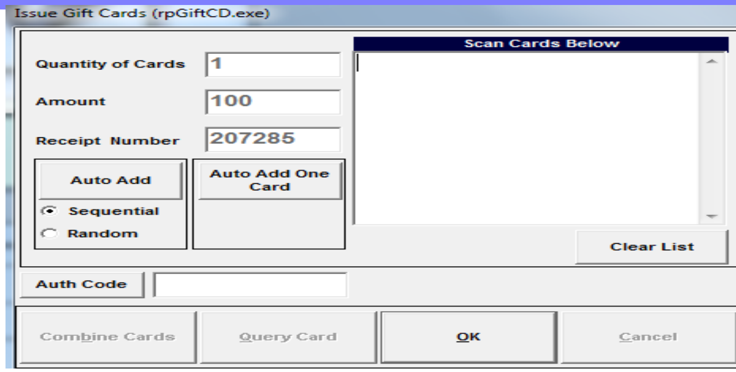
Selling the Gift Card

To sell the gift card, the operator presses the “Gift Card” button in the POS screen.

This creates a sale transaction containing a gift card item. The system prompts for the dollar amount of the card; in this example - a gift card for $150 is added to the transaction.



Complete the sale as you would for any other item. Following the receipt print, the gift card issue window opens:



If you are using pre-printed gift cards, type or scan the number on the card in the topmost field (Start at Card). When accessed from a sale transaction, this screen does not allow for the creation of more than one gift card. Using this utility separately, sequential gift cards can be issued en masse.

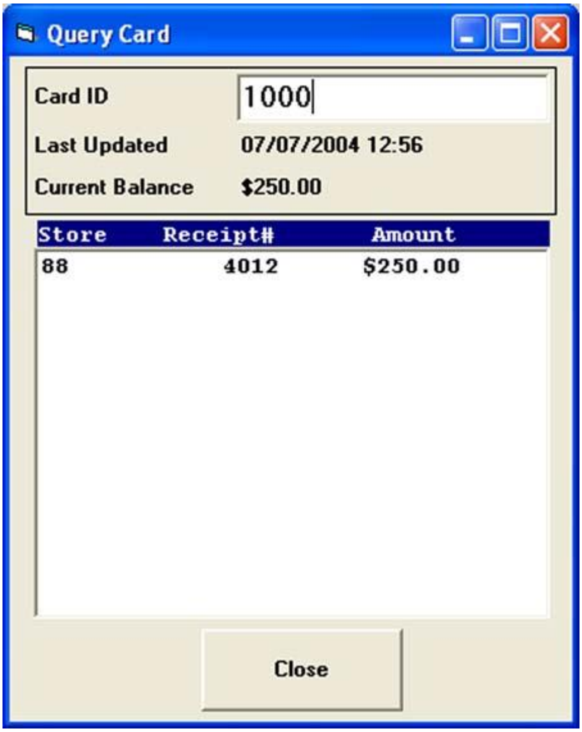
When the card number is entered, the OK button saves the gift card information.

The issue card utility can be access from both the POS screen (Redeem gift card window) utilities button - or via the **Tools** > **Utilities** menu. Entering the issue utility in this manner allows for the mass-issue of any desired number of gift cards. The number entered in the "Start at Card" field is the first (lowest) numbered card issued. Subsequent cards will increment up one from that point.

For example, Entering 1000 in the "Start at Card" field, and issuing 10 cards (entering 10 in "Quantity of Cards") would generate cards 1000, 1001, 1002, 1003 - and so on through 1009. (Card 1000 counts as 1 of 10)

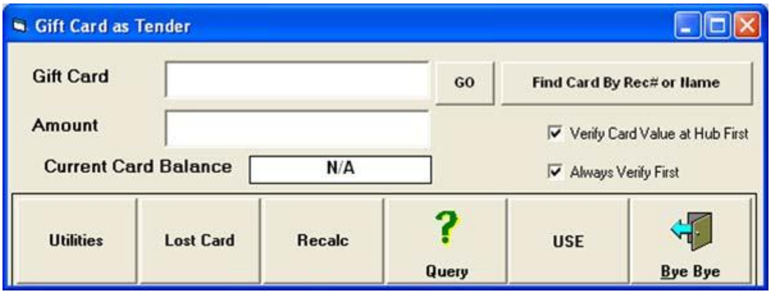
Querying Cards

Currently active gift cards can be searched for in the system from the POS screen “Redeem Gift Card” button. Enter the Card ID (number) and the system displays all transactions connected to that gift card, with receipt numbers.



Redeeming Gift Cards

When a customer with a gift card purchases merchandise and wishes to use the gift card to pay for, or help pay for it; use the “Redeem Gift Card” button from the POS screen once all items have been attached to the sale.



For stores that have multiple locations and **have a vpn connection set up between the office and the stores** a gift card’s balance can be checked throughout the system. The “Verify Card Value at Hub First” option instructs the software to check the outstanding balance of that gift card against the main office computer. In the event a customer attempts to use a gift card at one location, then use it again at another location in the same day - this can check to see that the gift card was already used. Enter the card ID and click the “GO” button to check the balance at the hub.

When the correct card has been selected, press the “Use” button to add funds from the gift card record to the current transaction. The amount of the sale (if the sale is less than the current balance of the gift card) or the amount of the gift card (if the sale’s total is higher than the card’s balance) is entered in the method of payment grid in the currency defined for gift cards.

If no Method of Payment has been set up in the currency table, or in the gift certificate setup area of the “Setup” screen, the use button performs no action.

This grid shows a sale for $145.20 being paid for with a gift card.

If the sale amount was greater than the balance on the card, additional payment would need to be entered to complete the sale. In this case, the gift card's balance was $250 prior to this transaction - so it satisfies the purchase on its own.

MOP	Amount
Cash	
Debit	
Str. Cred.	
House	
C.Card	
C.Card	
C.Card	
Gift Card	145.2

The query window shown here displays the gift card following the above sale. The initial purchase of the gift card ($250 on receipt 4012) is the topmost transaction, followed by every use of the card after that in chronological order.

Multiple Gift Cards

Multiple gift cards can be redeemed on the same transaction by following the procedure to redeem a gift card a second time. Select the dollar amount from the gift card that you wish to use, it will be added together in the **Gift Card** payment grid. When the transaction is finalized, the money is deducted from both gift cards.

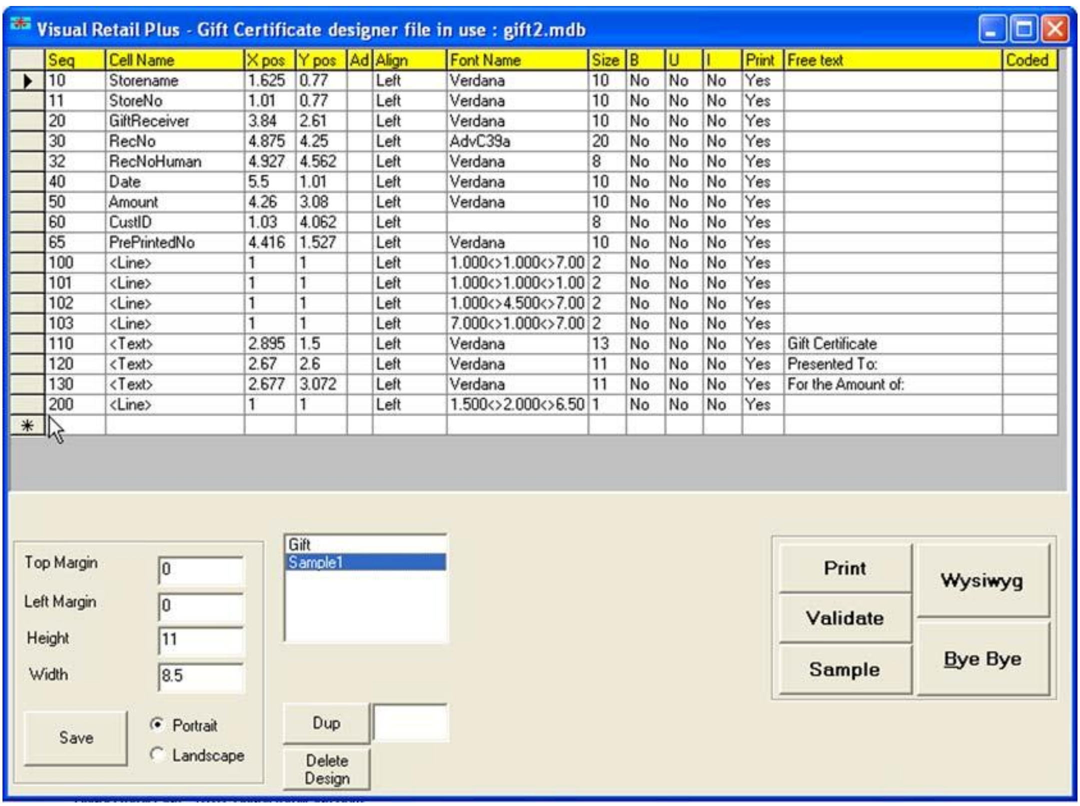
Gift Certificates

Gift certificates are more basic than gift cards, in essence being store credit that is given to someone other than the purchaser. Visual Retail Plus does not track gift certificates in the same manner as it tracks gift cards. Sold gift certificates are considered store credits in the system and are redeemed in the same way as using an existing store credit.

