PURPOSE
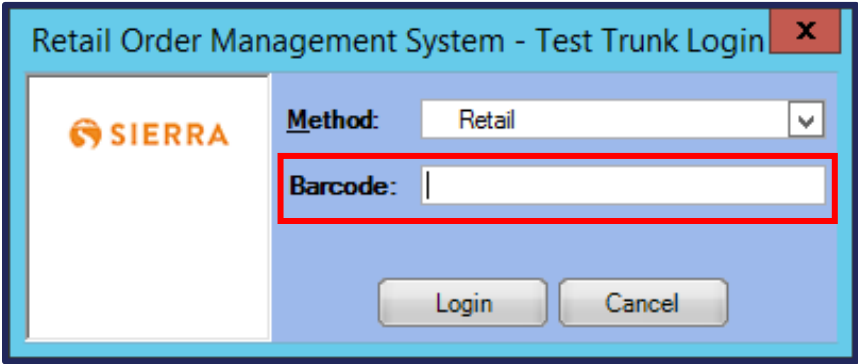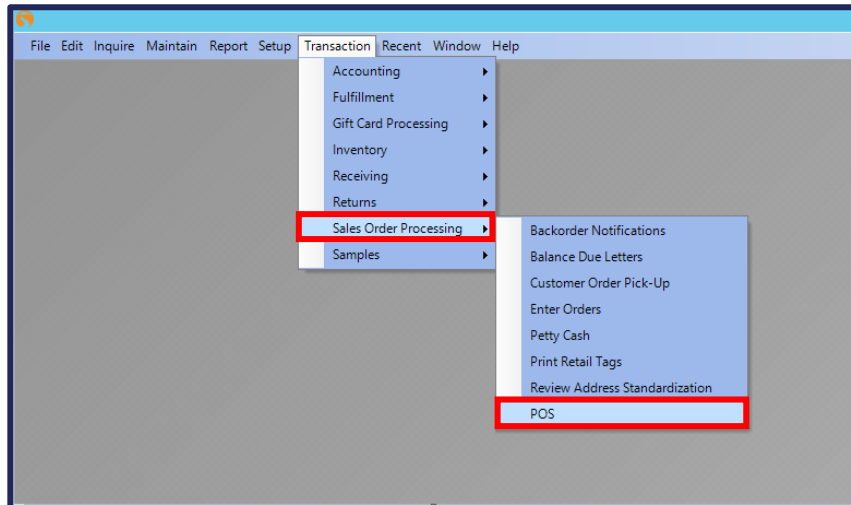
This SOP provides the necessary information and detailed instructions on processing transactions in OMS.

Accessing OMS

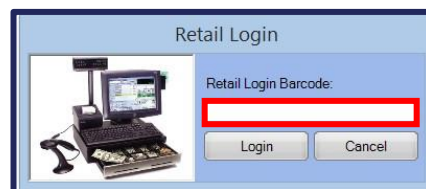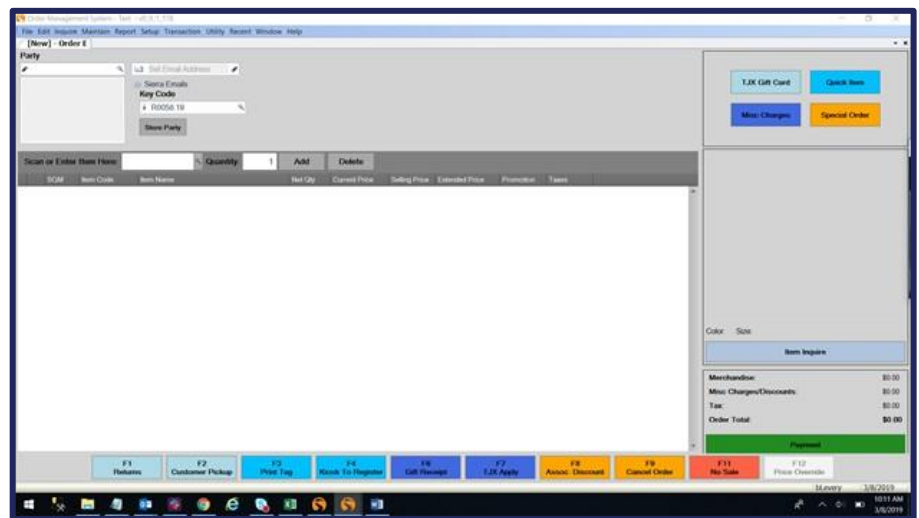| STEP	ACTION	EXAMPLE
1.	**Logging into OMS** a. When logging in to the Register, you will scan the bar code attached to the screen or receipt printer. b. Double-click on the Retail OMS Desktop connection. c. In the barcode field, enter your AIN to log in to OMS. **NOTE** When you are done using a register, make sure to close the OMS application. **Never restart any POS hardware** unless directed by TJX IT or Vendor Rep.	

