NetSuite Point of Sale User Guide
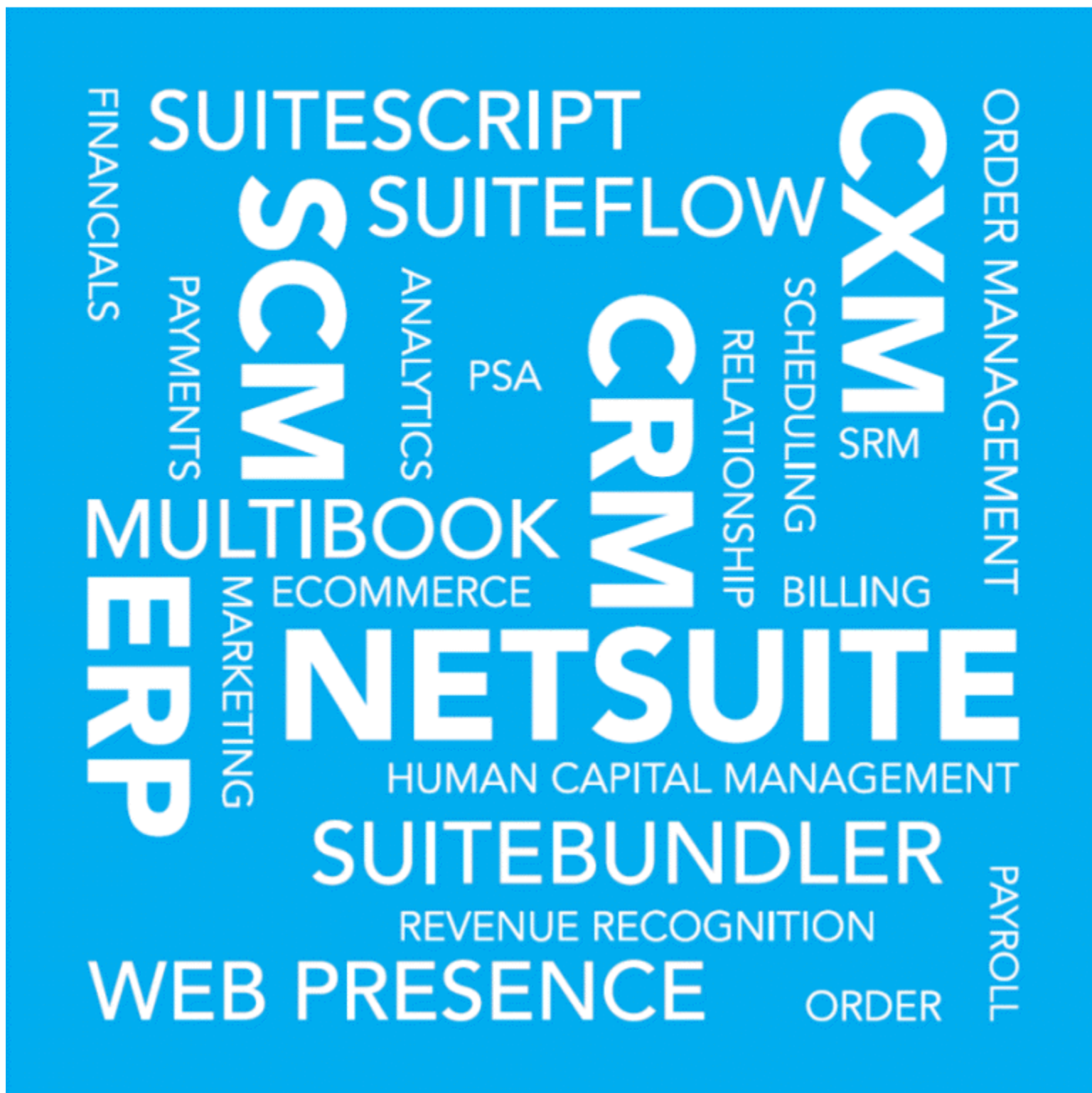
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NetSuite Point of Sale Overview

ⓘ **Applies to:** NetSuite Point of Sale (NSPOS)

▶ Watch a Related Video

NetSuite Point of Sale (NSPOS or POS) is the in-store register component of the SuiteCommerce product line. Designed for midsize retailers, NSPOS provides an efficient and customizable interface for handling sales transactions and working with customer and item information. It is a high-performance, full-featured solution that can scale to meet demands as retailers increase their sales volume and expand to new locations.

NSPOS works on many register types, and provides a quick and accurate check-out process. Because it is highly customizable, you can modify the workflow and appearance to meet the business requirements of most store locations. It can work with peripheral equipment such as barcode scanners, a mouse and keyboard, or the sales associate can use on-screen features such as dynamic item lookup, a tap screen interface and a virtual keyboard. Most setups include a receipt printer and credit card swipe device.