The issuing of a gift certificate is similar to that of a gift card, in that a "gift certificate" item is added to a transaction and then sold. This creates a store credit record in the system.

Designing the Gift Certificate

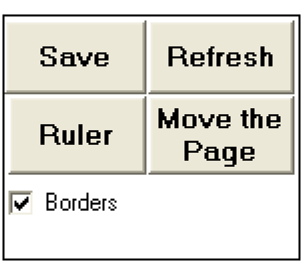
Like tags, gift certificate designs are under the control of the user. The appearance, font, and layout of the gift certificates can be edited in much the same way as the tag designs. The gift certificate designer is available under the utilities menu accessed from the "Tools" option at the top of the screen.



Seq	Cell Name	X pos	Y pos	Ad	Align	Font Name	Size	B	U	I	Print	Free text	Coded
10	Storename	1.625	0.77		Left	Verdana	10	No	No	No	Yes		
11	StoreNo	1.01	0.77		Left	Verdana	10	No	No	No	Yes		
20	GiftReceiver	3.84	2.61		Left	Verdana	10	No	No	No	Yes		
30	RecNo	4.875	4.25		Left	AdvC39a	20	No	No	No	Yes		
32	RecNoHuman	4.927	4.562		Left	Verdana	8	No	No	No	Yes		
40	Date	5.5	1.01		Left	Verdana	10	No	No	No	Yes		
50	Amount	4.26	3.08		Left	Verdana	10	No	No	No	Yes		
60	CustID	1.03	4.062		Left		8	No	No	No	Yes		
65	PrePrintedNo	4.416	1.527		Left	Verdana	10	No	No	No	Yes		
100	<Line>	1	1		Left	1.000<>1.000<>7.00	2	No	No	No	Yes		
101	<Line>	1	1		Left	1.000<>1.000<>1.00	2	No	No	No	Yes		
102	<Line>	1	1		Left	1.000<>4.500<>7.00	2	No	No	No	Yes		
103	<Line>	1	1		Left	7.000<>1.000<>7.00	2	No	No	No	Yes		
110	<Text>	2.895	1.5		Left	Verdana	13	No	No	No	Yes	Gift Certificate	
120	<Text>	2.67	2.6		Left	Verdana	11	No	No	No	Yes	Presented To:	
130	<Text>	2.677	3.072		Left	Verdana	11	No	No	No	Yes	For the Amount of:	
200	<Line>	1	1		Left	1.500<>2.000<>6.50	1	No	No	No	Yes		

The designer screen contains a table-view of the print elements on the gift certificate. The example above is the “Sample1” gift certificate layout that is included with Visual Retail Plus. (If the sample1 design does not appear in the design list, press the “Sample” button to create it.

The sample1 layout in the WYSIWYG view. Items can be dragged around and repositioned (with the exception of lines). PrePrintedNo, GiftReceiver, Amount, CustID, StoreNo, Storename, Date, and RecNoHuman are variables that print their values when the gift certificate is printed - they do not print literally as displayed in the WYSIWYG screen.



The controls box shown here appears on the WYSIWYG view, often right on top of the design you are trying to work on. To reposition the controls box, click on the “move the page” button and then drag the controls window to the desired position.

Save: Saves the design changes made on the WYSIWYG screen.
Refresh: Redisplays the gift certificate design.
Ruler: Enables ruler markings.
Move the Page: After pressing this button, the controls box can be repositioned by dragging it around the screen.
Borders: When enabled, print elements are highlighted with a black border. These borders do not print on actual gift certificates. To see what the final print looks like, disable the borders.

Font & Typeface:

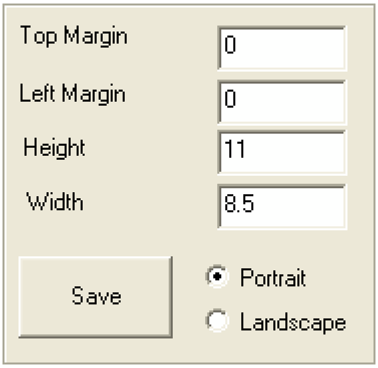
To change the font or typeface of a print element on the gift certificate, enter the desired font name in the table view “Font” column. The “B”, “U”, and “I” columns allow to enable **B**old, **U**nderline, or **I**talic text.

Adding Text:

To add text that is not a variable, enter a new line item with <Text> in the “Cell Name” field. The contents of the “Free text” column appear on the gift certificate.

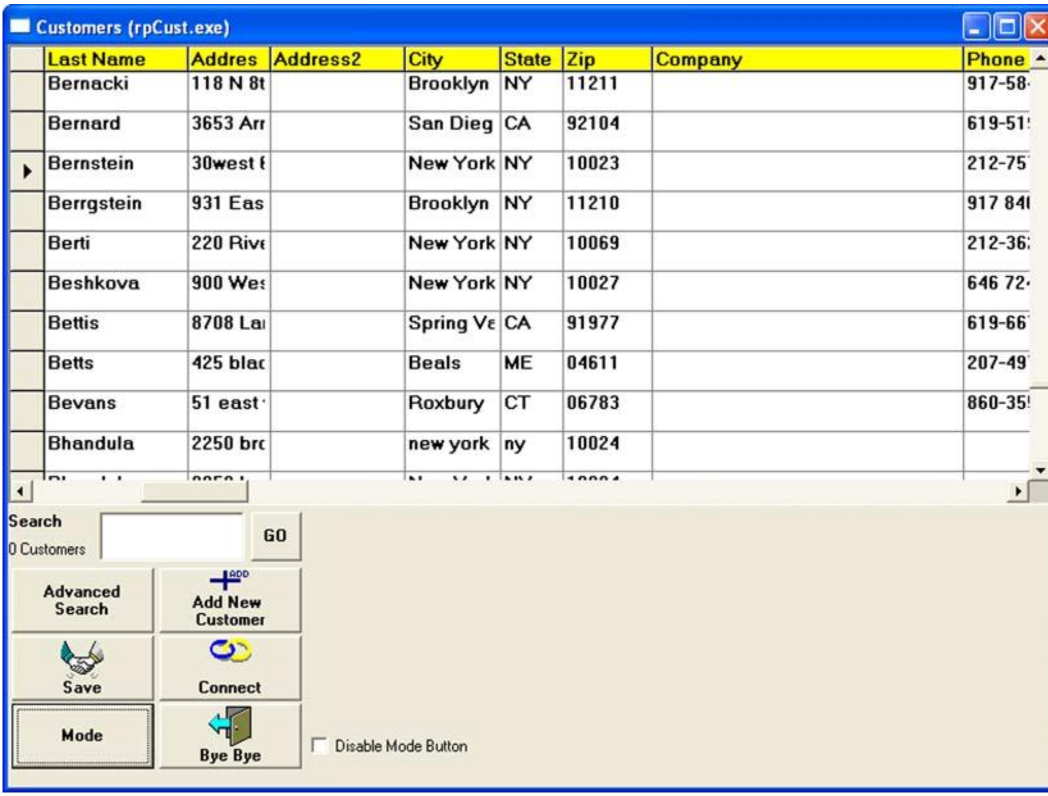
Other Settings:

This area contains miscellanous print settings for the gift certificate.



