

# SuiteCommerce InStore User Guide



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# SCIS User Guide Overview

This guide provides information to sales associates and sales managers about how to operate SuiteCommerce InStore (SCIS). This section also provides information about the user interface, entering transactions, and customer records. For administrator information, see the help topic [SuiteCommerce InStore Administrator's Overview](#).

SCIS is a web-based point-of-sale application. It provides a touch-based user interface specifically designed for tablets. Dedicated point-of-sale hardware is not required. SCIS supports common point-of-sale peripherals including: Credit card readers, printers, barcode scanners, and cash drawers.

**Important:** The SuiteCommerce InStore mobile app is always required when using SCIS on an iPad, or with the Windows Operating System on a tablet or computer. Using SCIS on a desktop or laptop computer with a web browser such as Safari, Chrome, or Firefox is not supported.

## Integration with NetSuite

SCIS is designed to integrate natively with NetSuite. The SuiteCommerce InStore SuiteApp is installed in your organization's NetSuite account. Sales associates use the secure SCIS POS application to access SCIS. All data used by SCIS is stored in and retrieved from NetSuite. This enables SCIS to leverage other NetSuite product areas, including Enterprise Resource Planning (ERP), Commerce web stores, and Customer Relationship management (CRM).

## Access to Customer Profiles

The Customer Profile, provides the sales associate with a complete view of a customer's purchase activity. The customer timeline shows purchases, returns, shipments, and dates of interactions with the call center. To access the Customer Profile and timeline, the sales associate clicks a customer's name.

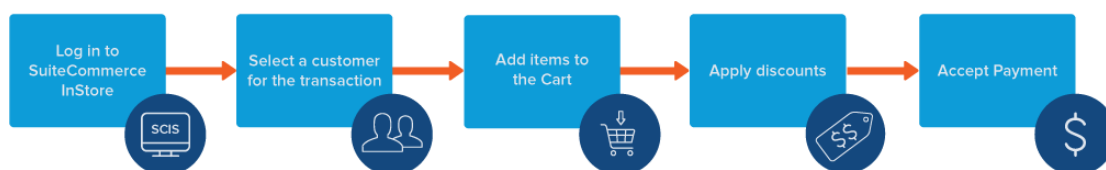
## Roles and Permissions

Each employee who will be using SCIS, must be granted one of the custom roles added to NetSuite when SuiteCommerce InStore is installed. If needed, an administrator can customize a role to comply with the business needs of the organization. To log in to SCIS, each user enters login credentials based on the role assigned.

The SuiteCommerce InStore SuiteApp installs a basic set of permissions for operations that are typical in retail transactions, such as void lines, and applying discounts. The employee using SCIS is required to have the necessary NetSuite permissions to perform these operations.

## SuiteCommerce InStore Workflow

The following list outlines the typical workflow for performing transactions. Links are provided to the corresponding sections of documentation.



### 1. Log In to SuiteCommerce InStore.

After entering your login credentials, depending on your system configuration, you may be required to enter an opening drawer transaction. From the User Menu, you can select a printer, and select a Sales Rep. If you have been assigned more than one role, you can select the role you want to use when you log in. For more information, see [SuiteCommerce InStore Login](#).

### 2. Select a customer for a transaction.

You can use the search bar in SCIS to find any existing customers. This includes customers who previously completed a purchase through SCIS, customers entered in the NetSuite system, or customers who completed a purchase from the online store. For more information, see [Adding Customers To Sales Transactions in SCIS](#). See also, [Working with Customer Profile Information](#).

### 3. Add items to the cart.

You can use the search bar or the QuickAdd bar to find items in SCIS. To add items to a transaction, you can use a barcode scanner, or click an item QuickAdd Key. For more information, see [Adding Items to a Sales Transaction in SCIS](#).

### 4. Apply discounts.

(Optional) You can apply a discount to a particular item, or apply the discount to the entire order. Alternatively, you can apply a promotion code to an order. For more information, see [Discounts and Markups in SCIS](#).

### 5. Accept payment.

SCIS supports all payment methods that have been configured by the system administrator. For more information, see [Accepting Payments for Purchases in SCIS](#).

Read the following topics to learn about other procedures and tasks that you may perform on a regular basis:

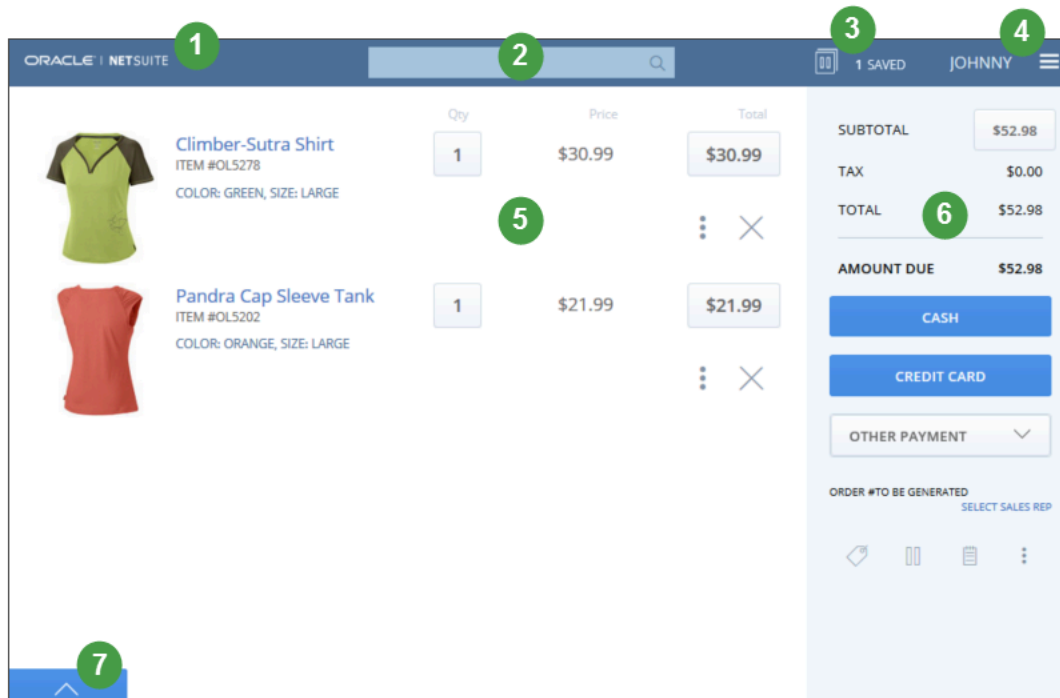
- [Working with Gift Cards in SCIS](#)
- [Processing Returns in SCIS](#)
- [Working with Credit Memos in SCIS](#)
- [SCIS Cash Drawer](#)

## SuiteCommerce InStore User Interface

- [Main Application Page](#)
- [Login and User Menu](#)
- [QuickAdd Bar](#)
- [The Cart](#)
- [Product Detail Page](#)
- [Swipe to Refresh](#)
- [Popup Windows for Log Out or Application Closure](#)

## Main Application Page

SCIS provides a touchscreen user interface. The following screenshot shows the user interface when performing a transaction.

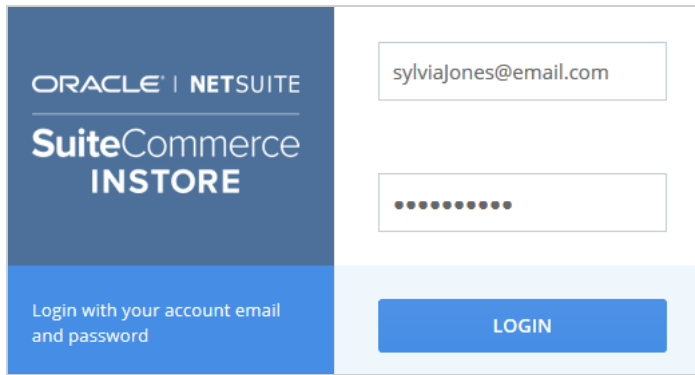


1. **Application Logo** – Appears differently, according to your installation of SCIS.
2. **Search Bar** – Enables you to search for customer profiles, items, and transactions. To use the search, enter the first few letters of a customer's first or last name, a product name, or the first numbers of a transaction ID.
3. **Saved Transaction menu** – Click to see a list of suspended transactions. For more information, see [Saving an Order](#).
4. **User Menu** – Click to view additional commands, such as Printer Setup and Drawer Operations. For more information, see [Login and User Menu](#).
5. **Cart** – Displays a list of items added to a transaction. For more information, see [The Cart](#).
6. **Transaction Summary** – Displays totals for the transaction, including subtotal, tax due, and amount due.
7. **QuickAdd tab** – Click to display the QuickAdd bar. For more information, see [QuickAdd Bar](#).

## Login and User Menu

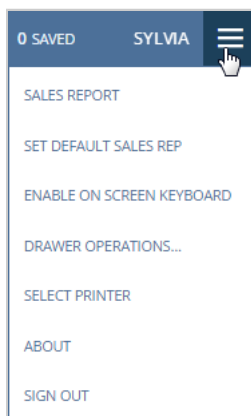
The first page you encounter in SCIS, is the Login page. Here you enter your email address and a password assigned to you by your manager or system administrator.





The login screen features a dark blue header with the Oracle | NetSuite logo and 'SuiteCommerce INSTORE' text. Below the header, on the left, is a blue box with the text 'Login with your account email and password'. On the right, there is a light blue box containing an email input field with 'sylviajones@email.com', a password input field with masked dots, and a blue 'LOGIN' button.

After you log in, click the User Menu to select your next task.



From the User Menu, you can do the following:

- View a report of your sales performance. For more information, see [Viewing a Sales Report in SCIS](#).
- Set the default sales representative for this session or for all sessions. For more information, see [Selecting a Sales Representative](#).
- Enable the on screen keyboard, so you can type on your tablet.
- Perform cash drawer operations such as, Opening Drawer and Closing Drawer. For more information, see [SCIS Cash Drawer](#).
- Select a printer for printing receipts. For more information, see [Selecting a Printer](#).
- View the current version of SuiteCommerce InStore that you are using.
- Sign out.

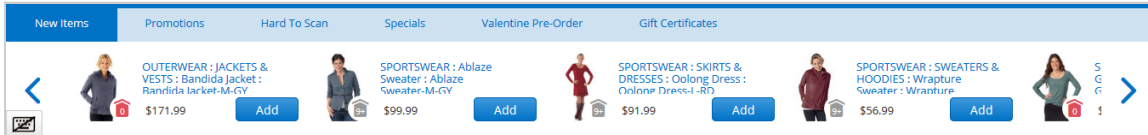
## QuickAdd Bar

You can use the QuickAdd bar to find items to add to an order. Your system administrator defines the tabs that organize item QuickAdd Keys into groups on the QuickAdd bar. By default, QuickAdd Keys are organized in the following groups on the QuickAdd bar:

- New Items
- Promotions

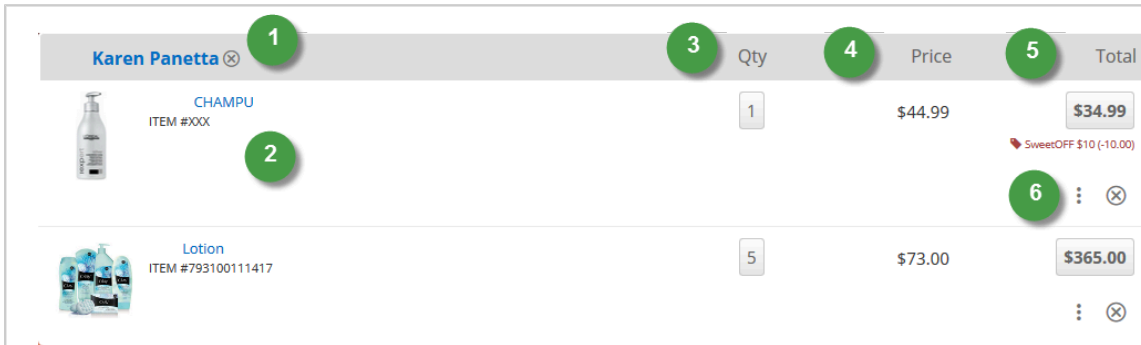
- Hard to Scan
- Special Offers
- Correlated Items

These groups appear as tabs in SCIS as shown in the following screenshot.



## The Cart

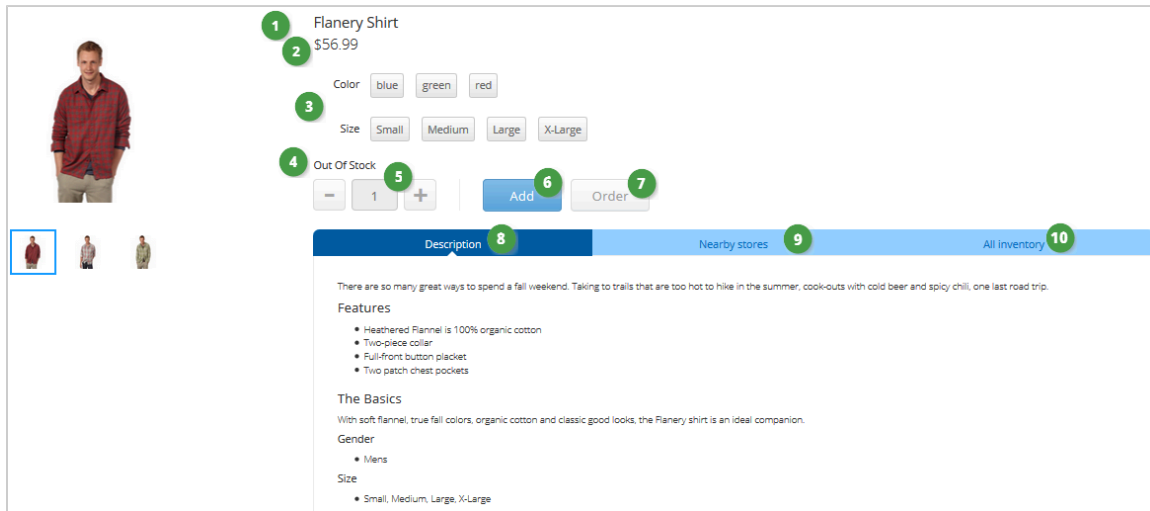
The following screenshot shows the cart when an item is selected. Click the item name to view the product detail page.