⚠️ **Important:** The SuiteCommerce line includes another point of sale solution – SuiteCommerce InStore (SCIS). NSPOS runs primarily on desktop cash register setups. SCIS processes transactions using touchscreen tablets or other portable devices. For SCIS documentation, see the SuiteCommerce InStore User Guide under NetSuite Help > User Guides.

NetSuite Point of Sale is available in the United States, Australia, Canada, England, and New Zealand.

Integration

NetSuite POS integrates with the NetSuite application to provide Enterprise Resource Planning (ERP) tools for managing your items, pricing, and other aspects of your business. This occurs through a periodic synchronization process that includes a cloud-based replication server.

Because NetSuite POS receives and sends information periodically rather than in real-time, internet outages do not prevent your sales associates from making sales transactions. Synchronization resumes when your internet connection is restored.

Synchronization Downloads

Sales associates use item, price and promotion data saved to the register when they scan items for sales and make other transactions. This data originates in NetSuite and is pushed to the registers in synchronization downloads. Also called a **down sync**, these downloads ensure your registers have the most current information available. Downloaded content includes:

- Item information
- Pricing
- Promotions
- Customer information
- Employee information
- POS register configuration data

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Synchronization Uploads

Transactions and other entries made at registers periodically upload to NetSuite. Also called an **up sync**, these updates adjust inventory levels for item movement in and out of your stores, log payments, and modify customer information and history. In addition, transactions occurring at a location are distributed to other registers at the same location, ensuring a seamless customer experience while they are visiting your store. Information uploaded from the POS register includes:

- Items sold / returned
- Payment amounts, including taxes
- Payment types
- Customer information

Synchronization Periods

Synchronization between NetSuite and your POS registers occurs periodically, with the default intervals being:

- NetSuite to POS every 15 minutes
- POS to NetSuite every 5 minutes

Synchronization usually completes within a few minutes, but can be influenced by factors such as the amount of data transferred or the connection speed. If you do not see your data immediately, try checking back later. NetSuite Technical Support is available for questions or concerns.

Third-Party Payment Gateways

Each POS register is connected to a payment gateway. These are third-party applications selected by retail businesses to handle credit or debit card authorizations and other payment types that require special handling.

When you enter or the customer swipes a credit card as payment, your POS connects with the payment gateway and sends the credit card, purchase amount and other information. The gateway processes the payment and returns an authorization stating that the payment is accepted.

Roles and Permissions

Sales associates are granted permissions using assigned roles set up in the NetSuite application. These roles are linked to the sales associate's sign on. Each role provides a basic set of permissions for operations that are typical for retail transactions, such as such as entering sales, voiding lines, taking returns and applying discounts. Managers are assigned roles with greater permissions, allowing overrides and other high-level functions not available to sales associates. Your manager can work with the system administrator to adjust role-based permissions as needed.

Passwords

Signing in to a register to begin a shift requires entering a User ID and Password. NetSuite POS uses the Payment Application Data Security Standards (PA-DSS) to determine requirements for setting and maintaining passwords. Your system administrator sets up your password and is responsible for

ensuring updates occur per your store's policies. If you forget your password or believe it should be reset, please contact your manager or system administrator.

> **ℹ Note:** Sales associate and other non-system administrator passwords **do not expire**. Your system administrator should follow PA-DSS guidelines on passwords to ensure your store is in compliance.

Your logon to the register will lock after five sign-on attempts that fail due to entering an incorrect password. Your system administrator can unlock your account.

Access to Customer Profiles

A key feature of NetSuite POS is quick access to customer contact information and purchasing history. This history includes returns as well as purchases, and can be used to up-sell a customer by suggesting items that match their purchasing trends. See Work with Customer Information. To view a customer's past five transactions, double-click or tap the customer's name. Tap anywhere on-screen to return to the transaction.

Sales Associate Workflow

The following outlines a typical workflow for starting your day and performing sales transactions in NetSuite POS. Use the links provided to read about a process in more detail.

1. **Start the NetSuite POS application and sign on**

   Your register may already have the application running, but you'll still need to sign on. Your NetSuite POS register may also include a time clock feature you and your associates can use to clock in and out. See Sign On and Off your Register.

2. **Select a or add a customer**

   This optional step provides a benefit to the customer by storing their purchase history and contact information for use in recommendations and alerts to promotions that meet their interests. It provides a benefit to your business by helping you see who your customers are, what they purchase, and what you can do to increase their satisfaction with your services. See Add Customers to a Sales Transaction and Work with Customer Information.

3. **Add items**

   To add items for purchase in a transaction, you can use an attached barcode scanner, use Find Item to search by item name or ID, or use Item Hotkeys your manager has set up for quick selection. See Work with Items in a Sales Transaction.