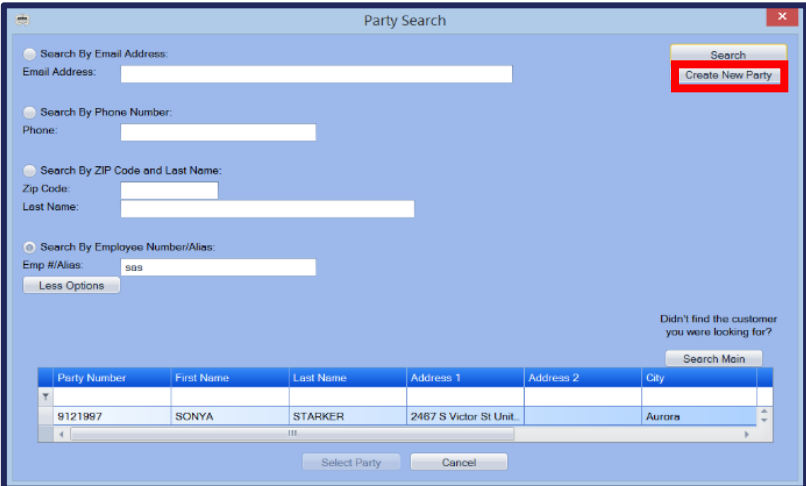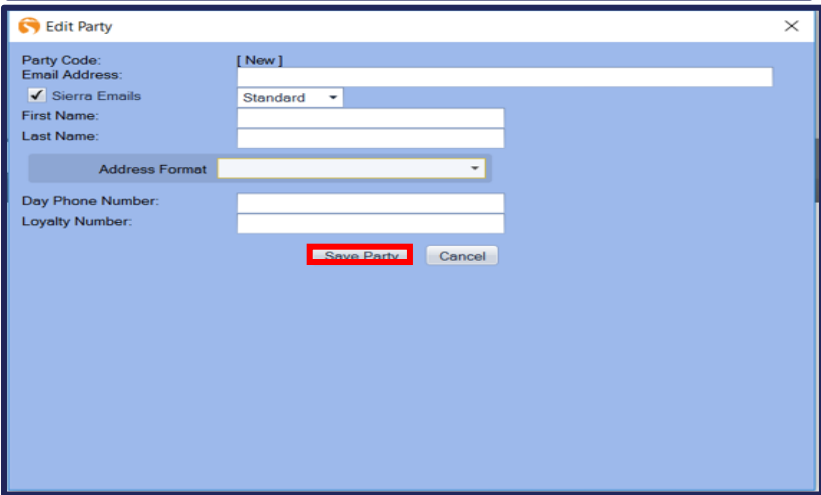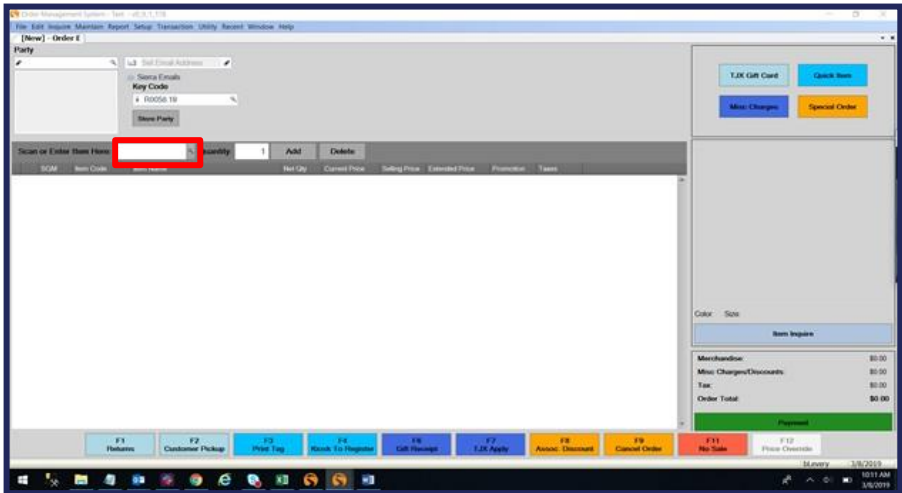| 2.	**Order Entry Screen** a. To check out a customer, access the Order Entry Screen within OMS. b. Order Entry can be accessed via Transaction, Sales Order Processing, POS	
3.	**Beginning a Sales Transaction** a. When prompted, enter <u>YOUR</u> AIN.	