- Customer name** – Displays the customer associated with the current transaction. If no customer has been added to the transaction, the default customer name is shown.
- Item description** – Displays information about an item. Click the item name to drill down to the product detail page.
- Item quantity** – Displays the quantity of an item added to the cart. Click the item quantity to increase or decrease the number.
- Item price** – Displays the price of the item.
- Item total** – Displays the total due for a type of item. Click the amount to apply a discount.
- Item action menu** – Click to view a popup menu that displays additional actions you can perform on an item. For more information, see [SCIS Store Pickup and Orders for Delivery](#). See also, [Processing Returns in SCIS](#).

## Product Detail Page

On the product detail page you can view the detailed description of an item, add an item to the cart, place an order for delivery, and view or enter ratings and reviews. Select item options to view the quantity of inventory available for an item. In SCIS 2019.1 and later, the inventory count is displayed on the PDP for matrix items only after item options are selected.



1. **Product Name** – Typically appears at the top of the product detail page.
2. **Price** – Price as configured on the item record in NetSuite.
3. **Product matrix options** – Matrix options are based on item record configuration in NetSuite.
4. **Inventory status** – Shows the quantity on hand at the location of the sales associate who is logged in.
5. **Quantity to add to cart** – Click the plus and minus buttons to set the quantity that should be added to the cart.
6. **Add to cart button** – Click Add to put items in the shopping cart for cash and carry transactions.
7. **Order button** – Click Order to place an order for delivery to the customer's address.
8. **Description** – Includes a detailed description of the item.
9. **Nearby stores** – Shows a list of the local stores.
10. **All inventory** – Shows a list of the inventory count across different locations.

**Note:** You can add an item even if the inventory shows zero at your location. If an item is not on hand, you can advise the customer if shipping is available from another location.

## Swipe to Refresh

Sometimes a sales associate may need to refresh the SCIS application. **Refresh** describes the process of reloading or updating data displayed on the screen.

Use the refresh capability in SCIS if you encounter a problem with connectivity, an application error, or a role or permission problem. Refreshing the application enables you to continue working or start troubleshooting.

The following table describes the gestures you can use to refresh SCIS on various devices.

Operating System/Device	Refresh Gesture
iOS	Swipe from the left edge of the screen to expose the refresh menu.
Windows	Make a cross (x) gesture on the tablet screen with two fingers.

Operating System/Device	Refresh Gesture
Laptop or desktop computer	Make a cross (x) with the cursor.

After you make a refresh gesture, options for three levels of application refresh are displayed:

- **Refresh current page** – Reloads the page you are currently viewing.
- **Reload initial store page** – Reloads the store login page.
- **Restart application** – Initializes the application from topmost entry point, which is the login screen.

**Reload actions**  
Choose type of reload action.

Refresh current page

Reload initial store page

Restart application

Cancel

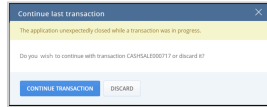
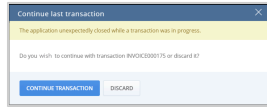
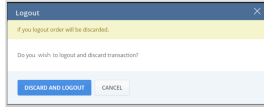
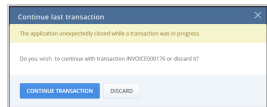
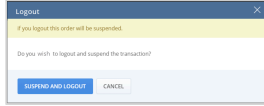
## Popup Windows for Log Out or Application Closure

Popup windows are displayed as a result of the following actions in the SCIS app:

1. Closing the SCIS App (by double clicking the Home button, then swiping up on the app's preview):
  - a. In the middle of an order, without payments applied.
  - b. In the middle of an order, with partial payments applied.
2. Logging out of SCIS when a sale is in progress:
  - a. In the middle of an order, without payments applied.
  - b. In the middle of an order, with partial payments applied.

The following table describes actions that trigger when a popup window is displayed and supported workflows for how to proceed.

Action	Workflow Options	Popup Window	Avalara Workflow
Close the SCIS App with an order in progress and <b>no payments</b> applied. (1.a)	The application is closed without any notification.	No pop-up is displayed.	If Avalara is activated, and the <b>Submit on Update</b> setting on the SCIS Settings record, is checked, when the sales associate logs in to SCIS a pop-up is displayed. The sales associate can resume the last order or suspend it.

Action	Workflow Options	Popup Window	Avalara Workflow
			 <p>Continue last transaction</p> <p>The application unexpectedly closed while a transaction was in progress.</p> <p>Do you wish to continue with transaction CASH041500717 or discard it?</p> <p>CONTINUE TRANSACTION DISCARD</p>
Close the SCIS App with an order in progress and <b>partial payments applied</b> . (1.b)	The application is closed without notification. When the sales associate logs in again, a pop-up is displayed. The sales associate can resume the last order or discard it.	Without Avalara the following popup is displayed.	<p>If Avalara is activated, the behavior is the same.</p>  <p>Continue last transaction</p> <p>The application unexpectedly closed while a transaction was in progress.</p> <p>Do you wish to continue with transaction RVOCE000175 or discard it?</p> <p>CONTINUE TRANSACTION DISCARD</p>
Log out of SCIS with an order in progress and <b>no payments</b> applied. (2.a)	When the sales associate clicks Sign Out in the user menu, a pop-up is displayed. The sales associate is given the option to discard the order and log out or cancel signing out.	Without Avalara the following popup is displayed.	<p>If Avalara is activated and the <b>Submit on Update</b> setting on the SCIS Settings record, is checked, SCIS shows this pop-up.</p>  <p>Logout</p> <p>If you logout order will be discarded.</p> <p>Do you wish to logout and discard transaction?</p> <p>DISCARD AND LOGOUT CANCEL</p> <p>After the sales associate logs in again, no modal is shown. The order was voided.</p>
Log out of SCIS with an order in progress and <b>partial payments applied</b> . (2.b)	When the sales associate clicks Sign Out in the user menu, a pop-up is displayed. The sales associate is given the option to suspend the order and log out or cancel the log-out action and go back to the cart.	Without Avalara the following popup is displayed.	 <p>Continue last transaction</p> <p>The application unexpectedly closed while a transaction was in progress.</p> <p>Do you wish to continue with transaction RVOCE000176 or discard it?</p> <p>CONTINUE TRANSACTION DISCARD</p>  <p>Logout</p> <p>If you logout this order will be suspended.</p> <p>Do you wish to logout and suspend the transaction?</p> <p>SUSPEND AND LOGOUT CANCEL</p>

# SuiteCommerce InStore Login

To start working with SuiteCommerce InStore (SCIS) you must first log in. Your login steps are different depending on whether or not you work in different locations, and whether or not your store uses advanced cash management. This section includes information about logging in.

- [Logging In](#)
- [Logging in with iOS Touch ID for SCIS](#)
- [Selecting a Printer](#)

## Logging In

To access SCIS, launch SCIS for iOS or SCIS for Windows. Then enter your login credentials.

### To log in to SuiteCommerce InStore:

1. Launch the SCIS POS application.
2. In the **Email** field, enter your email address.
3. In the **Password** field, enter the password provided by your manager or system administrator.



**Note:** After six failed login attempts you will be locked out, and you must wait 30 minutes to log in again.

4. Click **Login**. If you are only assigned one role, then you are automatically logged in as that role.
5. If you are assigned multiple roles, the list of available roles is displayed. Click the role you want to use.
6. Select a Sales Rep. This step is optional depending on your system configuration. For more information, see [Selecting a Sales Representative](#).

## Logging in with iOS Touch ID for SCIS

You can log in to SCIS using Touch ID. However, Touch ID must be already configured on the mobile device you are using for point-of-sale. The first time you log in to SCIS, enter your email address and password, and then check the **Touch ID Login** box. Your login credentials are stored in the device, and then Touch ID capabilities can be used in the future for logging in.


### To log in with iOS Touch ID for SCIS:

1. Start the **SCIS for iOS** mobile application.
2. Tap your fingerprint on the **Touch ID for SCIS** prompt.
3. If you have multiple roles, you can choose the role to log in. If you only have one role, you are automatically logged in to SCIS.

After entering your login credentials successfully, the SCIS main application page appears. Next, select a printer.

## Selecting a Printer

To generate receipts for each transaction, you must select a printer. A local printer is typically configured by the system administrator. You can select the printer you want to use from options displayed in the User Menu.


 **Note:** If your store uses Advanced Cash Management, then you must select a printer when you open a shift. For information, read [Opening the Cash Drawer with SCIS](#).

### To select a printer:

1. Click the User Menu.
2. Click **Select Printer**.
3. Select a printer from the list.
4. Click **Select**.

Receipts for all the transactions you submit will be output to that printer.

For more information about choosing a printer when opening a shift, read [Opening the Cash Drawer with SCIS](#).

 **Note:** You only have permission to complete the operations authorized for your role. The system administrator must specifically assign permissions to roles. For example, if your role does not have permission to add a discount or void a line in a transaction, you must request a manager override to complete those operations. For more information, see [Manager Override](#).

# SCIS Cash Drawer

## [Watch a Related Video](#)

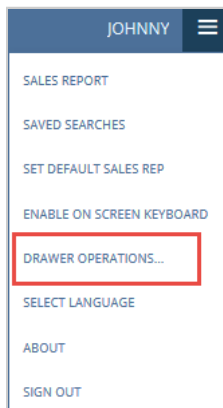
This section includes information for sales associates using a cash drawer with SuiteCommerce InStore (SCIS). After logging in to SCIS, the next task for sales associates is to enter the **Initial Loan** or **Open Shift** transaction at the beginning of a shift. At the end of the shift, sales associates must enter the **End of Day** or **Close Shift** transaction.



**Important:** The SuiteCommerce InStore mobile app is always required when using SCIS on an iPad, or with the Windows Operating System on a tablet or computer. Using SCIS on a desktop or laptop computer with a web browser such as Safari, Chrome, or Firefox is not supported.

The cash drawer opens automatically when you complete an order paid in cash. Note that your system administrator may have also configured the cash drawer to open automatically when you complete an order using a payment method other than cash.

When you need to open the cash drawer for any reason other than entering sales transaction, use the **Drawer Operations** option in the user menu.



Read the following topics to learn more about working with the cash drawer:

- [SCIS Cash Drawer Management Operations](#)
- [Opening the SCIS Cash Drawer with No Sale](#)
- [SCIS Advanced Cash Drawer Management Operations](#)

## SCIS Cash Drawer Management Operations

This section includes information for sales associates working in SuiteCommerce InStore (SCIS) **without** Advanced Cash Drawer Management. After logging in to SCIS, the next task for sales associates is to enter the Initial Loan transaction at the beginning of a shift. At the end of the shift, sales associates must enter the End of Day transaction.

### Opening the Cash Drawer with SCIS

At the beginning of a shift, you receive a cash drawer. Before you enter any sales transactions, you must enter an **Initial Loan** transaction to record the amount in the cash drawer. During the shift, the original amount in the drawer is increased and diminished based on transactions you perform.



### To enter an initial loan:

1. Log in to SuiteCommerce InStore.
2. In the User Menu, select **Drawer Operations**
3. Select **Initial Loan**.
4. Enter the total amount for each cash denomination in the cash drawer.

Initial Loan	
Total \$200.00	50 \$1.00
	10 \$5.00
	10 \$10.00
	ADD ROW
	CONFIRM CANCEL

5. Touch **Confirm** when you are finished.

After logging in and submitting the initial loan, you can perform sales transactions. Each transaction you enter with SCIS includes your name on the receipt and on the transaction saved in the system. Administrators and Store Managers can track the initial loan and sales transactions entered by each sales associate in the system.

## Closing the Cash Drawer with SCIS

At the end of each shift, the sales associate must enter the amount of cash that is in the cash drawer.

### To enter an End of Day cash drawer transaction:

1. Open the **User Menu**.
2. Select **Drawer Operations**.
3. Expand the User Menu.
4. Select **End of Day**.
5. Enter the amount of cash in the drawer. There is a separate row for each denomination.

End Of Day	
Total \$820.00	100 \$1.00
	20 \$5.00
	18 \$10.00
	22 \$20.00
	ADD ROW
	CONFIRM CANCEL

6. Click **Confirm** when you are finished.

After you complete the End of Day transaction, you can log out of SCIS.

A system administrator can view your End of Day transaction in the system. If there is a difference between the amount in the cash drawer and the expected amount of cash based on the sum of all transactions entered by sales associates, the discrepancy is displayed in the system.

## Opening the SCIS Cash Drawer with No Sale

Typically, the cash drawer opens automatically based on the payment method used on an order. However, you can use the No Sale option in the SCIS User menu to open the cash drawer without a sales transaction.



After you select this option, you are prompted to choose a reason for opening the drawer. The NetSuite administrator creates Open Drawer Reasons that you can choose from. Some reasons why you might need to open the cash drawer outside of a regular transaction are:

- Someone asks you to make change for them.
- You make a mistake, accidentally closing the cash drawer before giving the customer all of the change due.
- The drawer did not open as expected after you submitted a transaction.

## SCIS Advanced Cash Drawer Management Operations

- [Opening a Shift and Closing the Cash Drawer in SCIS](#)
- [Cash Drawer Adjustment](#)
- [Cash Drawer Activity](#)

### Opening a Shift and Closing the Cash Drawer in SCIS

This section includes information for sales associates working in SuiteCommerce InStore (SCIS) with Advanced Cash Drawer Management.

#### To enter an opening shift transaction:

1. Log in to SuiteCommerce InStore.

2. Enter the amount in the cash drawer. You can use the calculator or enter the number of bills in each denomination. Alternately, you can enter the amount of cash in the **Starting Cash** field.

Starting Cash

\$ **250.00**

CALCULATE DRAWER CASH

Denominations

\$100	—	0	+	\$5	—	0	+
\$50	—	1	+	\$1	—	0	+
\$20	—	5	+				
\$10	—	10	+				

**CONTINUE** **CANCEL** **BACK**

**Note:** The calculator overwrites any value entered manually. You must choose either to use the calculator or enter values manually. For example, if you type 100 in the Initial Loan field, and then use the calculator to add two 20s, the value is 40, not 140.

3. Select a printer and cash drawer combination.
4. Click **Continue** when you are finished.

After you have opened your shift, you can perform sales transactions. Each transaction you enter with SCIS includes your name on the receipt and on the transaction saved in the system. Administrators and Store Managers can track all of the shifts and sales transactions entered by sales associates.

If you need to add or remove cash from the drawer after you have opened a shift, create a cash drawer adjustment. For more information, read [Cash Drawer Adjustment](#).

At the end of each shift, the sales associate must close the drawer by entering the amount of cash that is in the cash drawer.

### To enter a closing drawer transaction:

1. Open the **User Menu**.
2. Select **Drawer Operations**.
3. Select **Close Shift**.
4. Count the cash in the drawer.
5. Enter the amount of cash in the drawer.