4. **Apply any special discounts or sales tax adjustments**

   As you scan or select items, active promotions are applied automatically, with discounts displaying on the item's line. However, depending on your store's policies and your NetSuite POS permissions, you may have the ability to add one-time discounts in the form of percent off or dollar off an item or transaction.

   For working with sales taxes, you can adjust rates for tax-exempt organizations and for customers that do business outside the local tax jurisdiction. See Discounts and Sales Taxes.

5. **Accept payment**

   NetSuite POS enables customers to pay using a variety of methods. Common payment types include cash, check, credit card, debit card and gift card/certificate. The payment types accepted by your business depend on your setup and policies. See Accept Payments for Purchases.

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6. **Sign out of NetSuite POS**

   When you complete your work day or are taking a break and no longer entering sales transactions, you should sign out of NetSuite POS. See Sign On and Off your Register.

User Interface

NetSuite POS screens include key areas for working with transactions, performing tasks such as signing on and monitoring network connectivity, and for entering information and performing searches.

- Journal Window
- Status Bar
- Forms

Journal Window

The Journal displays all information about the current transaction. It is your main workspace. Items added to a transaction list as separate lines in sequential order, with the first item shown at the top and the current item at the bottom. The transaction summary in the lower section lists details about the total transaction, including the tax rate, subtotal and amount due.

This screen shot shows a typical transaction in progress. Your layout may vary.
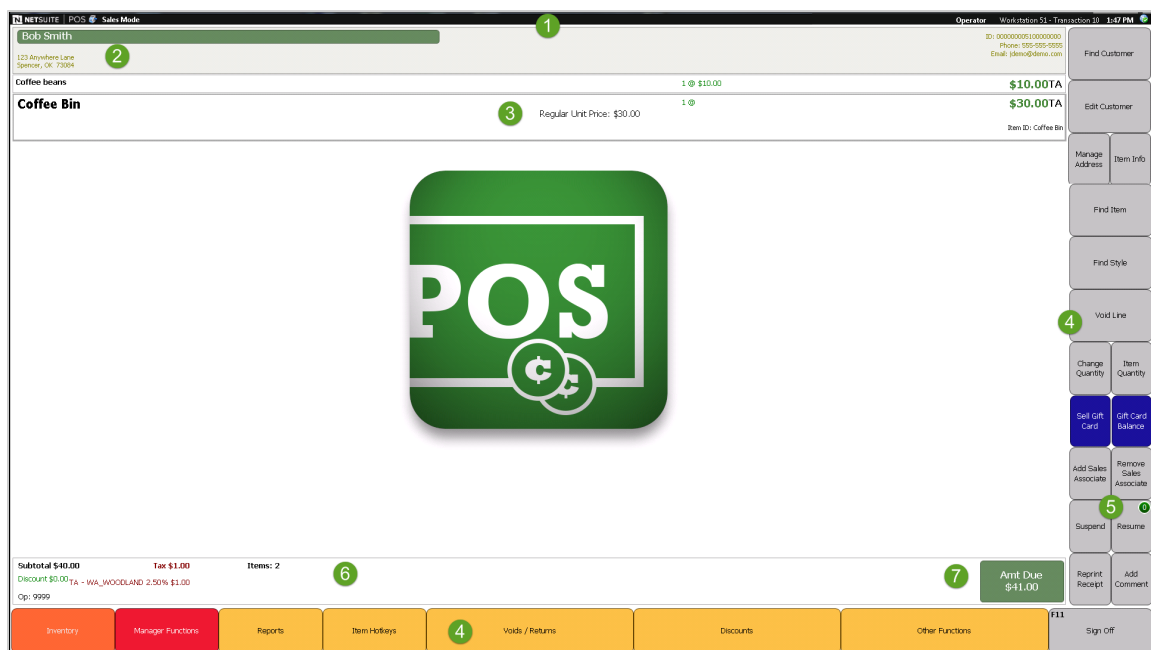
1. **Status Bar**— Shows details about the current session, including your sign-on name or type, workstation ID, number of transactions for the day, and whether your register is connected to the server. You can also view the current operating or register mode in the upper left corner. See Status Bar for more information.

2. **Customer Information** — Displays the selected customer's name, phone number and address. Double-click or tap the customer to display their recent sales and returns history.

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3. **Transaction Activity** — Shows the last item scanned, the quantity, price, any discounts or promotions applied, the tax category, POS ID (usually the UPC), and the Item ID. The Item ID lists the item name and the stock keeping unit (SKU).

4. **Main Button Bar** (bottom) and **Side Button Bar** (right) — Tap a button on the Main Bar to display its options or menu sub-pages in the Side Bar. Tap a Side Bar option to perform the task.

   Buttons may open windows for entering information, finding things such as customers or items, or for choosing from lists. NetSuite POS is highly customizable; your manager or system administrator may define buttons to perform functions not covered in this guide.