SOP – OMS Transactions

Existing Customers

STEP	ACTION	EXAMPLE
1.	**Adding an Existing Party to A Transaction** a. If the customer is already established in our system, enter the entire email address or zip code and last name (Smith 80120) in the party field, then hit enter. b. The system will populate a list of matching accounts. c. To select the customer party, double-click on the correct name.	
2.	**Looking up an Existing Party** a. To refine the search, click the More Options button underneath "Email Address" and select additional criteria. b. This function can be used to update party info.	

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New Customers

STEP	ACTION	EXAMPLE
1.	**Create A New Party** a. If the customer is not already established in our system, click the magnifying glass in the party field to open more options. b. Then select "Create New Party" c. Enter Customer information. d. Update "Address Format" for the USA (if applicable) to reveal all options. e. Provide your Email Address, First and last Name, and Zip Code to give us several options for searching for future purchases. f. Get a mailing address and phone number for GREAT customer service!	

Sales Order Entry

STEP	ACTION	EXAMPLE
1.	**Scanning Items** a. Before scanning items, click the item code box b. You may now start scanning the customer's merchandise. Make sure every item you scan shows up and is the correct price. c. Make sure the picture matches the item that is scanned; items available in-store only will not have a picture. d. Check for security sensors on merchandise.	

Payments
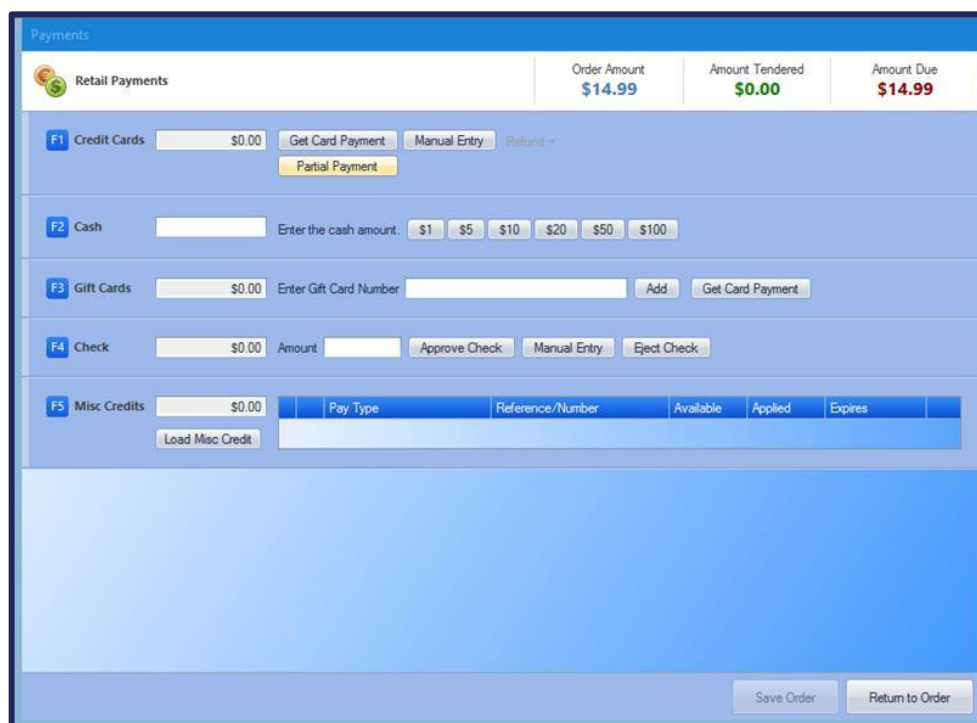
The customer can insert their card at any time after a party is established by using the VeriFone pinpad. The amount will change to the total due when you click "Payment".
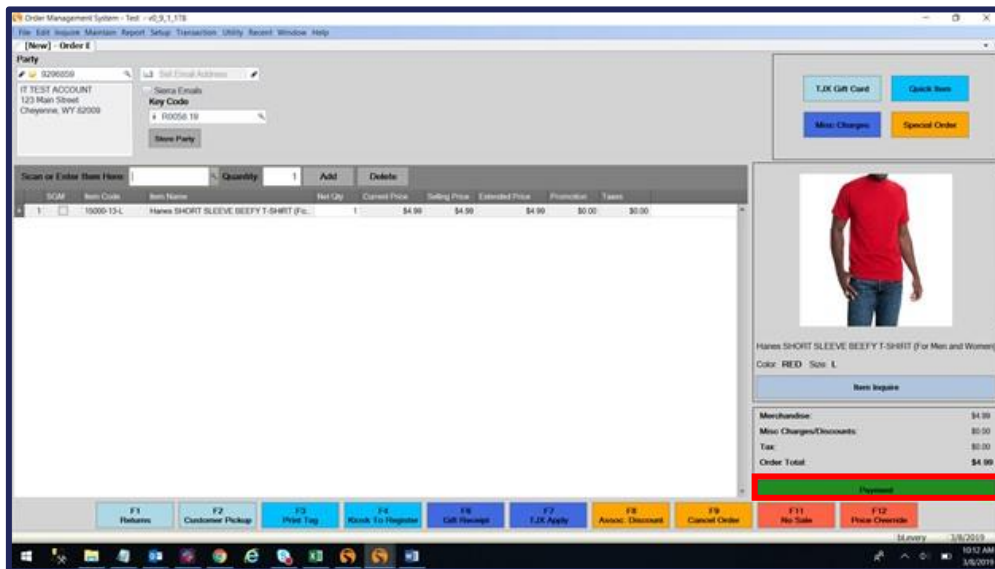
Tip:

- Accepted tenders are cash, check, gift cards/TJX Rewards Certificates
- If the method is a split tender, such as a gift card and credit card, put the gift card in first.

To open the payment screen, click "Payment" on the right side of Order Entry. You must do this at the end of **EVERY** transaction but only when everything has been rung up.

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SOP – OMS Transactions

SIERRA®

Customer Facing Verifone Pinpad Screens

Static screen customers see before transaction and party data is loaded.

Until an order is saved, the customer will see this screen.

We are ready to take the card payment! Google and Apple Pay are also accepted.

Until an order is saved, the customer will see this screen.

Until an order is saved, the customer will see this screen.

Credit Card Payments

- A customer can place their credit card in the chip reader as soon as a party is attached to their purchase. If the card has a chip, the system will reject the card if they try to slide. **ALWAYS TAKE THE CREDIT/DEBIT CARD LAST.**

- Once the payment screen has been brought up and the card is inserted, hit "F1" on the keyboard, or you may click "Get Card Payment."

- American Express cards cannot be tapped at the pin pad; they must be swiped or inserted.

- If a customer asks to split tender, the cashier must enter the amount they wish to pay before card is inserted. After clicking "Get Card Payment", the system may still display that the amount due is for the full amount of the transaction, this is normal and will only charge for the split amount entered.

- Debit cards, require the customer to type their PIN. Credit cards will ask for a signature.

Tip:

- If a customer wants to process their debit card as a "Credit", click the green arrow and leave the PIN blank.
- PayPal is accepted and processed like a regular credit/debit card. The customer must have a virtual/physical PayPal card to use.

Cash Payments

Hit "F2" on the keyboard and type in the amount of cash the customer is paying with.

Gift Card/TJX Rewards Certificate Payments

Hit "F3" on the keyboard, and then have the customer swipe their gift card on the Verifone. A screen will pop up to confirm the amount. Click "OK." A pop-up will ask you to verify the last five digits of the gift card.