**Close Shift** [X]

Expected Amount: **\$760.00**

Please count cash in drawer and enter amount.

CALCULATE DRAWER CASH

End Amount: \$

**CONTINUE** **CANCEL**

**Note:** Depending on how the application is configured, you may not see the amount expected in the cash drawer. Sales associates must enter a note of explanation when closing a shift.

6. After you submit the closing shift transaction, the **Close Shift** receipt is printed and then you are automatically logged out of SCIS.

After you complete the Close Drawer transaction, you are automatically logged out of SCIS. You can view review the dates of your past shifts and view Close Drawer receipts in SCIS. For more information, read [Cash Drawer Activity](#).

## Cash Drawer Adjustment

After entering the initial loan (or the opening drawer transaction) a sales associate may need to add or remove cash from the drawer. For example, the sales associate may have been given extra cash to pay a vendor from the cash drawer. SuiteCommerce InStore (SCIS) provides the capability to track this influx and outflow as a cash drawer adjustment.

### To perform a cash drawer adjustment:

1. From the User Menu, select **Drawer Operations**.
2. Select **Adjustment**. The Drawer Adjustment dialog screen appears.
  - a. Select **+ Cash In** if you are adding cash to the drawer. Select **- Cash Out**, if you are removing cash from the drawer.
  - b. Enter the amount of cash.
  - c. Enter a reason for making this adjustment.
3. Click **Apply**.

## Cash Drawer Activity

Sales associates can use the Drawer Activity page in SuiteCommerce InStore (SCIS) to view the dates of past shifts, and closing receipts.

### To view drawer activity:

1. From the User Menu, select **Drawer Operations**.
2. Select **Drawer Activity**.
3. The **Drawer Activity** list is displayed. Here, you can click **Receipt** to view the details on the receipt submitted for each closing a shift.

## SCIS Store Manager Permission to Close Shifts

Employees with the SCIS Store Manager role can close shifts for sales associates at the store. The SCIS Store Manager can see the list of the shifts created in their location, and close shifts that are open. This capability is useful when an sales associate is called away unexpectedly, and forgets to close a shift, or is unable to close a shift on their own.

Drawer activity							
Shift ID	Employee	Drawer	Started	Ended	Expected Cash	End Cash	Action
10	John B Wolfe	Register-1	06/13/2018 04:35 PM	06/13/2018 04:35 PM	\$100.00		CLOSE SHIFT
9	June Wolfe	Register-2	06/13/2018 04:09 PM	06/13/2018 04:09 PM	\$150.99		CLOSE SHIFT
1	Sylvia Jones	Register-1	01/01/2018 07:00 AM	01/01/2018 07:00 AM			RECEIPT
7	John B Wolfe	Register-1	06/13/2018 01:33 PM	06/13/2018 01:33 PM	\$388.46	\$388.46	RECEIPT



**Warning:** An SCIS Store Manager can interfere with an employee's active shift. Before closing another employee's shift, make sure the sales associate has already logged out.

### To close a shift for a sales associate:

1. From the User Menu, select **Drawer Operations**.
2. Select **Drawer Activity**.
3. You can view the list of all shifts in your location.
  - Shifts that are still open, show **Close Shift** in the Action column.
  - Shifts that are already closed, show **Receipt** in the Action column.
4. Click **Close Shift**. You must complete the closing drawer tasks: count the amount of cash in the drawer, enter the amount in the drawer, and then submit the closing drawer transaction.

# SCIS Fallback for Sales Associates

Fallback enables sales associates to perform basic point-of-sale operations when SuiteCommerce InStore (SCIS) is not available. Sales associates can continue entering orders in Fallback, but some features normally available from the shopping cart are not available.

For more information about using Fallback, read the following:

- [SCIS Fallback Login](#)
- [Fallback Shopping Cart](#)

## SCIS Fallback Login

Sales associates use a Personal Identification Number (PIN) to log in to Fallback. Administrators or Store Managers must share the PIN with employees. All employees in a certain location use the same PIN.

### To log in to Fallback:

1. To log in to Fallback, you can use:
  - The login window
  - The Fallback option in the User Menu
2. Enter the PIN.
3. Tap **Enter Fallback**.
4. The Fallback shopping cart displays, and you can start entering orders in Fallback.

Although you can use Fallback at any time by selecting the option in the User Menu, you should use Fallback only when SCIS is not available.

## Fallback Shopping Cart

The shopping cart in Fallback looks and operates like the shopping cart in SCIS, but with limited features. Note the following differences:

- Black and white color scheme.
- No product images.
- No related items or upsell items are displayed in the cart.
- Voided lines are automatically removed from the cart.
- Only limited payment options are available in Fallback.
- The following features are **not** supported in Fallback:
  - Returns, refunds, and quotes
  - Currency rounding
  - Save for later
  - Shipping and in-store pickup
  - Order fulfillment tasks
  - Adding promotions

- Selling gift cards
- Using gift certificates for payment

To learn more about working in the Fallback shopping cart, read the following topics:

- [Enter an Order in Fallback](#)
- [Assign a Customer to an Order in Fallback](#)

## Enter an Order in Fallback

The following instructions include operations commonly performed in the shopping cart such as adding items, applying discounts, and selecting a payment option.

### To enter an order in Fallback:

1. (Optional) Assign a sales rep to the order.  
Use the same procedure in Fallback as you use in SCIS online. For more information, read [Selecting a Sales Representative](#).
2. (Optional) Assign a customer to the order.  
For more information, read [Assign a Customer to an Order in Fallback](#).
3. Add items to the cart.  
To add items to an order, use the QuickAdd bar, a barcode scanner, or find the item using search. For step-by-step instructions on adding items to an order, read [Adding Items to a Sales Transaction in SCIS](#).
4. (Optional) Add a discount to the line item or to the whole order.



**Note:** Use a custom discount instead of a promotion code. Promo codes are not supported in Fallback.

- a. Touch or click the **line item price** to apply a discount to an item in the cart. Touch or click the **subtotal** of the transaction to apply a discount to the entire order.
  - b. In the **Select Discount** window, touch or click **Custom Discount**.
  - c. Enter the discount as a percentage, flat rate discount, or enter a new price for the item. Then choose one of the predefined reasons for the custom discount.  
If you choose **custom reason**, enter the reason in the text box. For example, you may be entering a custom discount because promotion codes are not supported in Fallback. In the text box, you might type, "Replacing Promo Code X."
  - d. Touch or click **Apply**.
5. (Optional) Add a note to the order.  
Touch or click the note icon under the line item or below the payment options. For more information, read [Adding Notes to Items and Transactions in SCIS](#).
  6. Select a payment method.



**Note:** Some of the payment methods that you use in SCIS, may not be available in Fallback. The system administrator is responsible for setting up payment methods that can be used in Fallback.

The following payment methods are supported in Fallback:

- **Cash**

For more information, read [Paying with Cash](#).

- **External PIN Pad**

This includes google wallet, credit cards, and all-in-one payment methods. For more information, read [Paying with a Credit Card](#).

- **Check**

For more information, read [Paying with a Check](#).



**Warning:** You must complete orders in either SCIS or Fallback. Do not start an order in SCIS, and then switch to Fallback to complete the order.

## Assign a Customer to an Order in Fallback

While in Fallback, the customer profile is not available, and you cannot create new customers, or edit customer information. However, you can use the **Assign Customer** link in the cart to assign a customer to an order in Fallback. Assigning a customer to an order is not required.

### To assign a customer to an order in Fallback:



1. Click or touch the **Assign Customer** link.
2. Enter a customer identifier in the popup dialog window.  
The customer identifier can be an email address or a customer ID. You must enter at least one identifier to assign a customer to an order in Fallback. Entering the or the customer's first or last name is optional.
3. Touch or click **Save**.

## Resuming an Order in Fallback

When working in Fallback, you do not have the ability to save or resume an order that is in progress by clicking a button, like you do in SCIS online. However, if you enter a partial payment on an order, then log out of Fallback for some reason, or switch to SCIS online, the incomplete Fallback transaction is saved on the device.

There is no option to discard the transaction if partial payment has already been applied. Any sales associate with the appropriate Fallback PIN can resume the transaction while in Fallback, and then finish applying payments.

If there are suspended orders in Fallback, there is a red dot on the pause icon at the top of the screen.

Search 						
ID	DATE & TIME	TYPE	CUSTOMER	TOTAL	SALES REP	
 PROPOP82	02/02/18 - 5:21PM	Sales Order	customer@domain.com	\$23,000	Derek Moore	



**Tip:** At the end of a shift, ensure that there are no partially paid transactions suspended in Fallback.



# Entering Transactions Using SuiteCommerce InStore

- [Entering a Sales Transaction in SCIS](#)
- [Accepting Payments for Purchases in SCIS](#)
- [Manager Override](#)
- [Fulfilling Orders for Shipping and Pickup with SCIS](#)
- [Entering Quotes in SCIS](#)
- [Discounts and Markups in SCIS](#)
- [Applying Promotion Codes to Transactions in SCIS](#)
- [Working with Gift Cards in SCIS](#)
- [Processing Returns in SCIS](#)
- [Processing an Exchange in SCIS](#)
- [Processing Refunds with SCIS](#)
- [Working with Credit Memos in SCIS](#)
- [Viewing a Sales Report in SCIS](#)
- [Viewing a Saved Search in the SCIS User Menu](#)
- [Printing Receipts from the Transaction History](#)

## Entering a Sales Transaction in SCIS

Sales transactions are the core of SuiteCommerce InStore (SCIS). The general workflow for entering transactions in SCIS is to: add a customer (as needed), add items to the order, add the discount (if applicable), and finally accept payment.



To understand more about performing sales transactions, read the following:

- [Adding Items to a Sales Transaction in SCIS](#)
- [Selecting a Sales Representative](#)
- [Adding a Serialized or Lot Numbered Item to an SCIS Order](#)
- [SCIS Store Pickup and Orders for Delivery](#)
- [Delete, Save, or Resume a Transaction in SCIS](#)
- [Adding Notes to Items and Transactions in SCIS](#)
- [Accepting Payments for Purchases in SCIS](#)

To learn how to add a customer to a transaction, read [Adding Customers To Sales Transactions in SCIS](#).

## Adding Items to a Sales Transaction in SCIS

After selecting the customer on a sales transaction, you must add items to the cart. SuiteCommerce InStore (SCIS) enables you to add items to a transaction in the following ways:

- [Adding Items Using the QuickAdd Bar](#)
- [Adding Items Using a Barcode Scanner](#)
- [Adding Items from the Search Results Page](#)
- [Adding Items to an Order from a Product List](#)

**Note:** Save for later is not supported in SCIS Fallback.

**Note:** You can add an item even if the inventory shows zero at your location. If an item is not on hand, you can advise the customer if shipping is available from another location.

### Adding Items Using the QuickAdd Bar

A QuickAdd key for each item is displayed on the QuickAdd bar. You can use the QuickAdd bar to find items to add to a sales transaction.

#### To select an item using QuickAdd keys:

1. Expand the QuickAdd bar by clicking the tab on the main application page.



2. Select the QuickAdd group that includes the item you want to add. The system administrator defines QuickAdd groups to organize items on the QuickAdd bar.
3. Click **Add**. If you need to add more than one item, add the item to the cart, and then modify the quantity in the cart.
4. When you have finished adding items, you can collapse the QuickAdd bar.

### Adding Items Using a Barcode Scanner

If you have a barcode scanner connected to your tablet, you can add an item to the cart by scanning the bar code on the item label. See your barcode scanner documentation for more information.

### Adding Items from the Search Results Page

You can add items to a transaction directly from the search results page. Search for an item based on the item name, SKU, or keywords used in the description.

#### To add an item from a list of search results:

1. Click in the **Search** bar at the top of SuiteCommerce InStore.
2. Enter the name of the item you want to search.

3. Click the **Items** tab. You can click the item image or the item name to view the product detail page which displays more information.
4. (Optional) Filter the search results. Use the icons at the top of the search results page:
  - **List** – Click to display the search results as a list.
  - **Grid** – Click to display the search results as a table.
  - **Sort By** – Select to sort the search results based on price.

From the search results page, you can click Add to add the item to the current transaction. Also, you can click the item name to access the product detail page.

## Adding Items to an Order from a Product List

Items that are saved for later on a product list are accessible from SuiteCommerce InStore (SCIS) and from your organization's website.

### To order an item from a product list:

1. Find the customer in SCIS.
2. Click or touch the customer name to view the Customer Profile. The product list (or wish list) is displayed in the Customer Profile.

Wish Lists (1)	
LIST	QTY
<div> <div>▼</div> <div>Carlos' Items</div> </div>	2
<div>ADD</div>	

3. Click or touch Add to add the items to an order.

Using SCIS, you can also save a item to a customer's product list. Customers can log in to their customer account online, and then purchase the item.

### To save an item for later:

1. Add the customer to the order as described in [Adding Customers To Sales Transactions in SCIS](#).
2. Click the item action menu, then click **Save**.



3. Enter a product list name, then click **Create and Add Item**. If a customer has previously created a list, you can select the list.
4. Click the X in the upper right corner to close the popup.

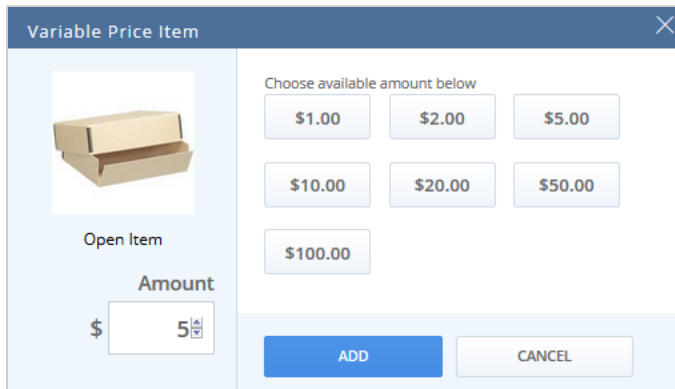
## Adding an Open Item

The open item is a generic, variable price item created by the administrator, and then used by sales associates. You can use the open item to sell items that may not have a price. Set the price of the open item after it is added into the cart. For example, if the customer wants to buy a floor model, you can add it to the order, and then set the price in the cart.

### To add an open item to an order:

1. Find the open item using **Search** or the **QuickAdd Bar**.

- Click **Add**. The Variable Price Item screen appears.