5. **Pending Operation** — Shown as a green circle with a number, this is the count of tasks pending for that button. Tap the button to see the list. The example shown here is the number of on hold or suspended sales transactions ready to resume.

6. **Transaction Summary** — Displays summary details about transaction, including the subtotal, discounts and taxes, ID of the person ringing up the transaction and the number of items purchased. Details update as each item is added and when payments take place.

7. **Amt Due** — Shows the total payment due. Tap to select a payment type and complete the transaction. If making a return, this displays a **Change** button with the money to be returned to the customer shown in brackets.

Journal Modes

The Journal display changes as you progress through a transaction.

- As you work, the current line is in **Summary** mode, displaying basic information about the item, coupon, customer, payment or other entry. Only the most recent entry appears in Summary mode.

- When you add items or payments to the transaction, previous lines in the Journal switch to **Compact** mode to save space. Compact mode displays only the most important information about the entry. Tap a line shown in Compact mode to display it in Summary mode.

- **Page** mode appears when you double-click or tap an entry. This comprehensive mode displays all available information about the entry, including sales history for customers or product details for items. Single-click or tap an entry in Page mode to return to Summary mode.

Some actions apply to the selected line only. This line always displays in Summary mode. For example, to void a previously entered item, tap that item's line. The line displays in Summary mode, indicating it is selected. Then tap the **Void Line** button.

A red security shield icon 🛡 appears on a button if you, the signed-on user, do not have sufficient permission to perform a task. The task can still be accessed if a manager or someone with similar privileges is available to enter their credentials and allow the override. The security level on any button can be changed by your system administrator.

> ✔ **Tip:** If you cannot find a button or its associated function, look it up by pressing Ctrl+F12. This opens the **Function List** window where you can search for the function by name or click/tap into function categories. You can also click/tap the Mode icon 🗗 in the Status Bar to access the list.

Status Bar

Located above the Journal, the Status Bar displays information about your NetSuite POS register status and provides options for signing on or off, clocking in or out, and exiting the application. You can also monitor your register's connectivity to your network.

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1. **Menu** — Use this to toggle the on-screen Keyboard, display the Function List, display the system Message Window (system administrator only) or to exit NetSuite POS.

2. **Mode Display** — Shows the current register mode. For example, Closed Mode or Sales Mode. See Register Modes.

3. **Operator Name** — Depending on your setup, this displays the name or ID of the signed-on user or the signed-on user type. You can tap the Operator Name to sign on or off and clock in or out.

4. **Workstation ID** — Shows the workstation or register ID.

5. **Transaction Number** — Displays the day's transaction count. In addition to sales transactions, this number includes control transactions such as the count of users that have signed on and the number of canceled transactions.

6. **Time** — Displays the time at your location.

7. **System Notifications** — Indicates there are messages and alerts waiting to be read. Blue icons are system information and red icons are errors or similar problems. Tap to view the messages.

8. **Sever Status** — Shows the status of the NetSuite server connection. If the register is not connected to the internet through the server, item and customer searches may be limited and certain payment types may be unavailable. A green check mark indicates the workstation is connected and fully ready to make transactions. A red icon indicates connectivity issues.

Forms

NetSuite POS includes pop-up forms for searching, selecting and entering information. For example, you look up items and find or add customers using forms.

Forms can include optional and required fields, as well as fields that are **display only**. NetSuite POS alerts you when a required field is incomplete or contains an invalid entry.

Forms display icons that guide you through completing the form. Some provide helpful hints on the information to be entered, while others perform tasks or identify required fields.

Tap the **Browse** icon to search for information or valid entries. These searches open a separate window.

Located directly on the form, enter text in **Search** fields to find items, customers, or other information based on the type of form. Search results display automatically after entering three characters. Searches are not case sensitive, and match any part of a word. For example, use **Find Item** search for a specific item.
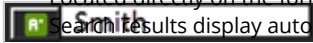
1. In **Sales Mode**, with or without a current transaction, tap **Find Item**.
2. In the search field, enter part of the item name. Exact, likely and near matches appear in the list. This is helpful when you are uns
3. If folders display, tap a folder to view the items inside.
4. Tap an item to add it to the transaction.

Required fields display an arrow. These fields must contain a valid entry and cannot be left blank.

Use **Text** fields for entering notes, comments or other information.

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Tap **Done** to save your changes or tap **Cancel** to go back.

Sometimes, when a window has options for multiple choices, your actions do not take effect until you tap the **Done** button.

Similar to Done and Cancel, tap the green check mark to enter a value or the red X to cancel.

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Show and **Hide** the on-screen **keyboard.** Use this for entering search criteria and text when you do not have an attached keyboard.

Scroll bars visible along the bottom or side of the window indicate that the form includes more options or fields. Scroll to view the entire

Best Practices for using a NetSuite POS register

The following are tips and guidelines for using your NetSuite Point of Sale (POS) register.