Top Margin: The distance from the top of the paper to the start of the printable area of the gift certificate.
Left Margin: The distance from the left edge of the paper to the printable area of the gift certificate.
Height: Defines the vertical length of the printable medium.
Width: Defines the horizontal length of the printable medium.
Portrait: Sets the printer to portrait orientation. (More tall than wide)
Landscape: Sets the printer to landscape orientation. (More wide than tall).
Save: Saves the settings in this section to the database.

4 Customer Management

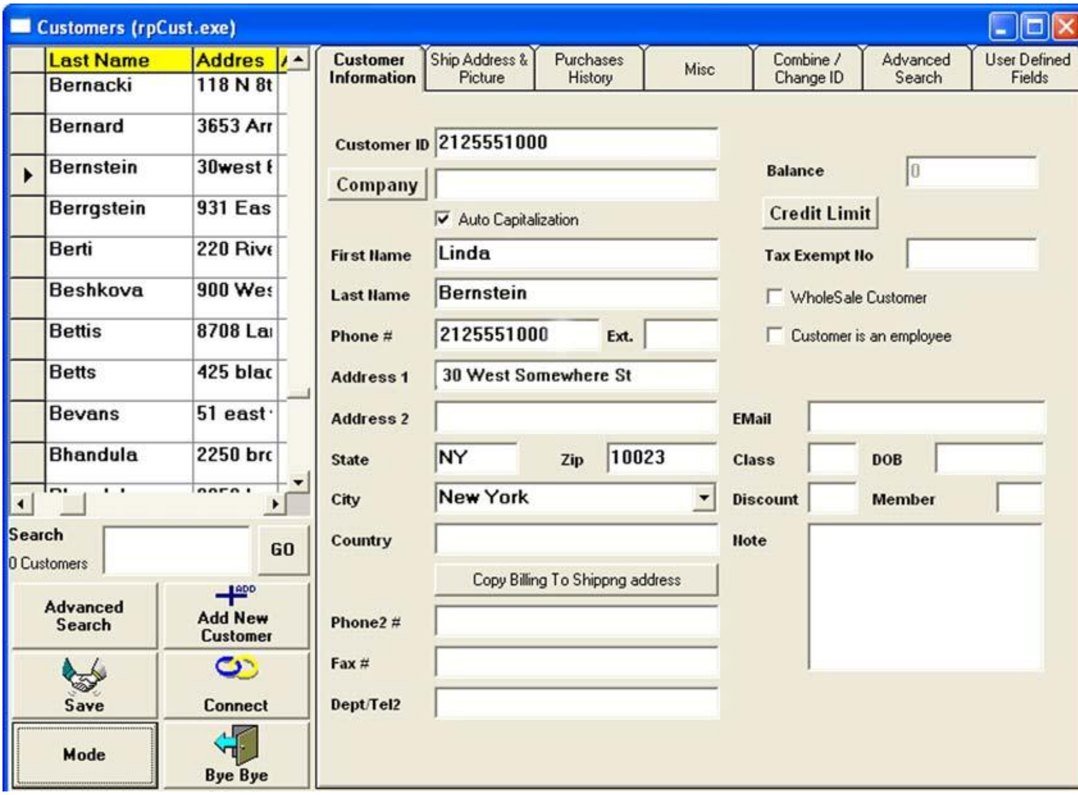


Customer management is an integral part of store management, the customers module of VRP provides for the tracking of customer data. In addition to providing a means to assemble a mailing list of your customers, the customers module allows for the analysis of customer spending, tracking of store credits, and orders.

The initial customers screen (shown above) displays customer records in the order they were entered into the system. To find a particular customer, enter all or part of their customer id, first name, last name, telephone number, or zip code into the **search** field and click on the **search** button (or Enter Key).

In the case of partial names or multiple matches - any customer record that matches the entered search string is displayed in the upper grid. Clicking on a displayed customer shifts the mode of the customers module to details mode.

Split Screen Mode



The details mode of the customers module contains the customers specific information organized into several tabs. When a customer is clicked on in the displayed list, the customer module shifts to this display mode. To hide the details tabs, click on the **Mode** button in the lower left corner of the screen.

Control Buttons

Advanced Search: Opens the split-screen mode to the advanced search tab.
Add New Customer: Begins creation of a new customer record. When in create mode, this button changes function to “Cancel Adding.”
Save: Saves changes to data made on the current customer - or saves a new customer when in add new customer mode.
Connect: Attaches the currently selected customer to a Point of Sale Transaction. When the customers screen is opened from the main VRP screen (and not the point of sale screen) the Connect button is equivalent to “Bye Bye.”
Mode: Toggles between open (full view) and split (detail view) modes.
Bye Bye: Closes the customer’s module. From the Point of Sale screen, this does **not** connect a customer to a sale.

Customer Information

The customer information tab contains the primary information for the customer. This includes the CustomerID, name, phone number, address, email, and membership & internal credit details. With the exception of the CustomerID, any information on this screen can be edited by the user.

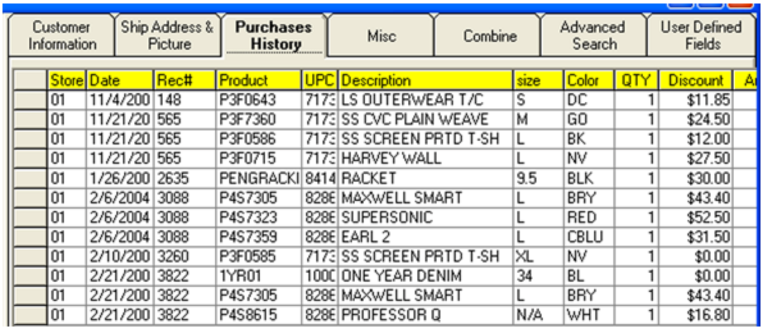
To save changes made to the customer information, click the SAVE button in the lower left.

If the customer has data in the User Defined customer fields, a blue “View User Defined Fields” button is visible in the lower right area of the screen. When viewing a customer that does not have user-defined fields that contain data, this button is not visible.

Ship Address & Picture

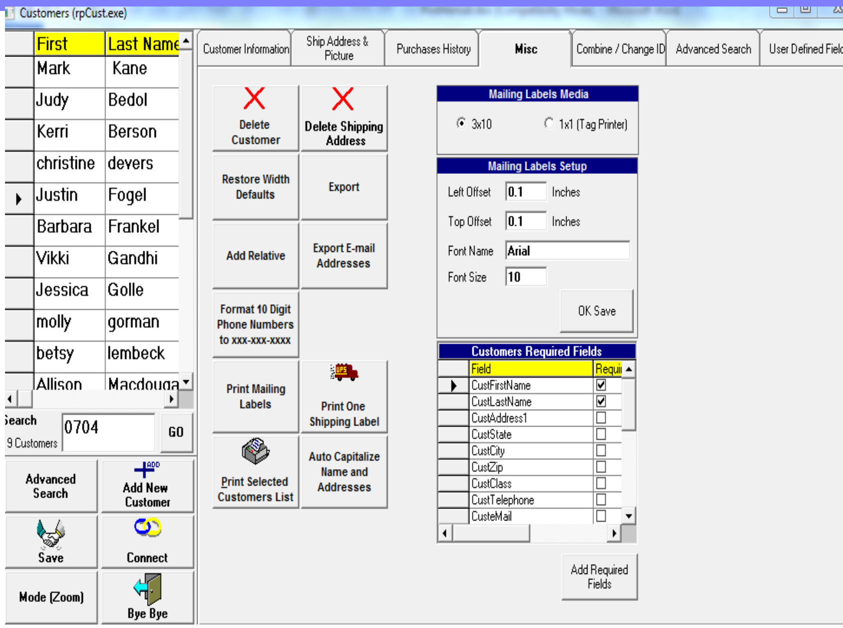
This tab contains the shipping address, and if present - the customer's photo. The "Print Customer Card" prints a membership card for the selected customer. The membership card can be printed as a standard (Credit card sized) card with photo, or a mini card (2 inch by 1 inch) without picture.