The Variable Price Item screen is a modal window with a title bar and a close button. It is divided into two main sections. The left section features an image of a cardboard box, the text 'Open Item', and a numeric input field labeled 'Amount' with a dollar sign and a spinner showing the value '5'. The right section is titled 'Choose available amount below' and contains seven buttons with the following values: \$1.00, \$2.00, \$5.00, \$10.00, \$20.00, \$50.00, and \$100.00. At the bottom of the right section are two buttons: 'ADD' and 'CANCEL'.

- Enter a price, and then click **Add**.

The open item is then added to the order with the price you entered. Complete the order by accepting payment and providing the customer with a receipt.

## Selecting a Sales Representative

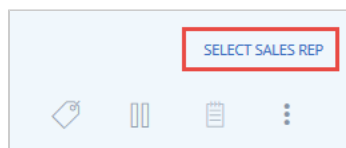
When performing a sales transaction in SuiteCommerce InStore (SCIS), you have the option to assign a sales representative to the transaction.

Employees defined as Sales Reps can participate in commission plans. Transactions attributed to sales representatives can be used to determine commissions or calculate sales metrics. When you assign a sales representative to a transaction, this information is stored as part of the transaction record.

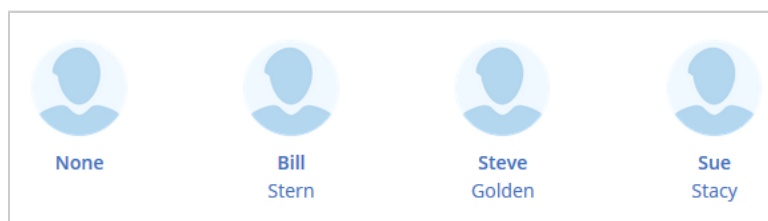
**Note:** Depending on how your system is configured, selecting a sales representative may be required before you can perform a transaction.

### To select a sales representative:

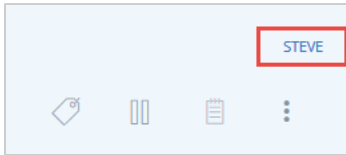
- Log in to SuiteCommerce InStore.
- Click **Select Sales Rep** in the transaction summary.



- Click the name of the sales representative you want to select.



The name of the sales representative appears at the bottom of the transaction summary.



### To change the current sales representative:

1. Click the name of the current sales representative in the transaction summary.
2. Click the name of the new sales representative you want to select.
3. Select **None** if you do not want to associate a sales representative with the transaction.

## Adding a Serialized or Lot Numbered Item to an SCIS Order

To add a serial numbered or lot numbered item to the shopping cart, first find the item, and then set the serial or lot number of that item. The item is added to the cart after the serial or lot number is confirmed.

### To add a serialized item or lot numbered item to the cart:

1. Find the item using any one of the following methods:

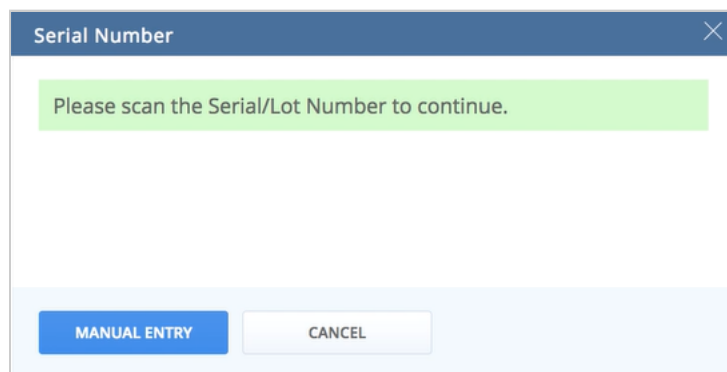
- Click Add from the QuickAdd bar
- The search bar
- From the Product Detail Page (PDP)



**Note:** Serialized items can be matrix items with matrix options. Matrix item options can be set on the item's PDP.

- Barcode scan

2. Assign the serial number to the item. After the item is added to the cart, a popup dialog appears. You can use a barcode scanner to read the serial number from a label on the item, or click **Manual Entry** to choose a serial number from a list.



3. Click a payment option to complete the order.

Note the following limitations for selling serialized items and lot numbered items with SCIS:

- You cannot set the quantity of serialized or lot items in SCIS. A single line item is always added to the cart. You can add multiple items to the cart, but each line item must have a unique serial or lot number.

- Serial and lot numbered Items are not eligible for delivery orders with SCIS. This is because the serial or lot number must be defined on the order prior to delivery.

## SCIS Store Pickup and Orders for Delivery

You can enter an order in SuiteCommerce InStore (SCIS), and then have the customer pick up the order at a different store location, or have items shipped.

### Customer Information is Required

Store pick up and delivery orders require selecting or adding customer. The minimum information required for these order types is the customer's name, street address and email address. If you remove, modify or replace the customer while the transaction is open:

- Items configured to be shipped to the customer's address are removed from the order.
- Items configured for pickup at another store are kept in the order, but the pickup information is removed. The items are reconfigured as default purchase items, without delivery or pickup. This default purchase method is sometimes called "cash and carry."
- Items configured as default purchases, without delivery or pickup, are unchanged.

You should ensure the customer's information is accurate before adding items to a store pickup or delivery order.



**Tip:** For information about adding notes to items in an order, read [Adding Notes to Items and Transactions in SCIS](#).

### To order an item for store pick up or delivery:

- Select a customer, or add a new customer.
- Add one item or more to the transaction.
- Click the Item Action menu under the item for Store Pickup, then click **Order**.



- Click **Pickup**.
  - Select a store location where the customer can pick up the order.
  - Click **Order**.

### To order an item for delivery:

- Select a customer, or add a new customer.
- Add one item or more to the transaction.
- Click the Item Action menu under the item for delivery, then click **Delivery**.
- Select an existing address for the customer or click **Add a new address**. By default, SCIS uses the address defined in the customer profile.

If you choose to add a new address, complete the following steps:

- Click **Add a New Address**.
- Enter values for each of the required fields. Required fields are those fields marked with an asterisk (\*).
- Select the following options that apply (you can choose more than one):
  - This is a Residential Address** – marks the address as a residential address for delivery purposes.

- **Default Billing Address** – designates this address as the default billing address for this customer.
  - **Default Shipping Address** – designates this address as the default shipping address for this customer.
- d. Click **Add**.
  5. Select a shipping method.
  6. Click **Order**

After clicking **Order**, the following changes appear in the transaction:

- The delivery icon appears below the item in the Cart. Click this icon to edit the shipping address if necessary.
- The shipping charges are added to the transaction summary. Click the amount in the transaction summary to void shipping and handling charges.

## Delete, Save, or Resume a Transaction in SCIS

In SuiteCommerce InStore (SCIS), you can delete a transaction or save it. Saved transactions can be resumed later.

### Deleting a Transaction

Deleting a transaction is useful if you have made a mistake and you want to start building the transaction from the beginning. You can also delete an order that has been saved. To delete a transaction, click the trash can in the Transaction Summary. After a transaction is deleted, there is no record of that transaction in NetSuite.

The screenshot shows a transaction summary with the following details:

SUBTOTAL	\$30.99
TAX	\$0.00
TOTAL	\$30.99
AMOUNT DUE	\$30.99

Below the totals are three buttons: **CASH**, **CREDIT CARD**, and **OTHER PAYMENT** (with a dropdown arrow). At the bottom, there is a section for **ORDER #TO BE GENERATED** and **SELECT SALES REP**. In the bottom navigation bar, the **DELETE** button (represented by a trash can icon) is highlighted with a red box.

If you created a new customer and added that customer to the transaction, deleting the transaction does not affect the customer record. The customer record that you created is still in place.

### Saving an Order

Saving (or suspending) an order is useful if the customer is not ready to complete the order at the moment, but you are certain that the customer will complete the order later. To save a sales transaction, click the Pause icon.

**Note:** You cannot save an order that has been partially paid, or an order with a single use promotion applied.



You can access saved orders at the top of the Transaction Summary.

## Resuming an Order

To resume a saved order, click the Saved list at the top of the Transaction Summary.



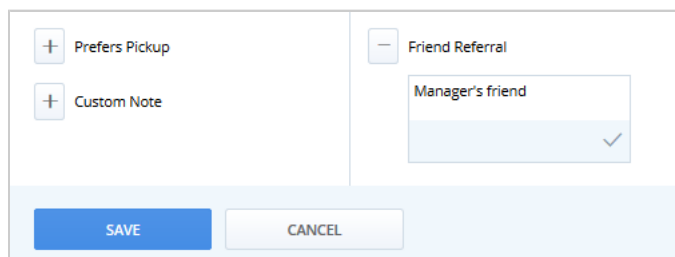
A popup displays showing a list of saved orders. Click the arrow next to the order you want to resume. Click **Resume**.

## Adding Notes to Items and Transactions in SCIS

You can add a note to an line item on an order or to the entire transaction. This is useful for adding information to an order. For example, you may want to add a note that the customer was referred by a friend, or that the customer prefers pickup.

### To add Notes to a transaction:

1. Touch or click the note icon under an item in the cart or in the transaction summary area. A screen pops up where you can select a preset note.



2. Select a note type.
3. Add more information if needed.
4. Click Save.

After you have added a note to a transaction, a red circle appears on the note icon. If you see this on a saved order, then you know that a note was entered by the previous sales associate.

## Accepting Payments for Purchases in SCIS

SuiteCommerce InStore (SCIS) supports multiple payment methods. After you have added items to the customer's cart, the transaction summary shows a button for paying with cash, a button for paying with a



credit card, and a button for paying with other payment methods. The payment methods available in SCIS are based on configuration performed by the system administrator.

For more information, read the following topics:

- [Paying with Cash](#)
- [Paying with a Credit Card](#)
- [Paying with a Check](#)
- [Paying with a Gift Card](#)
- [Purchase On Account](#)



**Note:** The Print Receipt button is only displayed on tablets running SCIS for iOS or SCIS for Windows.

## Paying with Cash

Cash denominations are configured by the system administrator for SuiteCommerce InStore (SCIS). When you click the Cash button in the Transaction Summary, you can use QuickCash buttons to enter the amount received from the customer.

### To accept a cash payment:

1. Add items to a transaction as described in [Adding Items to a Sales Transaction in SCIS](#).
2. Click **Cash**.
3. Enter the amount received. You have three options:
  - **Quick Cash** – Use the QuickCash buttons to increment the amount received from the customer.
  - **Manual** – Type the amount of cash received from the customer in the **Amount Tendered** field.
  - **Tender Up** – Click this button to automatically enter a value equal to the next highest increment. For example, if the total due is \$20.90, the Tender Up button inserts \$30.00 in the **Amount Tendered** field.
4. Click **Apply Payment**.
5. Provide the receipt to the customer.

If the amount received is equal to or greater than the total amount due, then the transaction is complete and the customer receipt displays on the screen. If the amount received is less than the amount due, then the amount received is calculated and SuiteCommerce InStore returns to the transaction screen. You can choose an additional form of payment.

## Paying with a Credit Card

Authorized credit cards are configured by the system administrator for SuiteCommerce InStore (SCIS). After you tap **Credit Card** in the **Transaction Summary**, you can swipe the customer's credit card. If the card does not swipe correctly, you can manually enter the credit card number.

### To enter a credit card payment:

1. Add items to a transaction as described in [Adding Items to a Sales Transaction in SCIS](#).
2. Click **Credit Card**.

3. Enter credit card information automatically by having the customer swipe or insert their card using a payment device, such as a PIN pad.

To manually enter credit card information, click **Manual Entry**.

- a. Enter the credit card information. All fields are required to validate the credit card transaction.
  - b. Click **OK**.
4. Ask for the customer's signature on the tablet.
  5. Click **Apply Payment**.
  6. Provide the receipt to the customer.

## When a Credit Card is Declined

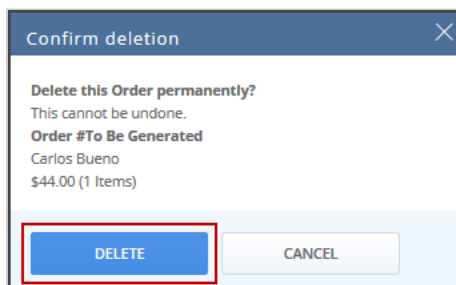
If a customer's credit card payment is declined, the customer can pay using a different card or method. However, if the customer decides not to finish the purchase, you must delete the order to void the transaction.

### To end a transaction when the credit card is declined:

1. Go to the **Transaction Summary**.
2. Tap **Delete**.



3. Tap **Delete** in the Confirm Deletion popup.



After you delete a declined-credit card transaction in SCIS, the transaction is saved in NetSuite for reference purposes. The transaction **Status** is set to **Closed**, and the **Memo** field displays **Void**.

## If an Invoice Fails to Save for a Credit Card Payment

Credit card payments include behind-the-scenes steps that save an invoice in NetSuite. In some instances where a credit card is approved and taken as payment, the transaction could fail to complete those NetSuite steps.

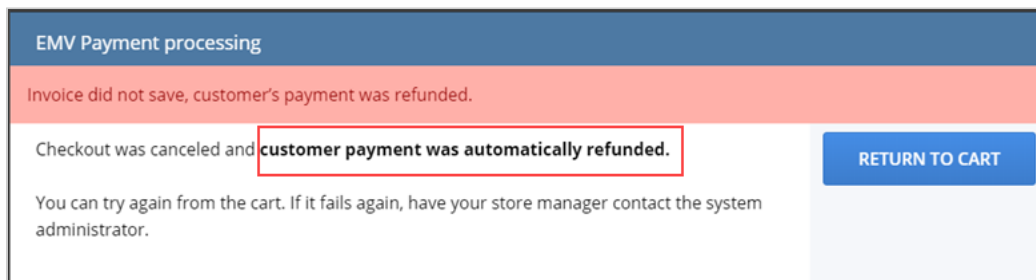
Because the failure happens after payment was drawn from the card, the customer must receive a refund. SCIS attempts to perform a refund to the card automatically. If the attempt fails, manual intervention through a system administrator is needed.