Keep the register powered on

Your register (the personal computer or workstation) and the network synchronize every 15 minutes.
Leave the register **powered on** to allow updates.

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- You can turn off the monitor to save electricity.

- Turn off Windows® hibernation features. Depending on your Windows version, go to Start Menu > Help and Support. Search for "hibernation" to display the steps. Select Never.

Using the register

- To print a receipt for a past sale or other transaction, touch **Reprint Receipt**. Click **Yes** to print the last receipt or **No** to search for transactions by day, week or date.

  Or press **Ctrl+F12** and search for **Reprint**.

- To troubleshoot hand-held barcode scanners:

  - Is it dirty? Clean lenses with a soft cloth or airbrush.

  - Keep the hand-held scanner in its focus range. Do not scan too close or too far away from the barcode. Orient the scanner with the bar code, not at an angle.

  - When outside, avoid scanning in direct sunlight. Bright lights can affect results.

- If the register does not appear on the monitor, look at the Task Bar to see if it is running, but minimized. Touch the icon to expand.

  If the POS application is not running, start it by tapping the **NetSuite Point of Sale** icon on your desktop.
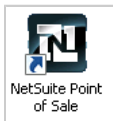
- Limit the applications running. Email, spreadsheets, and other programs can decrease performance. We recommend running **only** NetSuite POS during business hours.

- Be cautious opening email attachments or files from USB drives. Be sure your anti-virus software is up to date.

Working offline and handling errors

NetSuite POS can run on a register even if your internet connection is down. Because registers update by syncing with the network, being offline for a long time can slow performance after the connection is restored and updates are occurring.

If your register goes offline: If your register goes offline:

- Continue making transactions as usual.

- If possible, use a connected register instead.

- Gift Card and Gift Certificates cannot be sold or taken as payment.

- Details for certain types of Returns and other transaction history may not be available.

If errors display:

- Most error messages alert you to the corrective steps.

- If you cannot correct an error, write down the error code and message. Contact your manager or Technical Support.

- If the register freezes, you may need to restart the computer.

Sign On and Off your Register

ⓘ **Applies to:** NetSuite Point of Sale (NSPOS)

Use this section to learn how to start NetSuite POS on your register and sign onto your workstation. A register is the physical point of sale hardware, such as the screen, barcode scanner and keyboard. A workstation is associated with your store and sign on, and is the point of sale software on your register.

Because NetSuite POS is network-based, different workstations can be selected from the same register. When NetSuite POS loads on a new register for the first time, it may prompt you to choose a store and workstation. NetSuite POS remembers your choices for the next time you sign on.

Some system administrators prefer to set up **floating** workstations that enable a sales associate to move from one physical register to the next.

- Start and Exit NetSuite POS
- Sign On and Off
- Clock In and Clock Out (optional)
- Register Modes

Start and Exit NetSuite POS

If the application is not running at the register, you must start **NetSuite Point of Sale** from its icon on your register's desktop.

To start NetSuite POS:

1. Double-click or, if you have a tap screen, tap the NetSuite Point of Sale icon.
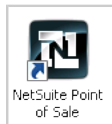
2. If prompted, select a store **Location** and/or a **Workstation**. NetSuite POS remembers your choices for the next time you sign in.

   If you select a workstation that is assigned to a different register, NetSuite POS asks you to confirm your choice. This signs off the workstation at the other register.

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> ✔️ **Tip:** If NetSuite POS fails to start, and you have just turned the register on, wait a few minutes for the register to establish connections with your back-office servers and other devices. Then try again.

To exit NetSuite POS:

Exiting NetSuite POS closes the register. This requires manager-level permission or above.

1. Sign off if not already done.
2. Do any of the following:
   - Tap the **Exit** button in the lower left.
   - Press **F1**.
   - Click the register icon in the upper left and select **Exit**.

Sign On and Off

To begin making sales and other transactions, you must sign on. Be sure to sign off if you leave your register and at the end of your shift.

> ℹ️ **Note:** NetSuite POS will automatically sign you off after 15 minutes of inactivity.

To sign on:

1. Do any of the following:
   - Tap the **No Operator** or other label at the top.
   - Tap the **Sign On** button.
   - Press **F11**.
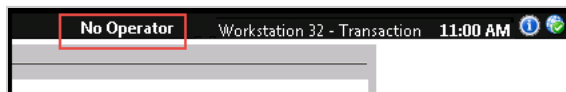
2. Enter your **User ID** and **Password**.
3. Tap **Confirm**.
4. If prompted, select your workstation by tapping its name.

To sign off:

1. Do any of the following:
   - Tap the **Operator** or other label at the top.
   - Tap the **Sign Off** button.
   - Press **F11**.
2. If prompted, tap **Exit**.

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3. If prompted, enter your **User ID** and **Password**.