Purchases History



Store	Date	Rec#	Product	UPC	Description	size	Color	QTY	Discount	A
01	11/4/200	148	P3F0643	7173	LS OUTERWEAR T/C	S	DC	1	$11.85	
01	11/21/20	565	P3F7360	7173	SS CVC PLAIN WEAVE	M	GO	1	$24.50	
01	11/21/20	565	P3F0586	7173	SS SCREEN PRTD T-SH	L	BK	1	$12.00	
01	11/21/20	565	P3F0715	7173	HARVEY WALL	L	NV	1	$27.50	
01	1/26/200	2635	PENGRACKI	8414	RACKET	9.5	BLK	1	$30.00	
01	2/6/2004	3088	P4S7305	828E	MAXWELL SMART	L	BRY	1	$43.40	
01	2/6/2004	3088	P4S7323	828E	SUPERSONIC	L	RED	1	$52.50	
01	2/6/2004	3088	P4S7359	828E	EARL 2	L	CBLU	1	$31.50	
01	2/10/200	3260	P3F0585	7173	SS SCREEN PRTD T-SH	XL	NV	1	$0.00	
01	2/21/200	3822	1YR01	1000	ONE YEAR DENIM	34	BL	1	$0.00	
01	2/21/200	3822	P4S7305	828E	MAXWELL SMART	L	BRY	1	$43.40	
01	2/21/200	3822	P4S8615	828E	PROFESSOR Q	N/A	WHT	1	$16.80	

The purchases history tab displays recent items purchased by the selected customer. Transactions are displayed with store, date, receipt number, as well as information about the items and discounts. This information can be printed by clicking on the **print** button at the bottom of the screen.



Misc Tab

The misc (miscellaneous) tab contains several function buttons for customer management.

Delete Customer: Deletes the currently selected customer.

Delete Shipping Address: Clears the shipping address

Export: Exports the currently selected list of customers (by search criteria) to a comma-delimited file.

Add Relative: Adds a relative of the currently selected customer. (Husband, Wife, Child, etc.) "Related" customers are searchable by putting a customerid in the "company" search field.

Format 10 Digit: Format the phone number inputted into proper format.

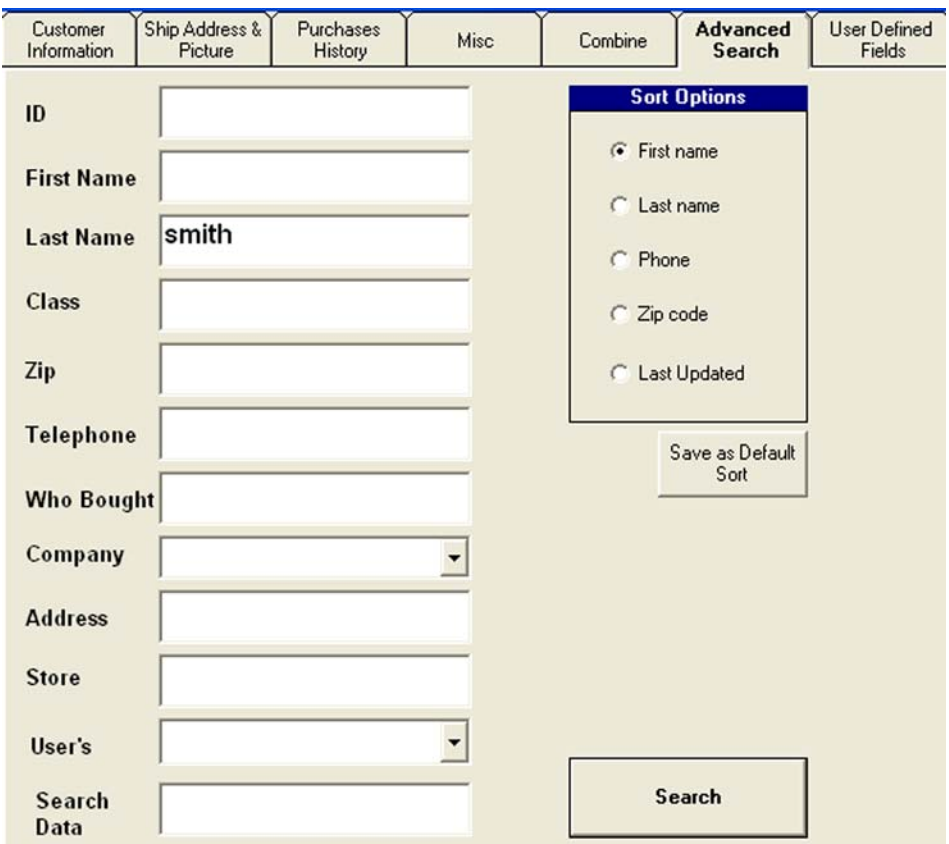
Print Mailing Labels: Prints mailing labels for the current list of customers (by search criteria). Mailing label settings are adjusted from this tab as well.

3 x 10: Formats mailing labels for a laser printer using label sheets - Three labels across by 10 down, on an 8x10 inch sheet.

1 x 1: Formats mailing labels for printing on a tag printer.
Print One Shipping Label: Prints a single shipping label for the current customer (for shipping merchandise).
Print Selected Customer List: Prints a list (report format) of the currently listed customers (based on search criteria.)
Customers Required Fields: Customer information fields that are checked on this area of the screen are required when creating new customer records. As shown in the example above, a customer with a blank “First name” or “last name” cannot be saved until there is data in those fields.

Combine Tab

.



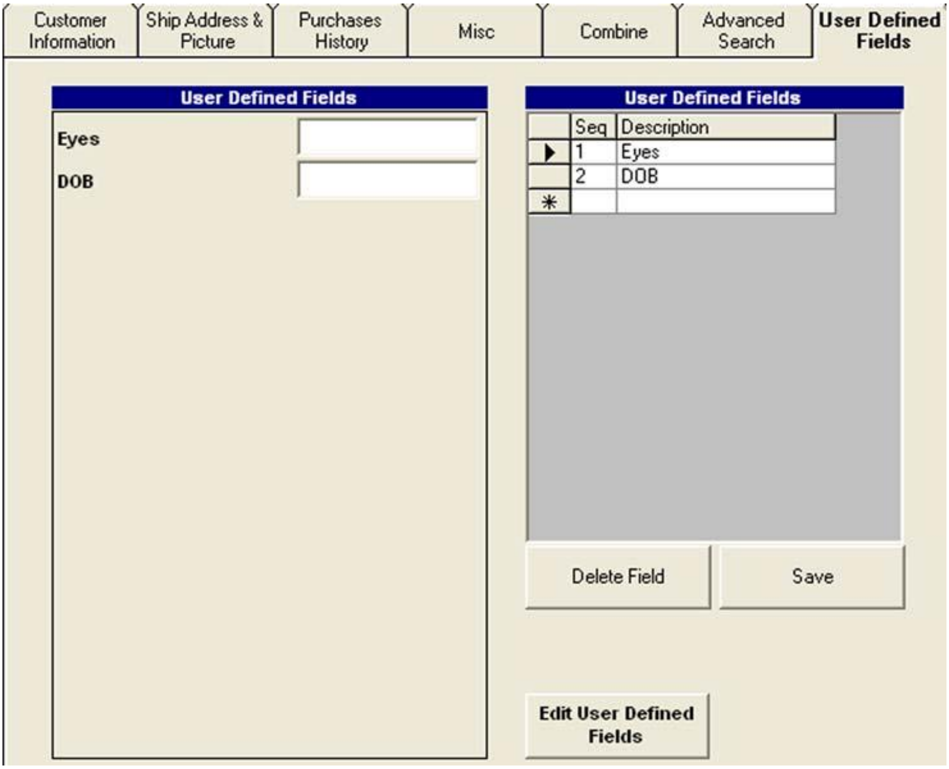
Advanced Search

The advanced search tab contains various search fields that can be used to conduct more specific searches of customers than is available with the quick search field. The advanced search is used mostly for building a "currently selected list" of customers for purposes of printing mailing labels, reports, or exported data.

Sort Order: The sort order determines what field of customer data is used for the sorting of the records.

Save as Default Sort: Saves the selected sort order. The next time the customer screen is opened, the initial display of customers will show the first 500 records, arranged by the sort order that was saved with this key.

User Defined Fields Tab



This tab facilitates the management of user-defined data fields for the customer database. These fields can be added based on the specific needs of your business to track other information about a customer that is not built into the customers module by default.

When displayed, the field definitions are hidden by default. The "Edit User Defined Fields" button reveals the field definition when clicked.