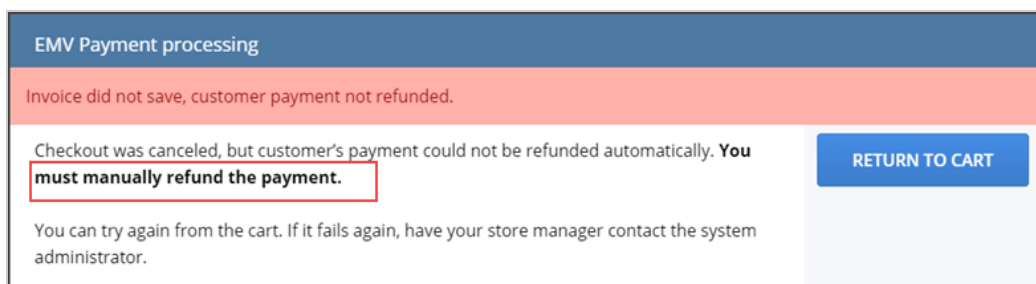
**Important:** The customer's payment must be refunded before you can attempt to take payment again

If this error occurs, you will receive one of two alerts:

- **Customer payment was automatically refunded** — This alert means that no action is needed from you for the refund. You should:



1. Tap **Return to Cart**
  2. Try submitting the payment again.
  3. If the error continues to happen, notify your store manager. Ask for instructions on how to proceed with your customer.
- **You must manually refund the payment** — The automatic refund failed to complete. An administrator must set up the refund in NetSuite. Then you can attempt to complete the sales transaction.



1. Ask your store manager to contact the system administrator.  
The administrator will find the customer's payment in NetSuite and make the refund. The admin will notify your store manager when the refund is complete. (Administrators, see the help topic [Refunding an Open Balance](#).)
2. When you are notified by your manager to proceed, tap **Return to Cart**.
3. Try submitting the payment again.
4. If the error continues to happen, notify your store manager. Ask for instructions on how to proceed with your customer.

**Note:** Failure to save an invoice is not due to an issue with the credit card. Your customer can try to pay again using the same card, a different card, or another payment method, such as cash.

## Paying with a Check

Authorized payment methods are configured by the system administrator for SuiteCommerce InStore (SCIS). If you are allowed to accept a personal check for payment, the option will be available to you in the Transaction Summary.

### To accept a check payment:

1. Add items to a transaction as described in [Adding Items to a Sales Transaction in SCIS](#).

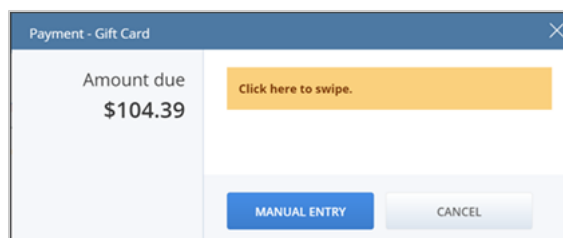
2. Click **Check**.
3. Enter the amount on the check. You have three options:
  - **Quick Cash** – Use the QuickCash buttons.
  - **Manual** – Type the amount of cash received from the customer in the **Amount Tendered** field.
  - **Tender Up** – Click this button to automatically enter a value equal to the next highest increment.  
For example, if the total due is \$20.90, the Tender Up button will insert \$30.00 in the Amount Tendered field.
4. Click **Next**.
5. Enter the **Check Number**.
6. Click **Apply Payment**.
7. Provide the receipt to the customer.

## Paying with a Gift Card

Gift cards are configured by the system administrator for SuiteCommerce InStore (SCIS). If you are allowed to accept gift cards for payment, the option is displayed under **Other Payment**.

### Accepting payment with a gift card:

1. Add items to a transaction as described in [Adding Items to a Sales Transaction in SCIS](#).
2. In the transaction summary window, select **Other Payment**, then select **Gift Card**.
3. Enter the gift card information:
  - If the gift card is a physical card, you can swipe the card or scan the card's barcode.
  - If the gift card is a digital gift certificate, tap **Manual Entry**, enter the authorization code and then tap **Next**.



4. Enter the amount you want to apply, then click **Apply**.

**Note:** A customer can apply part or all of the gift card to the balance of the transaction

5. Provide the receipt to the customer.

The amount applied appears in the transaction summary and the amount due is updated. To apply multiple gift certificates to a transaction, repeat the procedures above.

## Purchase On Account

In SuiteCommerce InStore (SCIS), the **Purchase On Account** option enables customers to purchase items using payment terms that an administrator has already set up in NetSuite. After selecting a customer on

the order, you can select the Purchase on Account option from the list of Other Payment options. When an order is placed using Purchase on Account, an invoice is created in NetSuite.

**Note:** Subsequent payments on the order can only be made in NetSuite.

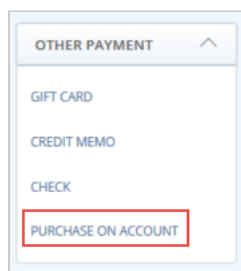
If the customer already has terms defined on the customer record, those terms are preselected in SCIS. If the sales associate is entering a new customer at point of sale, then the sales associate can choose from the list of customer payment terms defined by the Administrator in NetSuite.

### To use Purchase On Account:

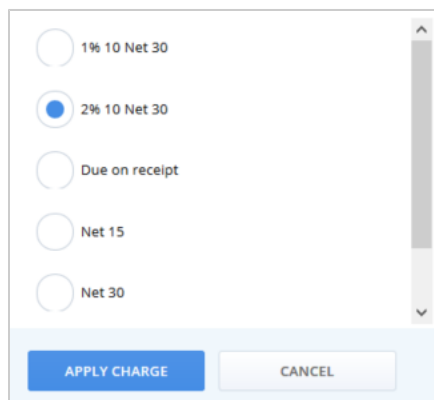
1. Add items to a transaction as described in [Adding Items to a Sales Transaction in SCIS](#).

**Note:** You must select a customer or enter a customer to complete an order using Purchase on Account.

2. Select **Other Payment**, then select **Purchase On Account**.



3. Choose payment terms for the customer, or accept the terms that are preselected.



4. Provide the receipt to the customer.

## Manager Override

To complete an operation that is restricted in SuiteCommerce InStore (SCIS), a system administrator must configure authorized roles on payment methods and a SCIS Access Code on employee records. An employee is not allowed to perform an operation for which he or she does not have permission.

For example, a manager may be required to authorize the transaction when an item is voided from an order. In this case, an alert message requesting a SCIS Access Code displays preventing the sales

associate from proceeding with the order. The sales manager must enter a SCIS Access Code in the alert box to allow the sales associate to proceed.

**Note:** The NetSuite administrator can enter a value for SCIS Access Code on the Custom subtab of the Employee record. SCIS Access Codes must be communicated to employees who are required to perform manager overrides.

## Fulfilling Orders for Shipping and Pickup with SCIS

Sales associates can use SuiteCommerce InStore (SCIS) to process orders for shipping and orders for pickup in-store. Click or touch the shopping bag icon in the SCIS header bar to view a list of all the orders that are ready for processing.

<div> <div>ORACLE   NETSUITE</div> <div></div> <div>1 SAVED JOHNNY</div> </div>					
<div> <div>Fulfillment Request</div> <div>1 Any Type</div> <div>2 Any Status</div> </div>					
3	Document Number	Name	Fulfillment Type	Date	Status
▼	122851	Marlo Jones	Store Pickup	7/10/2017 3:51 pm	New <span>OPEN</span>
▼	122853	Helen Morales	Ship	7/13/2017 8:00 am	New <span>OPEN</span>
▼	122852	Carlos Bueno	Ship	7/11/2017 4:18 pm	✓ Packed - Johnny B <span>OPEN</span>

Page Element	Description
1 Fulfillment type filter	<p>Select one of the following to view a certain type of fulfillment request in the list:</p> <ul style="list-style-type: none"> <li>Any Type</li> <li>Ship</li> <li>Store Pickup</li> </ul>
2 Order status filter	<p>Select one of the following to view a certain type of order status:</p> <ul style="list-style-type: none"> <li>Any Status</li> <li>New</li> <li>In Progress</li> <li>Picked</li> <li>Packed</li> </ul> <p><b>Note:</b> By default, packages that have been shipped are not displayed on the Fulfillment Request list.</p>
3 Column headers	<p>You can click on each column header to sort the list as you wish.</p> <p>The following information is displayed:</p> <ul style="list-style-type: none"> <li>Document Number</li> <li>Customer Name</li> <li>Fulfillment Type – Shows Ship or Pickup.</li> <li>Date – Shows the date and time of the order.</li> <li>Status – Shows the current status of the order.</li> </ul>

Page Element	Description
	Orders remain open until they are shipped. If the Open button is dim, that means you cannot access the order. Either someone else is working on the order, or it is being fulfilled from a location other than your own.

For more information, read the following topics:

- [Fulfilling Orders for Shipping](#)
- [Preparing Orders for Pickup In-Store](#)

**Note:** The following are limitations to ship from store and pickup in store capabilities:

- Serialized inventory and lot numbered items cannot be shipped.
- Partial quantities cannot be shipped or picked up in store. If the entire quantity on a line item is not available, then you must reject that line on the picking list. The order appears on the Fulfillment Request list again, assigned to a different location for processing.

## Fulfilling Orders for Shipping

When you fulfill orders for shipping, you must go through each step in the process of order fulfillment: picking, packing and shipping. When you are working on an order, the order is displayed on the list as in progress, along with your name.

Document Number	Name	Fulfillment Type	Date	Status	
122851		Store Pickup	7/10/2017 3:51 pm	New	<a href="#">OPEN</a>
122852		Ship	7/11/2017 4:18 pm	✓ Packed - John B Wolfe	<a href="#">OPEN</a>
122854		Ship	9/14/2017 12:20 pm	Picked - John B Wolfe	<a href="#">OPEN</a>

Only the sales associate who is working on an order can complete the fulfillment process. After you complete each step in the process, you are directed back to the Fulfillment Request page to complete the next step.

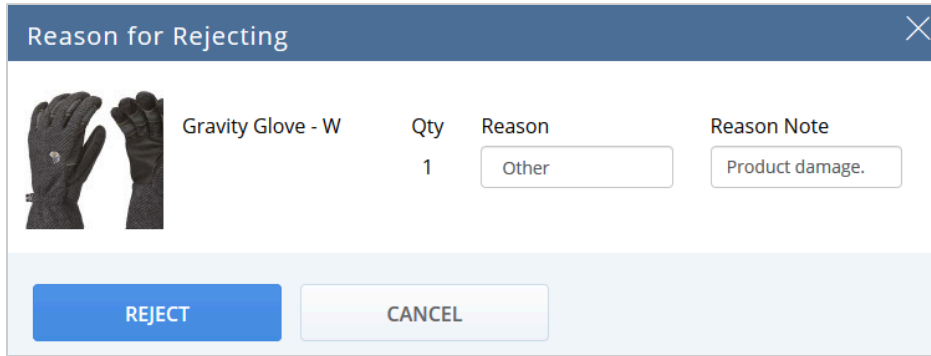
### To pick an order for shipping:

This is the first step in preparing the order for shipping. You are taking and collecting the items from the stock in the warehouse, or wherever the items are stored at your location.

1. Click the shopping bag icon to be directed to the **Fulfillment Request** list.
2. Find an order on the list with Fulfillment type set to **Ship** and status **New**.
3. Click or touch **Open**.
4. On the **Ship Request** page, you can:
  - Choose **Pick**.

**Note:** You cannot ship partial quantities. If not all of the items are available for picking, you must reject the whole line on the picking list.

- Choose **Reject**. If you choose Reject, you must select a reason and enter a note. When you reject an item for fulfillment, the fulfillment remains open.



A dialog box titled "Reason for Rejecting" with a close button (X) in the top right corner. It contains a table with the following data:

	Gravity Glove - W	Qty	Reason	Reason Note
		1	Other	Product damage.

At the bottom of the dialog box are two buttons: "REJECT" (blue) and "CANCEL" (light blue).

5. If you chose **Pick**, then you are directed back to the **Fulfillment Request** page.

### To pack an order for shipping:

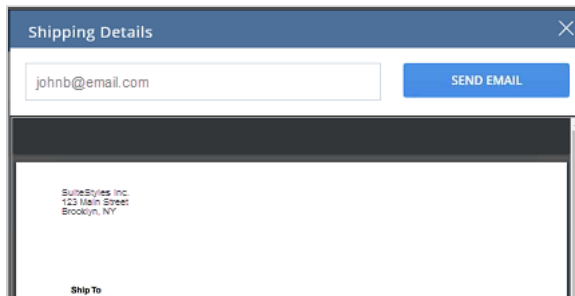
In this step you are placing the order into a box in preparation for shipping.

1. Find the order that you have picked. It is displayed in the Fulfillment Request list with the status of **Picked**, along with your name. The order is still Open.
2. Click **Open**. You are directed to the Ship Request page.
3. Click **Print** to print the receipt and include it in the box for shipping to the customer.
4. Put items from the order in the box along with the receipt.
5. Click **Shipping Method**. The shipping method you select here determines the shipping label available for printing in the last step of the fulfillment process.
6. Click **Pack**. You are directed back to the Fulfillment Request page.

### To label and ship the order:

In this step you are labeling the box in preparation for shipping.

1. Find the order that you have packed. It is displayed on the Fulfillment Request list with the status of **Packed**, along with your name. The order is still Open.
2. Click **Open**. You are directed to the Ship Request page.
3. Click **Label Package**. The Shipping Details window pops up. Depending on the shipping method selected, a shipping label with a barcode is displayed.
4. Print the label and attach it to the box. It is recommended that you send the PDF shown in the Popup for printing. Enter the email address, then click Send Email. The administrator should have configured the system to print shipping labels in PDF format.



A dialog box titled "Shipping Details" with a close button (X) in the top right corner. It contains an email input field with the text "johnb@email.com" and a "SEND EMAIL" button. Below this is a large text area displaying the following address:

SuiteStyles Inc.  
123 Main Street  
Brooklyn, NY

At the bottom of the text area is the label "Ship To".



5. After the order has been handed over to the shipping company, you can click or touch **Mark Shipped**.

## Preparing Orders for Pickup In-Store

The workflow described below assumes that you are working directly with the customer.

### To prepare an order for pickup in-store:

1. Click the icon to be directed to the **Fulfillment Request** list.
2. Find an order that is labeled **Pickup**, and has the status of **New**.
3. Click **Open**.
4. On the **Store Pickup Request** page, choose **Pick**. You must pick the quantity of items specified on the order.



**Note:** You cannot pick partial quantities. If not all the items are available for picking, you must reject the whole line on the picking list.

5. Click **Print** to print the receipt and give it to the customer.
6. Click **Pick**, and then hand the order over to the customer. You are redirected back to the **Fulfillment Request** page.

## Adding an Item to the Order for Pickup

If the customer wants to add another item to the order, you can click **Add Item** on the **Store Pickup Request** page. In this case, you are redirected to the main SCIS screen. Here, you can see the items that the customer paid for online. These items are omitted from the subtotal amount. Only the new items added to this order are included in the order summary and the receipt.

## Entering Quotes in SCIS

Some businesses provide an estimate or quote for specific products a customer wants to buy. As a sales associate, you can create a quote based on items and discounts in the cart, and then print or email it to the customer. After a customer reviews a quote, you can make changes as needed, and then convert the quote to a sales order or cash sale.