4. Tap **Confirm**.

Clock In and Clock Out (optional)

Your NetSuite POS may include a time clock feature. This time clock is separate from signing on and off the register and, if available, can be used by all employees, not just sales associates. The appearance of these buttons may vary based on your setup.

The time clock is available even if no one is signed on to the register. However, you cannot clock in or out while a sales transaction is in progress.
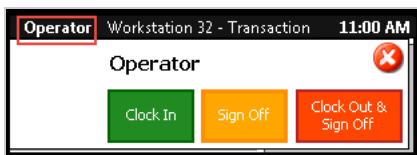
To clock in:

1. Tap **Clock In**, or tap the **Operator** or other label by the Workstation ID at the top.

2. Enter your **User ID** and **Password**.

3. Tap **Confirm**.

To clock out:

1. Tap **Clock Out**, or tap the **Operator** or other label by the Workstation ID at the top.

2. Enter your **User ID** and **Password**.

3. Tap **Confirm**.

Register Modes

The Status Bar at the top displays the register's current mode. Modes determine the activities that can be performed. For example, you must be in **Sales Mode** to ring up a sale. When the application is started but no operator or sales associate has signed on, the application is in **Closed Mode**. This mode offers limited options, typically **Clock In**, **Clock Out** and **Sign On** (to go to Sales Mode).

- **Closed Mode** — Clock in, clock out, sign on to Sales Mode.
- **Sales Mode** — Process all transactions except for special Customer Orders. Sales Mode transactions include adding items for purchase, applying discounts, processing returns and receiving payments.
- **Sales Order Mode** — Take and fulfill orders for out-of-stock or custom merchandise. After signing on to Sales Mode, tap **Other Functions** , **Sales Order** and then **Sales Order Mode**. See Sales Orders.

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Work with Transactions in NetSuite POS

ⓘ **Applies to:** NetSuite Point of Sale (NSPOS)

Use the tasks in this section to make sales transactions and perform special tasks such as suspending/resuming transactions, working with sales taxes, processing returns and printing receipts.

- Enter a Sales Transaction
- Discounts
- Sales Taxes
- Suspend, Resume, Cancel Transactions
- Returns
- Receipts
- Select Sales Associate
- Gift Cards and Gift Certificates
- Sales Orders

⚠ **Important:** NetSuite POS is highly customizable. Buttons, names and layouts on your screen may be different from those described here. Check with your manager for any instructions specific to your setup.

If you need to locate a button or task, press Ctrl+F12 to search the **Function List**.

Enter a Sales Transaction

Sales transactions are the primary function of NetSuite POS. The overall workflow for entering transactions is to first add a customer, then add items, optionally apply any discounts or special sales tax considerations, and finally accept payment.
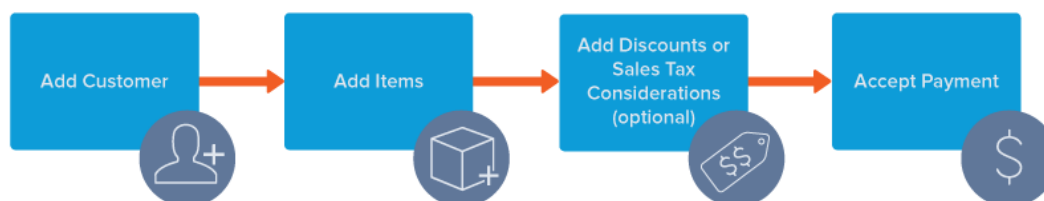
Follow these steps to ring up a sales transaction your NetSuite POS register. Steps for applying Discounts and working with Sales Taxes are provided in sections after the workflow below.

- Add Customers to a Sales Transaction
- Work with Items in a Sales Transaction
- Accept Payments for Purchases

Add Customers to a Sales Transaction

Use these steps to locate a customer and include them in a NetSuite POS sales transaction. Note that you can start a transaction and temporarily assign it to a guest customer account, returning later to

add actual customer information and reassign it. Unless your store has specific requirements, adding a customer to a sales transaction is **optional**. It is however, recommended.

> ℹ️ **Note:** Only one customer can be assigned to a single sales transaction.

To add an existing customer to a transaction:

Always search to see if a customer already exists in NetSuite POS.

1. Tap **Find Customer**.

2. Search for the customer by drilling into alphabetized folders or by entering the first few letters of the customer's first or last name.

   Search results display after entering three characters. Searches do not require pressing any additional buttons, are not case sensitive, and match any part of a name. If you do not have a keyboard, tap the green **Show Keyboard** 🔤 button.

   > ℹ️ **Note:** NetSuite limits the search to customers in the same subsidiary as the store. Subsidiaries are different divisions or companies under a corporate parent.

3. Tap the customer name to select them for the transaction.

   > ✅ **Tip:** To view the customer's past five transactions, tap the customer's name. Tap anywhere on-screen to return to the transaction.

To add a new customer to a transaction:

Do this if you are certain the customer is not in NetSuite POS.