The use of these user defined fields is a two-step process. The first step is to create the field definition, and the second is to populate that field with data for the customer. The sub-window on the right side of the screen (User Defined Fields) displays all currently defined user fields for the customers. Creating a new user defined field is done by clicking on the bottom-most empty line (with the * mark) and entering a sequence number (Seq). The Seq number must be a unique value between 1 and 15 (no two fields can have the same Seq number) and numeric (no letters). After entering the Seq number, enter a description of the user field under the 'description' column.

In the example above, two user defined fields exist "Eyes" (for eye color), and DOB (date of birth). Creating these fields allows for two additional pieces of information to be tracked for each customer - however adding these field definitions does NOT add data to each customer, only a place to put that data.

The left side of this tab shows the currently existing user-defined fields as well as the cur- rently selected customer's data for those fields. Entering data into the user fields entails typing that data into the field to the right of the description (on the left side of the window) and pressing the **save** button on the customer's screen.

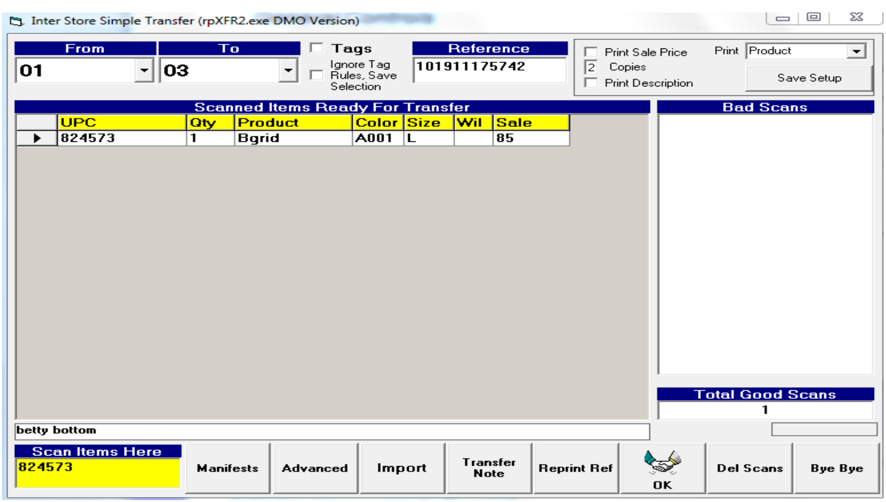
5 Transfers

The transfer module allows you to quickly and easily exchange inventory between multiple stores. There are three primary ways to select items to be transferred; manual entry (including scanning at the register), data collector scanning, and importing from a text file created by a PDC.

To begin setting up a transfer, select a source and destination store in the from/to area. Once a destination store is selected, a list of inventory available for transfer from the source store will be displayed in the center of the window.

Sample Inventory Display:

General Controls



Each transfer transaction requires a reference number. The reference number can be entered manually, or auto-created by the system. Having the system auto-create in VRP mode saves time and ensures that the same reference number is never re-used.

Controls:

From/To: Select the stores you wish to transfer from and to.
Del Scans: Prompts you to delete all scans, delete store scans, or a selected line.
Manifests: Allows you to see a detailed report about a transfer. It's received and intended amount.
Advances: Prompts a different set of controls for transfers.
Import: Import a set of items to be transferred.
Transfer Note: Add a note to the transfer.
Ok: Completes the transfer and saves all information.

Bye-Bye – Closes the transfer module.

Manual Entry

Manual entry of items for transfer includes three sub-modes of data entry. Typing in UPCs in the appropriate field, scanning UPCs into the appropriate field with a scanner at the PC, and selecting the items for transfer from the displayed list.

Search Fields:

The search fields below the inventory list allow the narrowing of the displayed list to more easily locate specific items. Items can be searched by ProductID, UPC, Description Text, and Group text.

Entering Products Manually:

Enter the UPC in the field, or place the cursor in the field and scan an item. To change the quantity of an item, scan or enter it multiple times – or highlight that UPC in the "Good Scans" menu in the top right, and enter the quantity of items to be transferred in the Quantity field immediately to the right of the "Scan Items Below" field.

The quantity field overwrites the previous quantity, thus to change the shown quantity from 2 to 12, you would enter 12, not 10. Continue adding items until all necessary items are present in the good scans list. Define the reference number (auto-create is recommended) and select the finalize button.

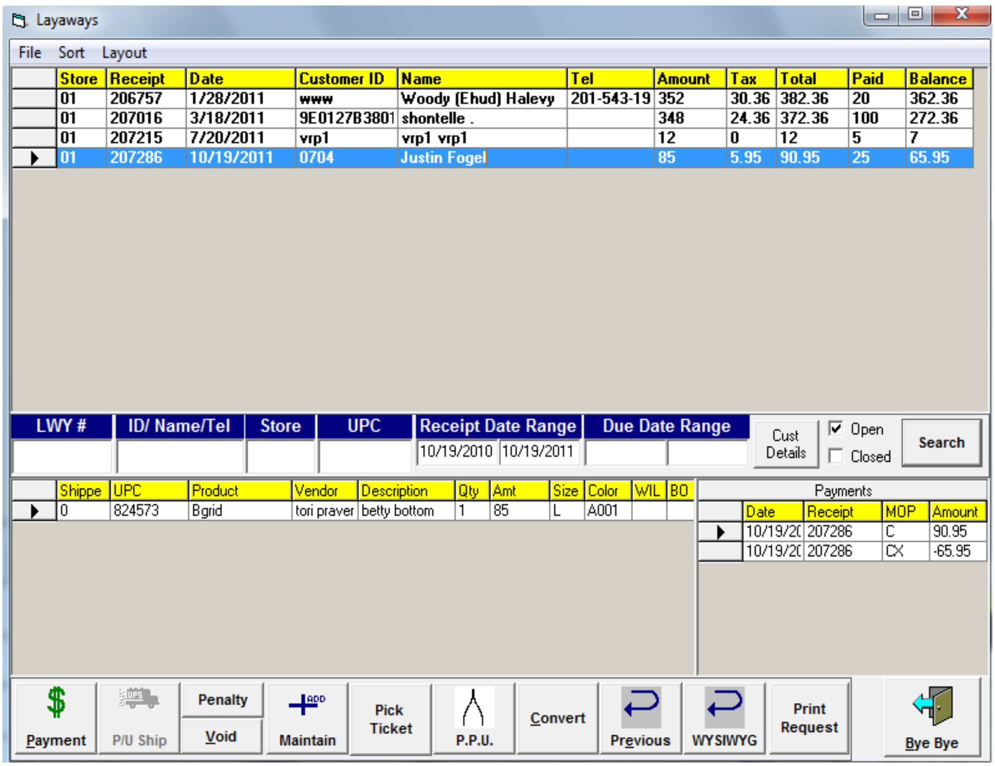
PDC Transfers

A portable data collector can be used to pre-scan a quantity of items that are to be transferred, enabling some of the work to be done free of the leash of a keyboard-scanner located at the point of sale (or back office) computer.

Finalizing

Once all items to be transferred are listed in the good-scans area, verify the from/to store, send mode (Send/Receive, or send only), and reference number. When all information is correct, select finalize to complete the transfer process.

6 Layaways



Layaways occur when a customer makes a partial payment on an item or group of items, and those items are reserved for the customer at the store until the full balance is satisfied. The layaway screen (shown above) allows you to view current and past layaways, add or remove items to the lay-away, make payments, and print reports of layaway status.

The top grid displays information about layaways in the system based on the selection of open / closed / all - as well as any criteria entered in the search fields. Entering a layaway number, customer ID, name, or telephone number, store id - or item UPC in any of the search causes only layaways that match the entered text to display.

The bottom area of the screen shows the individual items attached to each layaway. The contents of a layaway can be altered by the use of the **maintain** button. This feature re-opens the layaway at the point of sale screen as though it were still a transaction in progress. From here the following layaway maintenance functions can be performed:

Add Items: To add an item to the layaway, scan it (just like it was being sold normally) or use the LOOK button to locate the item and connect it.

Remove Item: To remove an item, click on it in the upper part of the point of sale screen and click on the "Rem Item" button.