As a sales associate, your work flow will likely include the following tasks with quotes:

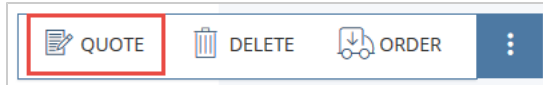
- [Creating a Quote](#)
- [Finding a Quote](#)
- [Converting a Quote into an Order](#)
- [Removing a Promotion from a Quote](#)

## Creating a Quote

After you create a quote, you can open the quote again to make changes. You can print the quote or send the quote to the customer in an email message.

## To create a quote:

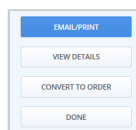
1. Select a customer.
2. Add items to the order.
3. Click **Quote** in the menu below the transaction summary.



4. Enter information in the **Quotes** window. The fields displayed in the popup window are defined by your account administrator. Note that the fields displayed in your implementation of SCIS may be different from the screenshot below.

5. Click **Add**.
6. Click **Save** to save the quote.

After you save the quote, you can perform the following actions:



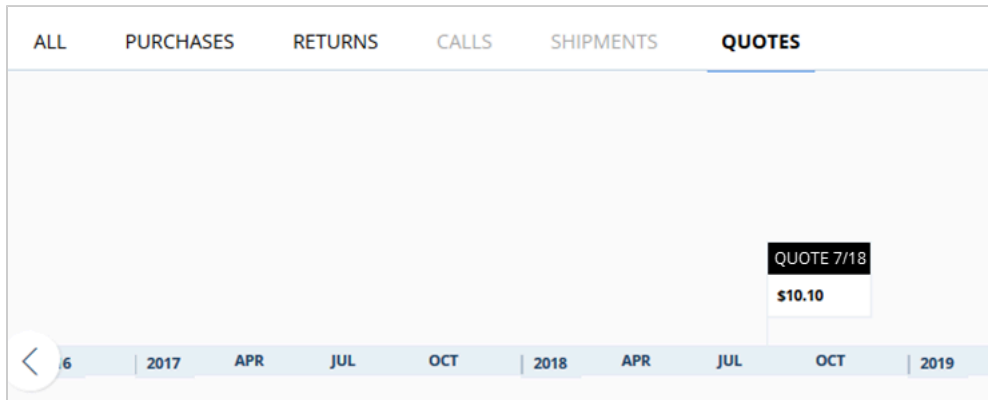
- Click **Email/Print** to email the quote to the customer or print it.
- Click **View Details** to open the Quote window, and view information saved on the quote, such as expiration date and notes.
- Click **Convert To Order** to turn the quote into a sales transaction.
- Click **Done** to save the quote again.

## Finding a Quote

As a sales associate, you can find a quote that you entered yourself, and quotes entered by colleagues. There are three ways to search in SCIS for an existing quote:

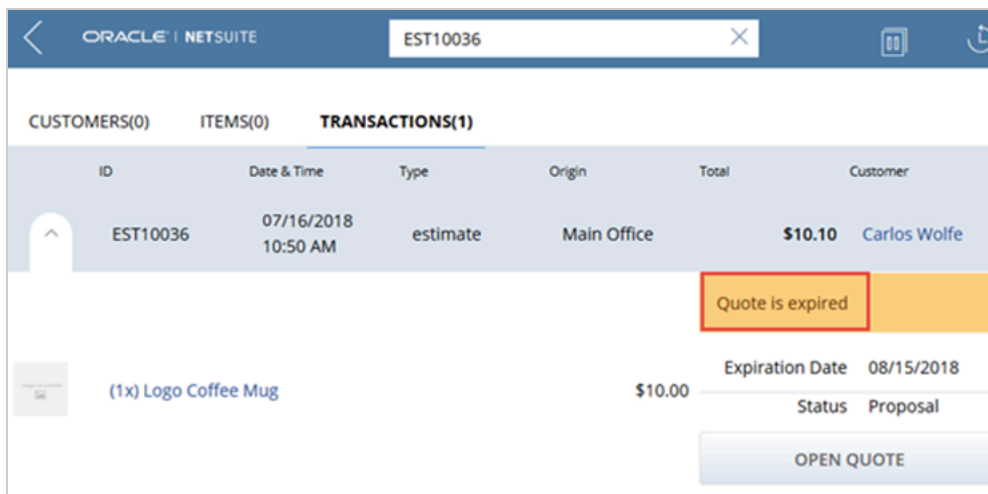
- Scan the transaction number on a receipt.
- Type the transaction number in the search box.
- Type the customer's name in the search box, and then open the Customer Profile.

In the **Customer Profile**, quotes are displayed on the Quotes subtab. Click on the quote in the timeline to open it.



If the expiration date of the quote is in the past, you can still open the quote, modify it, change the date, and save it again if needed. Alternately, you can convert the quote to an order.

Expired quotes are displayed in search results. Expand the line in search results to see the expiration message highlighted in yellow.



## Converting a Quote into an Order

To turn a quote into a sales transaction, open the quote, and then click **Convert to Order**. You can also add the customer's address and make arrangements to ship the order. After you convert the quote to an order, select a payment method, and then submit the order.

### To convert a quote into an order:

1. Find the quote. For more information, read [Finding a Quote](#).
2. Open the quote.

**Note:** If you had any items in the cart for the customer, those items are removed from the cart when you open the quote.

3. After the quote is open, you can make changes by adding or removing items, or adding or removing discounts.
4. After the customer agrees to place the order, click **Convert to Order**.
5. Select a payment method.

6. Submit the order.

## Removing a Promotion from a Quote

You can remove a promotion from a quote, but you cannot remove a promotion after the quote has been converted to an order.

### To remove a promotion from a quote before it is converted to an order:

1. Open the quote that has a promotion applied.
2. Remove the Promotion.
3. Save the Quote.
4. Convert the quote to an Order.
5. Finish the transaction.

## Discounts and Markups in SCIS

Using SuiteCommerce InStore (SCIS), you can apply discounts to a specific item or to the whole order. Discounts can be a specific amount, or they can be a percent discount. To apply a discount to a line-item, click the item price in the cart. To apply a discount to the order subtotal, click the subtotal amount in the Transaction Summary.

Alternately, store managers and sales associates can override the subtotal of an order. The price override capability allows you to increase the amount of the order.

## Applying Discounts

In SCIS, you can apply a discount to a line-item in the cart, or to the subtotal of an order. You have the choice of applying a custom discount, or a predefined discount. A custom discount is a discount amount that is not already defined. You set the rate for a custom discount. Alternatively, you can choose a predefined discount from a list.

### To apply a discount to an item in the cart:

1. Add items to a transaction as described in [Adding Items to a Sales Transaction in SCIS](#)
2. Click the price of the item in the cart. The **Select Discount** window appears.
3. Choose one of the predefined discounts, or click **Custom Discount**.  
If you choose to add a custom discount, enter the discount as a percentage, flat rate discount, or enter a new price for the item. Then choose one of the predefined reasons for the custom discount. If you choose custom reason, enter the reason in the text box.
4. Click **Apply**.

The discount appears in red below the item total. If you apply a custom discount, the reason for giving the discount is also displayed. To apply a discount to the entire order, click the **Subtotal** of the transaction in the Transaction Summary. Follow Steps 3- 4 as described above.

## Applying a Markup or Price Override

In SCIS, click on the amount in the line-item in the cart or the order subtotal. Then use the custom discount user interface to change the amount.

## To apply price override on an order

1. Click the price in the line-item in the cart, or the order subtotal.

SUBTOTAL	\$70.00
TAX	\$0.00
TOTAL	\$70.00
AMOUNT DUE	\$70.00

2. In the **Select Discount** window, click **Custom Discount**.
3. Click the equal sign, and then enter the new price. You can enter a custom reason, if a reason for price override is not already defined.

**Select Discount**

Total Markup \$5.00 After Discount **\$75.00**

**Select rate**

-% - =

75

**Select reason**

☐ Regular customer

☐ Other

☒ Price Override

APPLY CANCEL BACK

4. Click **Apply**.

After you apply a markup, the tax amount, total amount, and amount due are updated according to the markup.

**Note:** When marking up the price of a line-item in the cart, you cannot mark up the price more than the 100% of the existing price. For example, on an item that costs 70.00, you cannot set the markup to 141.00. However, you can mark up the subtotal on an order more than 100%.

## Applying Promotion Codes to Transactions in SCIS

In SuiteCommerce InStore (SCIS), you can apply a coupon or promotion code to a sales transaction. Click the tag icon in the Transaction Summary pane, and then enter the promotion code. The appropriate discount is automatically subtracted from the subtotal, and the coupon code is displayed in the transaction summary.

An administrator must first configure promotions in NetSuite, before sales associates can start using them in SCIS. The basic procedure for applying a promotion is the same, no matter which type of promotion you are working with.

**Note:** Stackable Promotions, and Auto-Apply Promotions are available only if the administrator has enabled SuitePromotions.

Read the following topics to learn more about using different types of promotions in SCIS:

- [Basic Procedure for Applying a Promotion in SCIS](#)
- [Working with Stackable Promotions in SCIS](#)
- [Working with Auto-Apply Promotions in SCIS](#)
- [Working with Auto-Apply and Stackable Promotions in SCIS](#)

## Basic Procedure for Applying a Promotion in SCIS

Use the following steps to add any type of promotion to orders in SCIS.

### To apply a promotion code in SCIS:

1. Add items to a transaction as described in [Adding Items to a Sales Transaction in SCIS](#)
2. Click the tag icon in the Transaction Summary pane.



3. Enter or scan the coupon code.

 A screenshot of the Promotions dialog box. It has a title bar with a close button. Inside, there is a text input field containing "10%OFF" and a blue "ADD" button to its right. Below the input field, the text "ITEMPROMO" is displayed. At the bottom of the dialog is a blue "DONE" button.

4. Click **Submit**.

## Working with Stackable Promotions in SCIS

With stackable promotions, you can add more than one coupon code to an order. You can add any combination of item promotions and order promotions to a sales transaction. An **item promotion** applies to a specific item. An **order promotions** applies to the total amount of a sales transaction.

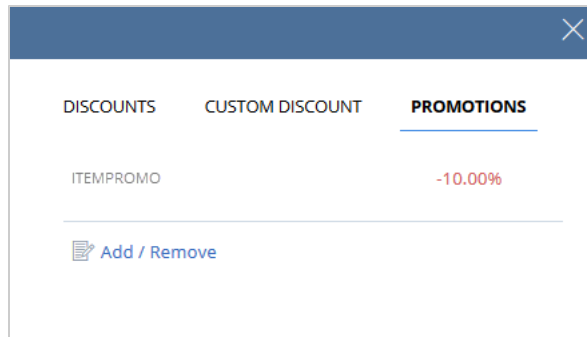
An administrator must define which promotions can be stacked and promotions which are exclusive and cannot be combined with other promotions. If you make a mistake, you can remove coupon codes that were applied in error.

### To apply stackable promotions in SCIS:

1. Add items to the cart.

2. Click the price tag icon in the main SCIS screen.
3. Enter or scan a coupon code in the popup.

The promotion can be applied either to the item in the cart, or it can be applied to the subtotal of the sales transaction. The way in which a coupon code is applied depends on how the administrator has configured promotions in the system. You can click the item price or the order subtotal, and then click the **Promotions** subtab in the popup window to see the promotion applied.



4. You can click **Add/Remove** to update the promotions applied to the order.

You can stack order promotions on top of item promotions, or you can add multiple coupon codes to the whole order. When you have finished building the order, apply payment, and then submit the order.

## Working with Auto-Apply Promotions in SCIS

Promotions can be automatically applied to an order without the need to research which items are eligible for promotions. If the administrator has configured Auto-Apply promotions in the system, then a promotion-related discount is applied to the sales transaction immediately when an eligible item is added to the cart. The system determines which promotions are applicable to a transaction.

**Note:** Up to 30 active promotions can be added to a transaction for a specific date range per location. You can add more promotions manually if the transaction is eligible.

## Adding a Free Gift Promotion to the Cart

An administrator can set up a store promotion where customers automatically receive a free item along with the purchase of a another item. The free item is applied when you select a payment option.

### To add a free gift to the cart:

1. Add an item to the cart.  
Free gift promotions are created in the system by an administrator. Typically, the administrator sets up a free gift promotion and chooses which items will be free gifts.
2. Select a payment option.
3. The **Accept Free Gifts** popup window displays.
  - a. Choose the free gift.
  - b. Click or touch, **Continue to Payment** to close the window. If you don't want to add the free gift, then click **Close**.
4. In the cart, select a payment option, and complete the order.


If the item associated with the free gift promotion is removed from the order, then you are prompted to remove the free gift. If increasing the quantity of items in the cart triggers more free gifts, then the **Accept Free Gifts** popup window displays again, and you can select more free gifts.

## Working with Auto-Apply and Stackable Promotions in SCIS

The best offer logic automatically applies the promotion or promotions that provide the greatest discount to the customer. This means several promotions can be automatically stacked on a transaction.

### To use auto-apply promotions with stackable promotions in SCIS:

1. Add items to the cart. Auto-Apply promotions are applied immediately after items are added to the cart.
2. To enter additional stackable promotions, click the price tag icon in the main SCIS screen.
3. Enter a coupon code in the popup window. Eligible promotions impact the discount amount on the order.

 **Note:** You can remove stackable promotions from a sales transaction, but you **cannot** remove auto-apply promotions.

When you have finished building the sales transaction, apply payment, and then submit.

## Working with Gift Cards in SCIS

You can sell gift cards with SuiteCommerce InStore (SCIS). Gift cards are added to a transaction and paid for like other items. Gift cards can be redeemed later. You can sell a physical, plastic gift card, or a digital gift certificate (where the gift recipient receives an email that includes a gift message and the gift card authorization code).

See [Paying with a Gift Card](#) for more information on using a gift card as payment on a transaction.

### To sell a gift card:

1. Use the search bar or the QuickAdd bar to find the gift card item in SCIS.
2. Click **Add**, to add it to the order.
3. Swipe the gift card in a card reader to record the authorization code.
4. Click **Add**.

The gift card appears in the transaction list. Customers can pay for the gift card like any other item. For more information, see [Accepting Payments for Purchases in SCIS](#).

### To sell a digital gift certificate:

1. Use the search bar or the QuickAdd bar to find the digital gift card item in SCIS.
2. Click **Add**, to add it to the order.
3. Enter the gift certificate amount.
4. Click **Next**.
5. Enter the following information:
  - **From** – the person sending the gift certificate.
  - **Recipient Name** – the name of the person receiving the gift certificate.
  - **Recipient Email** – the email address of the recipient.