1. Tap **Find Customer**.

2. Tap **Create Customer**.

3. Enter required and optional information.

   a. **Required** fields display an arrow 🔸.

   b. If the customer belongs to an **Organization** or **Customer Group** already set up in your system, select it. These are pre-defined by your system administrator. You cannot add an organization or group.

4. Tap **Done**.

To remove a customer from a transaction:

1. Tap **Find Customer**.

2. Tap **No Customer**.

3. If you need to assign a different customer, tap **Find Customer** again.

Work with Items in a Sales Transaction

After optionally selecting the customer, you must add items to the transaction. You can use a barcode scanner, find and select items from folders or from a search, or use item hotkeys. To remove an item, use the steps in this section to void it.

- Add Items using a Barcode Scanner

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- Add Items using Find Item
- Add Items using Item Hotkeys
- Void Items using a Barcode Scanner
- Void Items from the Journal

Add Items using a Barcode Scanner

Scanning an item's UPC or SKU is the fastest way to add items to a transaction.

To add items by scan:

1. Scan the item with your flat or hand-held barcode scanner.
2. If adding more than one of the same item, tap **Item Quantity** to enter the number being sold or scan each item individually.

Add Items using Find Item

Use this when an item cannot be scanned or to look through current inventory. You can search or browse through all available items.

To add items from a Find Item list:

1. Tap **Find Item**.
2. Locate the item using either method:
   - **Search** — Enter all or part of an item name or ID. Results display after you enter at least three characters. These include exact, likely and near matches.
   - **Browse** — Drill into the folder hierarchies by opening folders to view the items inside.

     To go back or move up to top level folders, tap **Item** at the top of the window.
3. Tap the item to add it to the transaction.
4. If adding more than one of the same item, tap **Change Quantity** to enter the number being sold.

Add Items using Item Hotkeys

Item hotkeys are buttons or groups of buttons that add items to the Journal when tapped. Use hotkeys as a quick method for ringing up store specials, common items or hard-to-scan items. Managers and system administrators can create and configure item hotkeys.

To add items from hotkeys:

1. Tap the **Item Hotkey** button assigned to the desired item.

   Often this is a single button on the Main bar that opens hotkeys on the Side bar. However, hotkeys can be located anywhere on the Journal, so you may want to ask your manager what keys are available and where.
2. If adding more than one of the same item, tap **Change Quantity** to enter the number being sold.

Void Items using a Barcode Scanner

Follow these steps to remove an item from a sales transaction using your barcode scanner.

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To void an item by scan:

1. Tap **Voids / Returns**.
2. Tap **Void Scan**.
3. At the **Scan or enter barcode** prompt, scan the item or manually enter its barcode.
4. Tap **Enter**.
5. If prompted, select a **Reason** from the list and tap **Enter**.
6. The current line item is flagged as VOID. Voided items appear on the receipt with a translucent red watermark.

Void Items from the Journal

Follow these steps to remove an item by selecting its line item on-screen.

 Watch a Related Video

To void by Journal line item:

1. Select the item to void in the Journal.
2. Tap **Voids / Returns**.
3. Tap **Void Line**.
4. If prompted, select a **Reason** from the list.
5. The current line item is flagged as VOID. Voided items appear on the receipt with a translucent red watermark.

Accept Payments for Purchases

In NetSuite POS, your customers can choose from a variety of methods to tender payment for their merchandise. The following are standard payment types. Your setup may not accept all types.

- Paying with Cash
- Paying with Cash using Preset Amounts
- Paying with a Check
- Paying with a Credit Card
- Paying with a Debit Card
- Paying with a Gift Card or Gift Certificate
- Split Tender – Taking more than one type of Payment
- No Sale (open the cash drawer)

> (i) **Note:** When the drawer opens for cash and other payments, portions of the screen are unavailable until you close the drawer.

Paying with Cash

Follow these steps to receive cash for a sales transaction.

To accept a cash payment:

1. When you have finished ringing up all items, tap **Amt Due**.

2. Tap **Cash**.

3. Use the keypad to enter the cash received.

> ✔ **Tip:** NetSuite POS uses decimal assumption to convert round entries into decimal numbers. For example, **350** converts to $3.50. To enter $350.00, enter the numbers **35000**.

4. Tap **Enter** or the green check mark.

    Each payment appears in the Journal and reduces the **Amt Due**. When the payment received meets or exceeds this amount, the Journal displays the **Cash Change**, the cash drawer opens and the receipt prints.

5. Give the customer their change and receipt.

Paying with Cash using Preset Amounts

Your system administrator can customize NetSuite POS to receive cash in preset amounts. For example, if a customer tenders $40, you can tap a $20 preset button twice to quickly enter the amount and calculate the change. Not all setups include preset amount buttons.