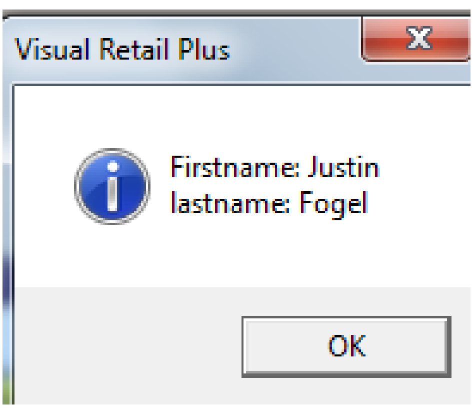
Edit Item: The quantity, discount, price, and tax for each item can be edited as though it were part of a normal transaction.

Saving Changes

When all necessary changes have been made to the layaway, the "**Done Making Changes**" button saves the layway back into the system.

Viewing Activity

Within the layaway screen, the bottom right section displays all editing activity that has occurred on the selected layaway. Adding or removing items, changing price / discount or tax information is recorded in this log.



The customer details displays information about the customer that has placed the layaway that is currently selected from the list of layaways.

Payments made to that layaway are itemized by receipt number in the lower part of this area - including the date, method of payment, and amount paid.

Control Buttons

The layaway screen control buttons have the following functions:

Payment: Adds a layaway payment to the POS screen current transaction. When you return to the POS screen, select the method of payment and enter the amount the customer wishes to pay towards the layaway. If the amount equals the remaining balance, the layaway will automatically close. By default, the layaway payment is entered at the full outstanding balance of the layaway. Items in the layaway can be selectively highlighted (see select value above) before clicking on the payment button. When the payment button is clicked with items highlighted, the amount of the layaway payment is set equal to the combined sale price of the selected items.

Activity History: Displays a list of all changes made via the Maintain function.

Statement: This button sends a current statement of the layaway to the receipt printer.

Report: Prints a layaway report.

P/U Ship: For customer orders, this feature allows items to be marked as picked up or shipped when they leave the store's inventory.

Penalty: Adds a penalty amount to the layaway transaction. This is most often used when layaway policy dictates a payment is required on a specific schedule and late or missed payments incur a maintenance charge.

Bye Bye: Exits the layaway screen.

Maintain: Reopens the layaway in the point of sale screen where items can be added, removed, or edited. The program returns to the point of sale screen with the items on the layaway shown as part of a current transaction. Make any desired changes - including adding items, removing items, changing discounts or quantities. Clicking the **Done Making Changes** button saves the layaway back to the layaway screen.

Void: Voids/cancels the layaway.

Partial Pick Up: Marks some of the items in a layaway/order as picked up without indicating the entire order/layaway has been picked up by the customer.

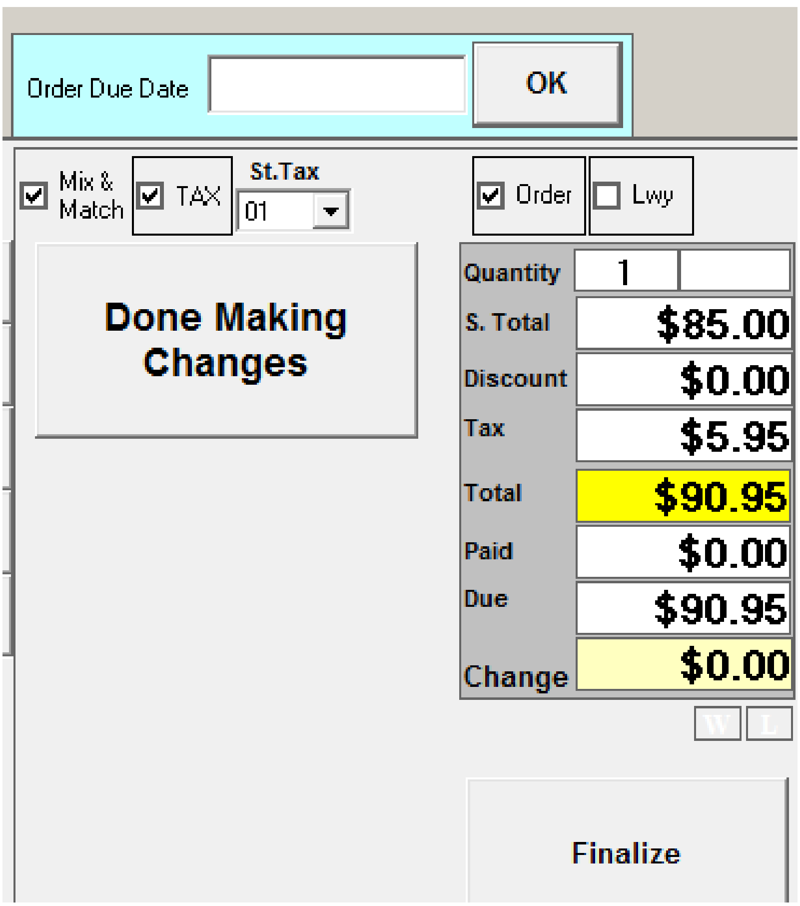
Convert: Converts the layaway to a store credit. This has the effect of creating a store credit equal in dollar value to the total amount of money collected on the selected layaway.

Previous: Opens the currently selected layaway's original receipt in the previous screen.

7 *Customer Orders*

There are several situations where the use of Customer Orders is appropriate. These include a product being out of stock, a sales room that sells products that are shipped from a separate location, or a business that does not maintain stock - and orders each item as it is purchased.

In order to use customer orders they must be enabled in the store setup. For more information about the setup module, see “Setup” on page 65



Starting a customer order is very similar to processing a normal sale. What changes a sale into an order is selecting the order checkbox located above the method of payment grid.

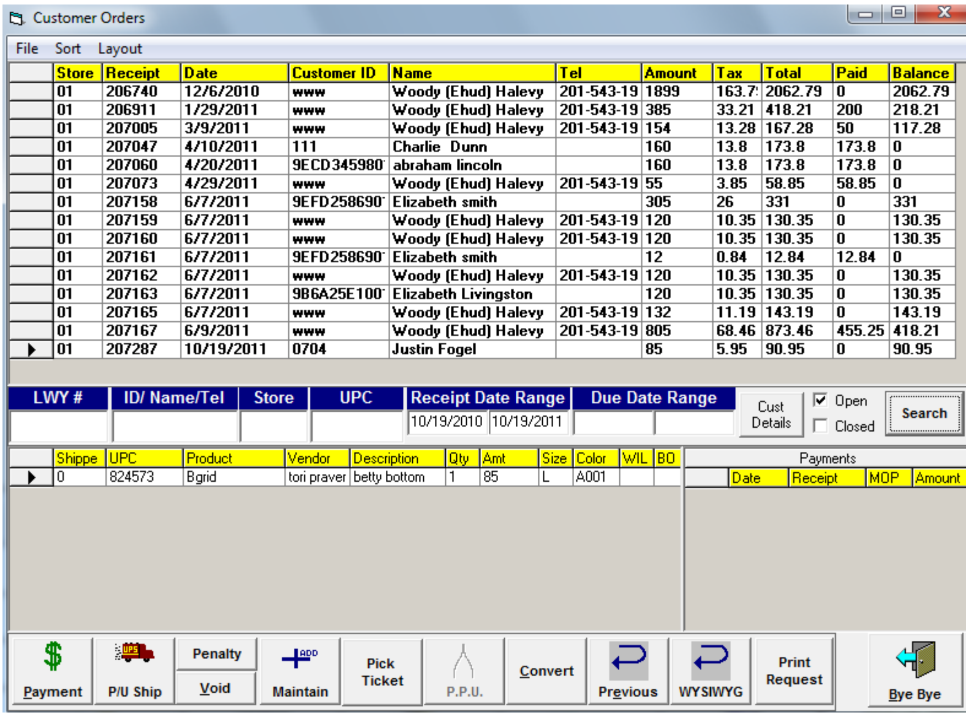
When a checkmark is placed in the box (circled) the sale is recorded in the system as a customer order.

Ringing up a customer order is (with the exception of the order checkbox) functionally identical to a normal sale from the perspective of the Point of Sale screen. When creating a customer order sale a customer **must** be assigned to the order. Attempting to finalize a customer order sale without assigning a customer results in the system prompting for the selection of a customer. The sale will not finalize without a customer being assigned. When the sale is finalized, the system prompts to determine if it is necessary to print a pick ticket or additional receipt copies. Pick tickets are used when items are in stock, but at a different location. In most cases the customer at the store takes the pick ticket to the warehouse location to claim their merchandise.