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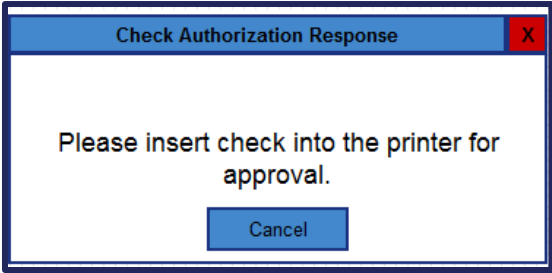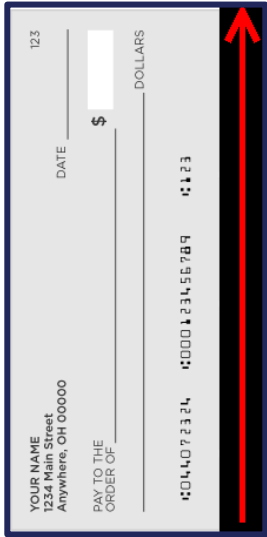
Check Payments

Hit "F4" on the keyboard and enter the Check Number located at the top right of the check. Hit TAB, then enter the amount of the check. See the next page for additional information needed for all check payments.

Tips:

- The system automatically defaults to entering in cash when clicking save. Hitting "F2" is only necessary if you switch away from it.
- To split a payment, just type the amounts into the fields and it automatically applies. To do cash then credit card: Type in the cash, then hit "F1" to charge the rest on the card.

Processing Checks

STEP	ACTION	EXAMPLE
1.	**Processing a Check in OMS** a. Click the "Approve Check" button, a pop-up will appear, insert check face up, with banking information on the right, into the printer. b. Printer will intake to read micro data from the check. IF the printer cannot read the micro data, the information must be input manually using the Manual Entry Screen. c. Response from Certegy will be either Approve or Decline.	

d. Approve- Printer will Endorse/Frank the back of the check with required information and Associate can complete transaction.

e. Decline- Check will be ejected from the printer and a decline message will prompt the Associate to ask for another form of payment.

f. If Certegy cannot be reached or is offline a popup will be generated instructing the Associate to call for authorization. All grayed fields are read only. **Associates** MUST call for authorization if the screen on the right is generated.

Check Authorization Manual Entry ☒

Please enter the check data found at the bottom of the check.

YOUR NAME
1234 Main Street
Anywhere, OH 00000   DATE _____

PAY TO THE
ORDER OF _____ $ _____

_____ DOLLARS

⑈044072324⑈ ⑆000123456789⑆ ⑈123

ROUTING **ACCOUNT** **CHECK**
NUMBER   NUMBER   NUMBER

Routing Number   [   ]
Account Number   [   ]
Check Number   [   ]
Check Amount   [   ]

[Submit]   [Cancel]

Check Voice Authorization ☒

Your store cannot connect to the check authorization service.
Please call 1-800-555-5555 for a Voice Authorization.
You will need the following information:

Store Account Number   [   ]
Store Number   [   ]
Routing Number   [   ]
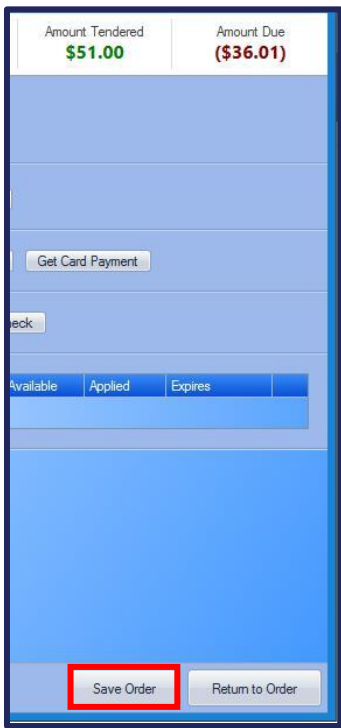Account Number   [   ]
Check Number   [   ]
Check Amount   [   ]

You will receive a Voice Authorization number. Please enter that number below.

Vioce Authorization #   [   ]

[Save]   [Cancel]

Receipts

STEP	ACTION	EXAMPLE
1.	**Credit / Debit Cards** a. After the customer has input their PIN or Signature, the payment screen will come back to the Associate. b. Click "Save Order" at the bottom of the screen. The customer will be prompted on the VeriFone if they would like a copy of their receipt e-mailed to them.	
2.	**Cash / Check / Gift Card / Misc. Credit** a. Click "Save Order" once the full amount has been accounted for. The customer will be prompted on the VeriFone if they would like a copy of their receipt e-mailed to them. b. Customer must confirm e-mail address if requesting an email receipt.	