- **Auth Code** – the authentication code of the gift certificate. This code may be automatically generated by SuiteCommerce InStore, depending on system configuration. You can use this code to search for the gift certificate after it is sold.
- **Message** – (Optional) Add a message that appears on the digital gift certificate.

6. Click **Add**.

The gift certificate appears in the transaction list. Customers can pay for the gift certificate like any other item.

After purchase, an email message is sent to the recipient of the digital gift certificate. The email message includes the authorization code and the gift message (if a gift message was entered). The authorization code is also printed on the receipt.

## Processing Returns in SCIS

The method used to process a return in SuiteCommerce InStore (SCIS) depends on whether information about the original sales transaction is available. Make a **validated** return when the customer presents a receipt as proof-of-purchase or you have a record of the original sales transaction in SCIS. Make an **unvalidated** return when the customer does not have a receipt and SCIS does not have a record of the purchase.

To return a serial or lot numbered item, you must use the validated return process.

Read the following topics for more information:

- [Validated Returns](#)
- [Unvalidated Returns](#)
- [Returning Lot Numbered Items and Serialized Items](#)

[Watch a Related Video](#)

## Validated Returns

In a validated return, the sales associate can verify the details of a purchase by reviewing the original transaction. It allows you to authenticate that the purchase was made through your retailer before issuing a refund. Validated returns can reduce fraud and mistakes.

When processing a validated return, you need a record of the original transaction from when the customer purchased the item. The first step is to scan the receipt or use another method to open the transaction details. Customers can return one or more items from a single transaction.

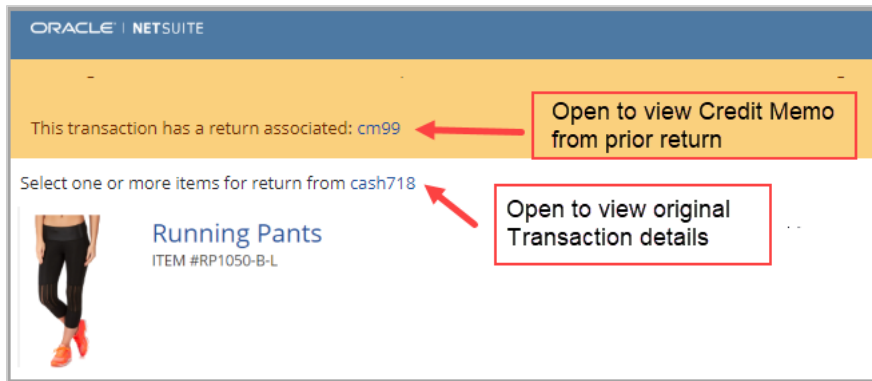
## Verifying Transaction Details for a Validated Return

You can find the transaction by:

- Scanning the customer's copy of the receipt.
- Entering the transaction ID from the receipt into the Search Bar.
- Searching for the customer and reviewing their Customer Profile timeline.
- Reviewing the Transaction History list.

While performing the return, you can view details from the Returns page by:

- Opening the transaction link.
- Opening any credit memo links from previous returns of the transaction.



### To process a validated return:

1. Find the original purchase transaction in SCIS.
2. Touch or click **Return** to add the item to the cart and initiate the return process.

This example shows a return started from the Transaction History.

ID	Type	Customer	Amount		
CASH10079	cashsale	Default Customer (Sofia Jones)	\$20.20	RECEIPT	RETURN
CASH10078	cashsale	Jenny Smith	\$303.00	RECEIPT	RETURN

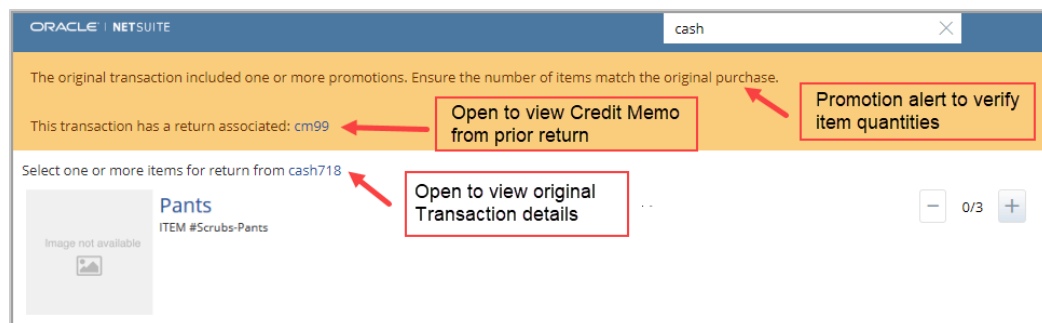
3. Review the top of the returns page for any alerts or credit memos from previous returns.

**Important:** If the original transaction included a **promotion**, SCIS cannot verify the **item quantity** originally purchased or previously returned.

For example, if a customer bought three hats on promotion, but now wants to return those hats, SCIS will not automatically limit the return of hats to only three. The sales associate must verify the eligible quantities before proceeding with the return.


The original transaction included one or more promotions. Ensure the number of items match the original purchase.

If SCIS cannot verify the original quantity purchased, an alert message displays at the top. You should manually verify the quantity eligible for return. See [Verifying Transaction Details for a Validated Return](#).



4. Choose the items and quantities to return by adjusting the return quantity for those items.
- Touch or click the **+** or **-** button. The first number is the quantity of this item to be returned, the second is the quantity eligible for return.

Select one or more items for return from CASH10078




**Pants**

ITEM #Scrubs-Pants

1/2

5. Select a reason for the return from the drop down list in the right pane. When you check the **Apply reasons individually** box you can select a different reason for return to each line of the return transaction.

Select one or more items for return from CASH10081




**Pants**

ITEM #Scrubs-Pants

Not as expected

1/2

\$300.00



**Pants**

ITEM #Scrubs-Pants

Damaged

1/1

\$150.00

☒ Apply reasons individually.

6. Choose a payment method to refund the customer. All payment methods available to use with returns are displayed in the list. You can use more than one payment method for the customer refund.

RETURNED ITEMS	
SUBTOTAL:	\$300.00
TAX	\$3.00
TOTAL	\$303.00
<hr/>	
REFUND DUE	-\$303.00
<input type="button" value="REFUND CASH"/>	
<input type="button" value="REFUND CREDIT CARD"/>	

For more information on refunds, read [Processing Refunds with SCIS](#).

## Unvalidated Returns

This return type does not require the sales associate to locate the original transaction. It occurs when a receipt or other proof-of-purchase is not available.

You start the return by scanning or adding the returned item to determine the refund amount. Customers can return one or more items from an order.

### To process a return without a receipt:

1. Add the item to the order.
2. Touch or click the line Item action menu, and then select **Return**.

	Qty	Price	Total
Pants-Medium-Green	1	\$150.00	\$150.00
<div> NOTE RETURN </div>			

3. The order line shows a return is in progress. Select a reason for return.

	Qty	Price	Total
PANTS-MEDIUM-GREEN	1	\$150.00	\$150.00
<div> RETURNED </div>			
<div> COLOR: GREEN, SIZE: MEDIUM <div> Damaged </div> </div>			

4. Choose a payment method to refund the customer.

## Returning Lot Numbered Items and Serialized Items

When returning a lot numbered item or serialized item, you must first find the existing purchase transaction, and then process a validated return. For more information, read [Validated Returns](#).

**Note:** Unvalidated returns are not supported for lot numbered and serialized items.

## Processing an Exchange in SCIS

Rather than receive a cash/credit card refund or credit memo, a customer can request to exchange the return item for another item. The item can be the same or different from the original item. Processing an exchange requires creating a return transaction and then adding the exchange item to the cart.

### To perform an exchange transaction:

1. Start by creating a return transaction. For more information, see [Returning an Item](#).
2. Add the exchange item to the return transaction. You can add the same item as the one being returned.

For example, a customer may want a different size or color of the same item they originally purchased. In this case, find the correct size and color, and add the item to the cart.

**Important:** Sales associates cannot perform exchanges that include an item for **shipping** or **pickup**.  
For example, the customer cannot exchange an item already purchased for an item that will be shipped or picked up in-store. Instead, the associate must first complete a return transaction and then enter a sales transaction for the shipping or pickup item.

3. Note the following information about how the balance due is determined for exchanges:

- If the total of the exchange **is more** than the total of the return, then a balance is due.
- If the total of the exchange **is equal** to the total amount of the return transaction, then no balance or refund is due.
- If the total of the exchange **is less** than the total amount of the return, then a refund is due.

If no balance or refund is due, the associate can tap **End Transaction** to finalize the exchange.

4. Give the receipt to the customer.

## Processing Refunds with SCIS

You can use any payment method available in SCIS for providing a refund while processing a return. The following are most common:

### ■ Refund cash or credit card

If you choose to refund cash or a credit card, then the refund is processed similar to a sales transaction. You can refund the customer from the cash drawer. If the original payment was made with only one credit card, then you can process the return without swiping the card.

### ■ Split Tender Refund

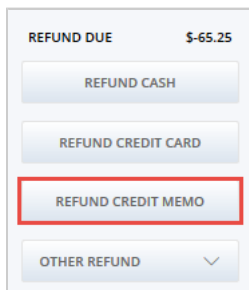
You can split a refund amount across multiple payment types. For example, if the total amount of the return order is \$100. You can refund \$25 in cash and \$75 to a credit card.

Sales associates can only process a referenced refund when the original sales transaction has **one** credit/debit card payment method. After the payment is approved, the payment provider sets a PNREF to it. When the refund takes place, SCIS uses the PNREF to send the refund directly to the credit/debit account. In this case, the sales associate is not required to use the payment device to complete the refund.

**Note:** If the original payment was submitted with more than one credit/debit card, then to process the refund, the sales associate must use the payment device to swipe or enter each card associated with the original payment and select the amounts to be refunded.

### ■ Refund credit memo

If you choose to provide a credit memo as a refund, click **Refund Credit Memo**



A credit memo can be issued during a return transaction. Customers can use credit memos as store credit the next time they come to the store or shop online.

The Credit Memo number shows on the receipt. When the customer wants to use the credit memo as payment on a future purchase, you can find the Credit memo by typing in the number. For more information, see [Working with Credit Memos in SCIS](#).


**ORACLE | NETSUITE**

Store Manager  
SoMa - San Francisco, #100  
401 11th Street  
San Francisco CA 94103  
United States

415 555-1000

**CreditMemo #: 22**

Operation: Return  
Sales Assoc.: John B Wolfe  
Customer: April Rodriguez

 (1x) Running Pants -80.00

Returned Items Subtotal	-80.00
Returned Items Discount	0.00
Returned Tax	-5.25
	0.00
<b>Returned Item TOTAL</b>	<b>-85.25</b>
Subtotal	0.00
Discount	0.00
Tax	0.00
Handling Cost	0.00
Shipping Cost	0.00
<b>Total</b>	<b>-85.25</b>

**TOTAL \$-65.25**

## Processing Refund

The following steps describe how to process returns with SCIS.

### To process a refund:

1. Select how you want to refund the customer:
  - Refund cash
  - Refund credit card
  - Refund credit memo
  - Other Refund
2. Refund the customer:
  - Refund cash – Open the cash drawer, and then refund cash.
  - Refund credit card:
    - If the original transaction was paid with **one** credit card – There is no need to swipe the card to refund the customer.
    - If the original transaction was paid with more than one credit card – Swipe each card to refund the amount paid by each card.
  - Refund credit memo – Print the receipt. The number for the credit memo is printed on the receipt. The customer can come back and use it for store credit.
  - Other Refund – Your system administrator may have set up other methods for refunding the customer. Contact your manager or system administrator for more information.

**Note:** If you overcharge the customer, for example, the customer did not receive the discount they were entitled to, you cannot refund only the discount amount in SCIS. You must refund the entire amount of the original transaction, and then create a new sales transaction for the correct amount.

## Refunding a Partially Paid Transaction

If the customer makes a partial payment on an order, and then decides not to complete the order, the sales associate must perform a refund transaction. Cancelling the partially paid transaction is not supported in SCIS.

### To refund a partially paid transaction:

1. Finish the sale using cash as the payment method. If the customer made the partial payment with a credit card, then complete the transaction with partial payment from the credit card, and the balance in cash.
2. Make the refund of the sale. On the refund, create the same type of transaction as in Step 1. Create a partial refund with cash and, the amount on the credit card from the original sale.
3. Refund the customer's credit card for the amount charged to the credit card from the original sale.

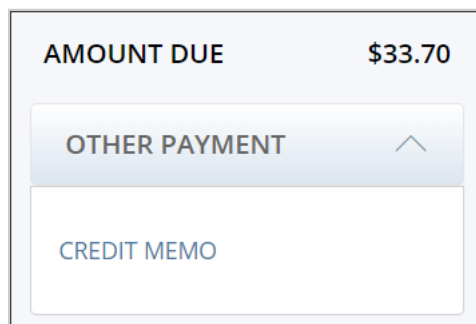
## Working with Credit Memos in SCIS

In SuiteCommerce InStore (SCIS), a credit memo can be applied as payment. If the customer was refunded with a credit memo, the credit memo number is displayed on the receipt from the return transaction. You can apply that credit memo to the customer's next purchase. Search for the customer in SCIS, and then retrieve the return transaction from the Customer Profile.

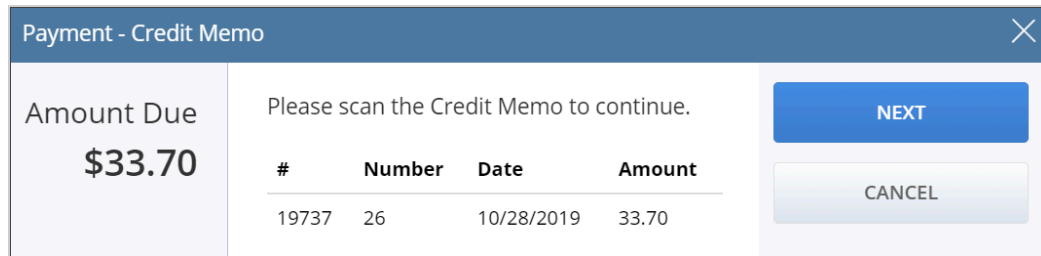
**Note:** It is not possible to issue a credit memo without a customer defined on the transaction.

### To apply a credit memo as payment:

1. Add the customer to an order.
2. Add items to the order.
3. Click **Other Payment**, and then click **Credit Memo**. Available credit memos display in a list.