Payment

A customer order can be initiated with a partial or full payment - or none at all if so desired. A customer order record is generated when the sale is finalized. As with layaways, it is possible to record a series of payments over time if needed. When the outstanding balance of the order has been satisfied - the order will remain open until the items within it are marked as having been picked up.

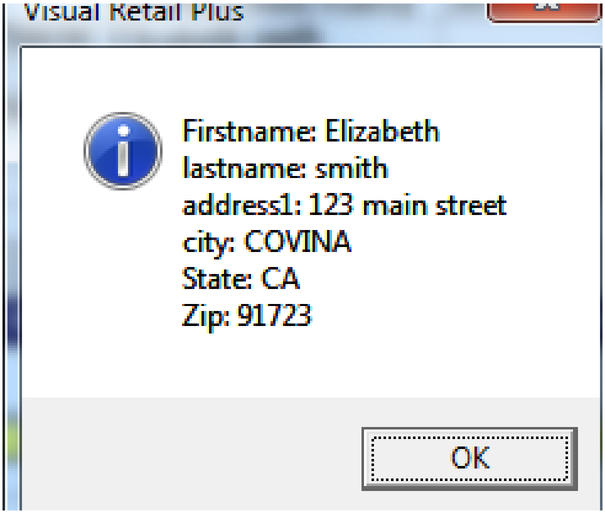
Customer Order Screen



The customer orders screen is used for the management of customer orders. Tasks including accepting partial or full payments, reporting, registering pick ups, and closing orders are performed from this screen. Accessing this screen is accomplished from the **Orders** button from the POS screen.

The upper area of the screen shows a list of outstanding (if the "open" option is selected in the center of the screen) customer orders that fit entered search criteria (order number, customer name, id, or telephone, store number, or a particular UPC). Select the "Closed" radio button to show closed orders - or the "All" button to display all orders regardless of status.

The bottom area of the screen displays the individual item(s) that are attached to the order. Each item is listed with UPC, product name, quantity, price, size, and color.



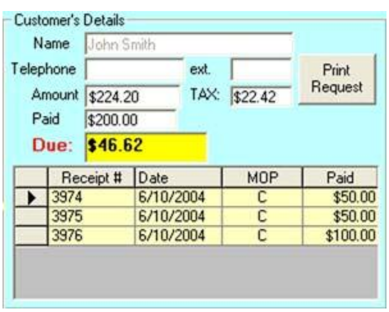
The bottom right area of the screen shows the payment history for the currently selected order. Dispalyed here is the total amount of the order, the amount thus far paid against the order (paid) and the amount that is still outstanding (due).

The lower part of this section shows the receipt numbers, dates, payment methods, and amounts for payments that were made against the order.

The customer's information can be accessed via the cust details button.

Print Request: This button prints a stockroom request ticket. This is implemented by having a networked printer installed in the warehouse or stock room, and sending this print request to that printer. A ticket showing the layaway number and register number prints - requesting a stock clerk collect the items belonging to that layaway and bring them to the indicated register.

This example shows the same order after multiple payments have been made against it.



Order Screen Controls

Payment: Pressing the payment button switches back to the POS screen with an order payment item attached to a sale transaction. This item must be the only item present for that transaction, and money collected on this sale is applied to the outstanding balance of the customer order. This transaction's receipt number appears in the payments area of the customer orders screen when the correct order is selected for display.

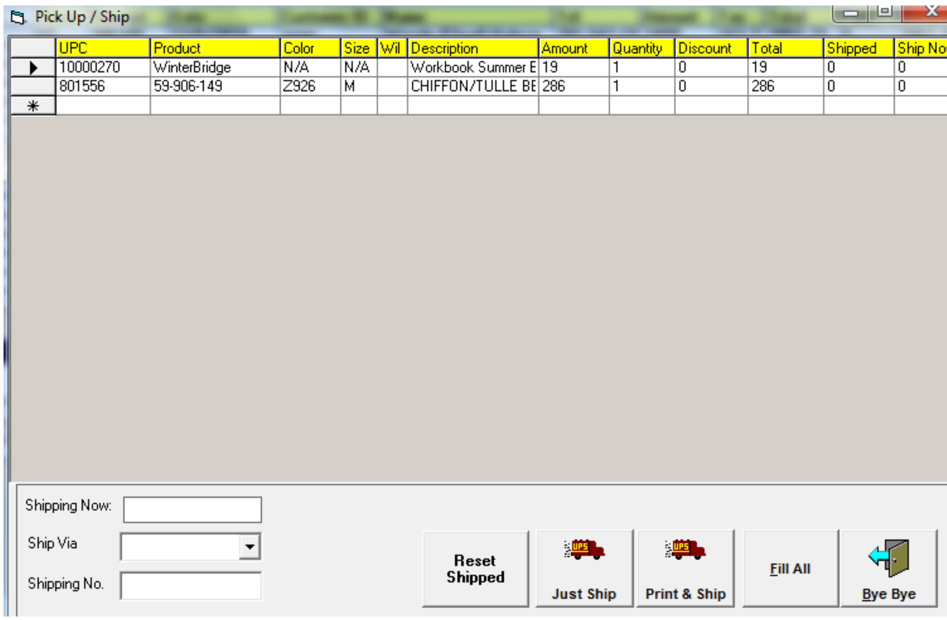
Activity History: Displays a list of any changes made to the order following its creation by means of the "maintain" feature.

Maintain: Allows for changes to be made to the order, see "maintaining orders" below.

Statement: Prints a statement receipt (current status) to the system's default receipt printer.

Report: Prints a report of currently open customer orders to the defined reports printer.

PU Ship: Pick up shipment. Opens the PU ship window:



Enter the quantity of each item to be shipped. The **Fill All** button fills in all quantities of all items. **Just Ship** records the shipment without printing a shipping receipt. **Print & Ship** prints a shipping receipt and marks the items as picked up. Select the Ship Via method (FedEx, Ups, etc), and enter a shipping number (tracking number) if appropriate.

Penalty: Applies a penalty amount to an order.

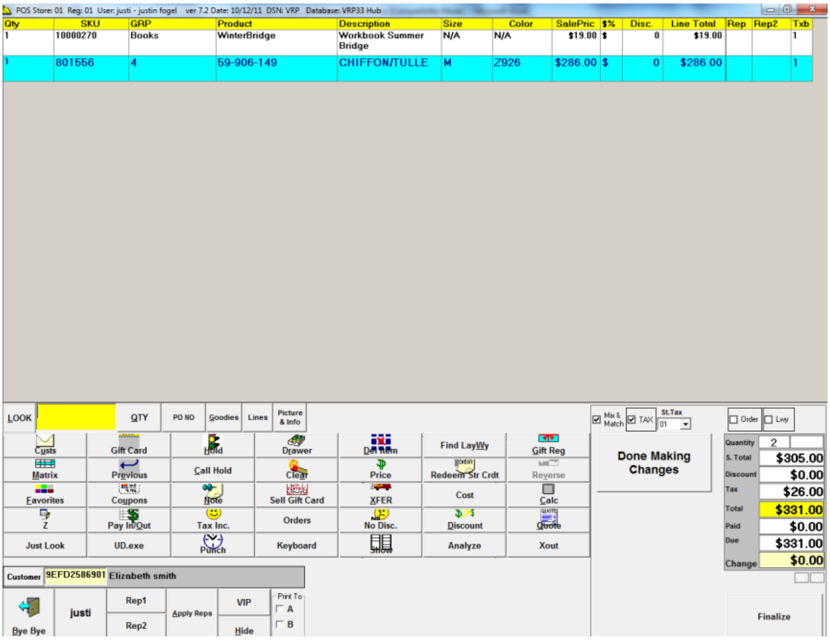
Void: Voids the customer order.

Convert: Removes the order, and converts any payments made against that order into a store credit.

Previous: Opens the "previous receipt viewer" window to display a receipt onscreen for the current order.

Maintaining an Order

Sometimes it is necessary to change an existing order. The maintain button re-loads a selected customer order into the Point of Sale screen as if it were a transaction in progress. While in this mode, the order can be changed in much the same way as an ongoing sale. Items can be added or removed, tax rules can be reassigned, quantities can be adjusted, and discounts can be added, changed, or removed.

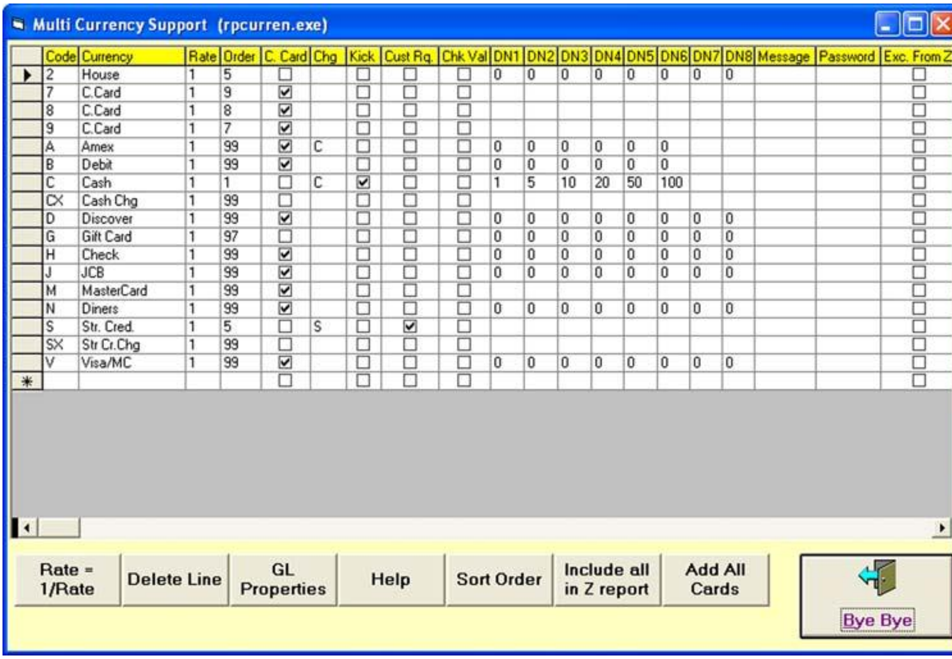


This screen shows an order in "maintain mode". It is loaded at the point of sale and appears to be an ongoing sale. Notice the "**Done Making Changes**" button has replaced the method of payment area. When editing an order (or layaway) this button allows you to save any changes made to the items in the order.

When you have completed making changes as desired to the items within the order, click the "Done Making Changes" button and the system saves the order and returns to the order screen.

8 *Currencies Table*

The currencies table is where the accepted methods of payment are defined for your store. The standard currency types are already listed in the table, however custom currency types can be added as desired. Currency types that have their "order" field set to 99 are marked as "not used", and do not display an option to use them on the POS screen.



Code	Currency	Rate	Order	C. Card	Chg	Kick	Cust Rq.	Chk Val	DN1	DN2	DN3	DN4	DN5	DN6	DN7	DN8	Message	Password	Exc. From Z
2	House	1	5	☐		☐	☐	☐	0	0	0	0	0	0	0	0			☐
7	C.Card	1	9	☑		☐	☐	☐											☐
8	C.Card	1	8	☑		☐	☐	☐											☐
9	C.Card	1	7	☑		☐	☐	☐											☐
A	Amex	1	99	☑	C	☐	☐	☐	0	0	0	0	0	0					☐
B	Debit	1	99	☑		☐	☐	☐	0	0	0	0	0	0					☐
C	Cash	1	1	☐	C	☑	☐	☐	1	5	10	20	50	100					☐
CX	Cash Chg	1	99	☐		☐	☐	☐											☐
D	Discover	1	99	☑		☐	☐	☐	0	0	0	0	0	0	0	0			☐
G	Gift Card	1	97	☐		☐	☐	☐	0	0	0	0	0	0	0	0			☐
H	Check	1	99	☑		☐	☐	☐	0	0	0	0	0	0	0	0			☐
J	JCB	1	99	☑		☐	☐	☐	0	0	0	0	0	0	0	0			☐
M	MasterCard	1	99	☑		☐	☐	☐											☐
N	Diners	1	99	☑		☐	☐	☐	0	0	0	0	0	0	0	0			☐
S	Str. Cred.	1	5	☐	S	☐	☑	☐											☐
SX	Str Cr.Chg	1	99	☐		☐	☐	☐											☐
V	Visa/MC	1	99	☑		☐	☐	☐	0	0	0	0	0	0	0	0			☐
✳				☐		☐	☐	☐											☐

Currency Attributes

Code: This number represents an internal system code used to refer to that currency type. These must be one character long, either letter or number, and cannot duplicate an existing code.
Currency: The name of the currency type.
Rate: Exchange rate compared to other currency types.
Order: This number defines the order in which that currency type is displayed on the point of sale screen. The lower the number, the higher up the item is displayed. An item with an order of 99 is not displayed.
C.Card: When enabled, this defines that currency type as a credit card that requires payment processing with the defined credit card payment system.
Chg: Defines how change is handled. Enter the code for the method of payment that can be given as change for that payment type. As shown above, the MOP Cash (C) has C entered for the Chg type. This means that change can be given, and it is given as cash. Also, above,

Amex has a C in the Chg field – that means that the system accepts Amex transactions higher in amount than the cost of the sale and allows cash change. Enter any MOP code in the Chg field and the system forces the change to be given as that type.

Kick: When enabled, transactions involving that method of payment cause the cash drawer to open.

Cust Rq: When enabled, the system requires that a customer be attached to the transaction (from the customer database) before that currency type is accepted.

Chk Val: When enabled, the system prompts for check validation when accepting that currency type.

DN1-8: The DN1 through DN8 fields program the denomination buttons when accepting payment. Enter the amounts that are displayed on the buttons for quick entry of dollar amounts. As shown above, the cash DN buttons are set to 1, 5, 10, 20, 50, and 100 – corresponding to the marked value of currency bills. These need not be set exactly to established currency amounts as they are for convenience purposes.

Message: Enter a message to be displayed when accepting that MOP. An example here would be a reminder to the cashier to verify the signature on a credit card.

Password: When not left blank, the system requires this password to accept that currency type. Use this when only managers are allowed to accept things like travelers checks or a specific type of credit card.

Exc From Z: When enabled, the indicated method of payment is not calculated as part of the Z out process. (Exclude from Z).

To enter a new currency type define the properties of that currency type, with the most importance paid to the code. The code must be unique to that currency type and is used by the system to refer to that method of payment. For example, when defining a house charge "currency" type – the code you select is what is entered in the SETUP screen, POS tab , Miscellaneous area. As shown here, the defined currency type is "House", with a code of "Q". In the Setup > POS > Miscellaneous area – you see the House Charge MOP is set to Q.

Controls:

Rate = 1/Rate: Sets the rate equal to 1/Xth the currently entered figure. If the rate is entered as 4, and this button is pressed – the rate is changed to .25.

Delete Line: Deletes the currently selected MOP line.

GL Properties: Defines general ledger properties.

Help: Displays some basic help information.

Sort Order: Re-sorts the displayed currencies by their "Order" setting.

Include all in Z Report: Removes the "Exclude from Z" setting from all MOPs.

A Glossary

AP	Accounts Payable
BO	Back Office
CO	Customer Order
CPU	Central Processing Unit - occasionally used to refer to the computer case.
DSN	Data Source Name
HUB	Hub computer responsible for the centralized management of store infor mation among multiple stores.
LAN	Local Area Network
MDB	File extension for Microsoft Access database files.
MOP	Method of Payment
MSRP	Manufacturer's Suggested Retail Price
ODBC	Short for Open DataBase Connectivity, a standard database access method developed by Microsoft Corporation.
O/H	On Hand
OTB	Open to Buy - Budgeting periods
PDC	Portable Data Collector
PLU	Price Lookup
PO	Purchase Order
POS	Point of Sale
PPU	Partial Pick Up
QTY	Quantity
RTV	Return to Vendor
SKU	Stock Keeping Unit (similar to UPC)
UPC	Universal Product Code
WEDGE	Keyboard Wedge - a device that is connected to the computer by means of the keyboard port. Typically connected between the keyboard and the CPU.
WYSIWYG	Pronounced (Wizee Wig), this term is an acronym meaning "what you see is what you get", originating from the first generation of word processing software that was able to display on the screen the way a document would look when printed.
XFER	Common abbreviation for transfer.