4. Choose the credit memo to apply to the order.



The dialog box titled "Payment - Credit Memo" has a close button (X) in the top right corner. On the left, it displays "Amount Due \$33.70". In the center, it says "Please scan the Credit Memo to continue." Below this is a table with four columns: #, Number, Date, and Amount. The table contains one row with the values 19737, 26, 10/28/2019, and 33.70. On the right, there are two buttons: a blue "NEXT" button and a light blue "CANCEL" button.

#	Number	Date	Amount
19737	26	10/28/2019	33.70

5. Click **Next**.
6. Click **Apply**.
7. The amount of the credit memo shows in the transaction summary as a credit.
8. Click the appropriate payment method for any outstanding amount.
9. Give the receipt to the customer.

## Limitations when Applying Credit Memos

Sales associates cannot accept a Credit Memo as payment for any transaction that generates a sales order. Sales orders are created in NetSuite for SCIS sales transactions that have items for shipping, or pick up in-store. If a sales associate attempts to apply a credit memo as a payment on a transaction where it is not supported, SCIS displays an error message. They will not be allowed to proceed until a different payment method is selected.

## Viewing a Sales Report in SCIS

With SuiteCommerce InStore (SCIS) sales associates can view a report to track sales. A sales report is displayed as a graph and an itemized list showing total sales for a date range or category.

A sales report contains the following information:

- **Net Sales** – Displays the total sales for the period specified. Sales for a single day are displayed as a bar graph. Sales for a long range are displayed as a line graph.
- **Sales by Class** – Displays the sales for each item type.
- **Retail Tenders** – Displays sales information based on the type of payment received from the customer. Credit card sales information is split among each type of credit card.

### To view a sales report:

1. Log in to SuiteCommerce InStore.
2. Click the User Menu.
3. Select **Sales Report**.
4. Select the period for which you want to generate a sales report from the dropdown list. The following default values are available:
  - Today
  - Yesterday
  - Week to date
  - Last 7 Days



- Month to date
- Last 30 days

## Viewing a Saved Search in the SCIS User Menu

As a sales associate, you can access saved searches from the User Menu. These are searches created by your account administrator to show important information that may be useful to complete your daily tasks.

### To view saved searches:

1. Click the **User Menu**.
2. Click **Saved Searches**.
3. Click on a Saved Search in the list.

You can sort the search results by clicking a column header. You can also click links in search results to drill down to see more information about a customer, item, or transaction.

## Printing Receipts from the Transaction History

Use the Transaction History to print receipts for various transactions entered in SuiteCommerce InStore (SCIS), as well as initiate Return transactions.

### To view the Transaction History:

1. Log in to SCIS.
2. Touch or click, click the clock icon at the top of the screen.
3. Use the filters at the top of the page to refine search results.


ID	Type	Customer	Day, Time	Amount		
183	cashsale	Default Customer (Johnny B Goode, HEADQUARTERS : AMERICAS : Generation N US)	5/23/2019 11:18 am	\$104.39	RECEIPT	RETURN
22	creditmemo	April Rodriguez	4/18/2019 1:00 pm	\$-65.25	RECEIPT	RETURN
0901	invoice	April Rodriguez	4/18/2019 12:26 pm	\$98.95	RECEIPT	RETURN

- **Mine, All** – Select **Mine** to show transactions submitted for the customers that you worked with. Select **All** to show all transactions submitted within a certain date range.
  - **Date filters** - Select the date range for the transactions you want to view.
4. View the list of transactions, print a receipt, or initiate a return transaction. The Transaction History shows the following information:
    - **Transaction ID**
    - **Transaction Type** – Quotes, returns, and purchase transactions are displayed on the SCIS Transaction Detail list.
    - **Customer** – Click the link to show the customer's profile in SCIS.
    - **Date of the transaction**

- **Amount** – Shows the grand total for the transaction.
- **Receipt button** – Click the button to print the transaction receipt.
- **Return button** – Click the button to initiate a return transaction. For more information on returns, read [Processing Returns in SCIS](#).

# Working with Customer Profile Information

You can add a new customer or edit the customer profile in SuiteCommerce InStore (SCIS). The Customer Profile in SCIS, enables you to view customer information together with purchase history. It includes basic contact information including name, street address, and email address.

 **Note:** When operating in Fallback, you cannot create, edit, or view customer information. However, you can assign a customer to an order. For more information, read [Assign a Customer to an Order in Fallback](#).

For more information, read the following:

- [Adding Customers To Sales Transactions in SCIS](#)
- [Updating a Customer Record in SCIS](#)
- [Viewing the Customer Profile](#)
- [Adding Customer Notes in SCIS](#)
- [Customer Timeline](#)
- [Customer Statistics](#)

## Adding Customers To Sales Transactions in SCIS

In SuiteCommerce InStore (SCIS), you can add an existing customer to an order, or enter a new customer while building an order. To do this, click the Add Customer link in the cart, and then start typing the customer's name. If there is a match in the system, the customer name is displayed. You can select the customer to add them to the order. If there is no match, or you do not see the customer name you want to use, click the link to add new customer information.

### Adding an existing customer to a transaction:

1. In the SCIS shopping cart, click **Add Customer**.
2. Enter the name of an existing customer. If there is a match in the system, you can select the customer you want to add to the order.  
To remove the customer on the order, touch or click the **X**.
3. (Optional) Click **New Customer** to enter information to create a new customer in the system. The **Add New Customer** dialog window appears.
  - a. Decide whether the customer should be recorded as an **Individual** or as a **Company**.
  - b. Click the **Required**, then enter the customer information as necessary.
  - c. (Optional) Click the **Optional**, then enter information as necessary.
4. Click **Create and Add** to save the new customer information and add the customer to the transaction in the cart.

## Creating a Customer Record in SCIS

You can create a customer record in SuiteCommerce InStore (SCIS) from the Customers list. Note that any changes you make in SCIS are also recorded in NetSuite.

In SuiteCommerce InStore (SCIS), you have the can search for the customer's name by typing a few letters of their first or last name in the search bar. Click Add to Order, and then you can start adding items to the

cart. If the customer does not already exist in the system, and he or she does not want to provide contact information, you can skip this step and start adding items to the order.

### To create a customer:

1. Type some letters or numbers in the search bar that may or may not return a customer in search results.
2. Click **Add New Customer**.
3. The new Customer dialog appears.
  - a. If the customer is an individual customer, click **Individual**. Click **Company** if the customer is a company.
  - b. Click the **Required** tab, then enter the customer information as necessary.
  - c. Click the **Optional** tab, then enter information as necessary.
4. Click **Save**.

## Updating a Customer Record in SCIS

You can update a customer record in SuiteCommerce InStore (SCIS) by editing the Customer Profile. Note that any changes you make in SCIS are also recorded in NetSuite.

### To update customer information:

1. Search for the customer whose data you want to view.
  - a. In the search bar, type the first few letters of the customer's name.
  - b. Click the **Customers** list to view the customer search results.
2. Click the customer name. The customer profile displays.
3. Click **Edit Profile**.
4. Edit the customer information as required.
5. Click **Save** to save the customer profile. SuiteCommerce InStore displays the updated customer profile and updates the customer record in NetSuite.

## Viewing the Customer Profile

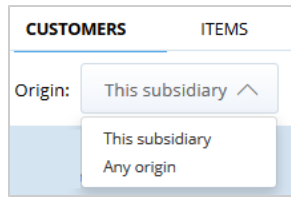
The Customer Profile in SuiteCommerce InStore (SCIS) enables you to view a customer's contact information, including address and email. It also displays a customer's purchase history.

## Multi-Subsidiary Customers

The store where you work may do business in multiple regions or subsidiaries. You may work with customers who have purchased items from a store location in a different region, using a different currency. You can still view the customer's profile as well as their transactions from any subsidiary. You can also enter orders for these customers.

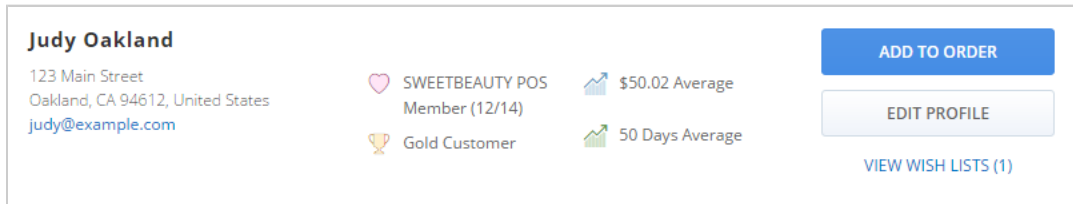
### To view the Customer Profile:

1. Use the search bar to find a customer.
2. (Optional) Use the **Origin** list to find customers who may be assigned to a subsidiary different from your own.



3. Click the customer name. The customer profile is displayed.

Basic customer information appears as shown in the following screenshot. Not all of this information may be defined for each customer. Click **Edit Profile** to add or edit information.



This area displays the following information about a customer or company:

- **Name** displays the first and last name of the customer. In a company profile, only the company name is displayed.
- **Address:** displays the customers address. This can be a street name and number, post office box, etc.
- **City, state, postal code, and country:** displays the information defined in the customer's profile.
- **Email:** displays the email address of the customer. This is the address used to communicate with a customer and send transaction receipts.
- **Membership date:** displays the date the customer's profile was created.
- **Average transaction amount:** displays the average amount the customer spends during each transaction.
- **Average time between transactions:** displays the average time between each customer's transaction.
- **Add to Order:** Click to add this customer to the current transaction.
- **Edit Profile:** Click to edit the customer's profile.

## Adding Customer Notes in SCIS

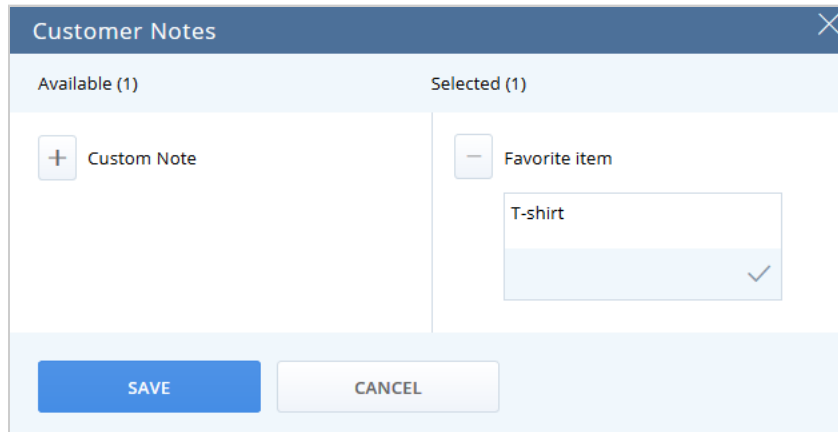
You can add a note to a customer profile in SuiteCommerce InStore (SCIS). For example, you may want to add a note about the customer's product preferences. The notes you add to customer profiles are also attached to the customer record in the system and are available for administrators to view.

### To add a note to a customer profile:

1. Touch or click View Notes in the customer profile. A screen pops up where you can select a preset note.



2. Select a note type.
3. Add more information if needed.



The 'Customer Notes' dialog box is shown with a dark blue header and a close button. It is divided into two panes: 'Available (1)' on the left and 'Selected (1)' on the right. The 'Available' pane contains a single item, 'Custom Note', with a plus icon. The 'Selected' pane contains a single item, 'Favorite item', with a minus icon. Below the 'Favorite item' is a text input field containing 'T-shirt' and a checkmark icon. At the bottom of the dialog are two buttons: 'SAVE' (blue) and 'CANCEL' (light blue).

4. Click Save.

After you have added a note to the customer profile, a red circle appears on the note icon. If you see this, then you know that a note has already been entered for that customer. You can click on the icon to view or edit the note. You can also add another note.

## Customer Timeline

In the Customer profile in SuiteCommerce InStore (SCIS), you can view a timeline of the customer's activity. This timeline displays a customer's purchases, returns, and support calls.

**Note:** Customer activity only appears when a customer has previous purchases. If a customer has no previous purchase, customer activity is not displayed.

### To view the customer timeline:

1. Use the search bar to find a customer.
2. Click the customer name. The customer profile displays.
3. To view details about customer activity, click the area you are interested in.



SCIS may group events together. Click the group of events to view a detailed list of the events. From this list, you can select an individual event to view the receipt and more details.

The customer activity timeline displays the following types of events:

- **All** – Displays all customer data.

- **Purchases** – Shows transactions performed by the customer.
- **Returns** – Shows returns performed by the customer.
- **Calls** – Shows support calls submitted or received by the customer.
- **Shipments** – Shows shipments to the customer.
- **Quotes** – Shows estimates or quotes entered in SCIS for the customer.
- **Shipments** – Shows shipments sent to the customer.

You can also filter the customer activity timeline by performing the following:

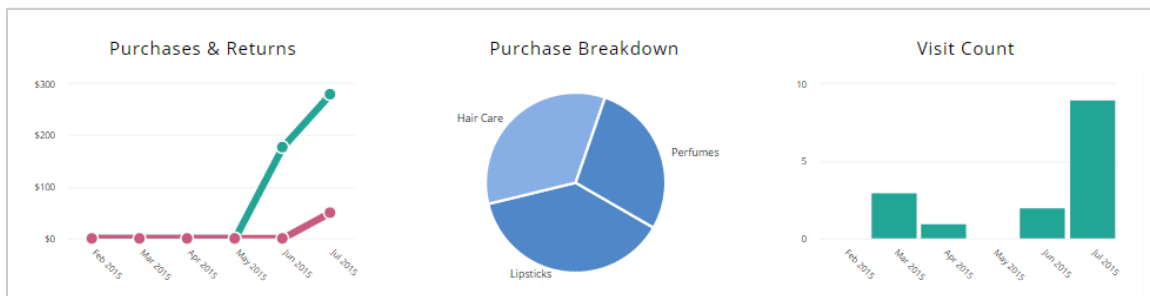
- Select one of the tabs to restrict the types of events displayed on the timeline.
- Zoom in and out of the timeline using the zoom icons.
- Navigate chronologically through the timeline using the left and right arrows.

## Customer Statistics

SuiteCommerce InStore enables sales associates to view information about a customer to better understand a customer's needs and enhance upsell possibilities.

**Note:** Customer statistics only appear when a customer has previous purchases.

The customer statistics area displays information about a customer's previous purchases in graphical form. The following screenshot shows an example of how this information appears in the customer profile.



This information is divided into the following graphs and charts:

- Purchase and Returns
- Visit Count
- Purchases Breakdown