To accept cash in preset amounts:

1. When you have finished ringing up all items, tap **Amt Due**.

2. Tap the applicable preset cash amount button, such as **$20 Cash**.

3. Repeat based on the cash received from the customer.

    Each payment appears in the Journal and reduces the **Amt Due**. When the payment received meets or exceeds this amount, the Journal displays the **Cash Change**, the cash drawer opens and the receipt prints.

4. Give the customer their change and receipt.

Paying with a Check

Follow these steps to receive a bank check as payment for a sales transaction.

To accept a check payment:

1. When you have finished ringing up all items, tap **Amt Due**.

2. Tap **Check**.

3. Enter the amount of the check.

4. Tap **Enter** or the green check mark.

5. Enter the check number when prompted.

6. Tap **Enter** or the green check mark.

    The cash drawer opens and the receipt prints.

7. Insert the check in the cash drawer and give the customer their receipt.

Paying with a Credit Card

Depending on the hardware setup at your store and your country location, you or your customer can slide or insert credit cards through an attached card swipe reader or a CAT/PIN Pad terminal. Credit card payments are automatically routed through the third-party processor selected by your company.

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To accept a credit card payment:

1. When you have finished ringing up all items, tap **Amt Due**.

2. Tap **Credit Card**.

3. Enter the amount to pay with the card.

4. Tap **Enter** or the green check mark.

5. When prompted, ask the customer to swipe their card or swipe it for them.

   - You can manually enter the 16–digit card number and tap **Enter**. Follow the prompts to enter additional required information.

   - A signature may be required. If there is no customer facing terminal, a receipt prints with a signature line.

   When all information is entered, NetSuite POS processes the charge through your credit card payment provider. The payment appears in the Journal when processing completes.

6. The receipt prints. If a signature receipt also prints, ask the customer to sign and then place it in the cash drawer.

7. Give the customer their receipt.

About Prepaid Credit Cards. A prepaid credit card is any card pre-loaded with currency from a major credit card provider such as Visa® or MasterCard®. These cards should be processed as **credit cards**, not gift cards.

Prepaid credit cards can have two important attributes that may vary by card issuer:

- Some cards support a feature called partial authorization. This is used when the total amount due is greater than the total remaining balance on the card. Instead of declining, NetSuite POS applies whatever balance it can to the transaction.

- Most cards have a delayed transaction-return time where a previously used card balance is not available for reuse. If a credit card payment line is voided or a return is performed to the card, that money may not be available for 24 hours. Advise the customer to contact the card issuer if they need more information.

Paying with a Debit Card

Debit cards are handled similar to credit cards except that they require the customer to enter their PIN (personal identification number). These generally require a customer-facing swipe device with a PIN pad.

If no device is available, you can process a debit card payment on-screen as a credit card.

To accept a debit card payment:

1. When you have finished ringing up all items, tap **Amt Due**.

2. Tap **Debit Card**.

3. Enter the amount to debit.

4. Tap **Enter** or the green check mark.

5. At the **Please Slide Debit Card** prompt, advise customer to swipe their debit card and follow the card reader prompts.

   NetSuite POS processes the debit through your credit card payment provider. The payment appears in the Journal and the receipt prints when processing completes.

6. Give the customer their receipt.

Paying with a Gift Card or Gift Certificate

Follow these steps to accept a gift card or certificate as payment for a sales transaction. Gift cards are usually physical cards, while gift certificates are sent via email and use an Authorization Code. For more information, see Gift Cards and Gift Certificates.

- A **single** gift card or certificate can be used only one time per transaction.
- You can accept **gift cards with balances greater** than the amount due. The balance will remain on the card.
- If a customer pays with a **gift certificate having a balance greater** than the amount due, you must give customer the balance in cash.

To accept a gift card payment:

1. When you have finished ringing up all items, tap **Amt Due**.
2. Tap **Gift Card**.
3. Tap **Card**.
4. Enter the **Gift Card Amount** to subtract.
5. Tap **Enter** or the green check mark.
6. At the **Please Slide Gift Card** prompt, advise customer to swipe their gift card. You can enter the card number manually if needed.
7. If the **Amount Due** (for example, $60.00) is greater than the **Gift Card Amount** you entered (for example, $50.00):
   - Tap **Yes** to apply the full gift card amount. You must enter an additional payment, also called split tender.
   - Tap **No** to cancel, and then select a different payment type.
8. The receipt prints. Give the customer their receipt.

To accept a gift certificate payment:

> ⊗ **Warning:** If a customer pays with a gift certificate that has a balance greater than the total amount due, you must **return the remaining balance to the customer in cash**. Otherwise the balance will become unavailable. This limitation affects gift certificate balances only, it does not apply to gift cards.

1. When you have finished ringing up all items, tap **Amt Due**.
2. Tap **Gift Card**.
3. Tap **Certificate**.
4. Enter the **Gift Certificate Amount** to subtract.
5. Tap **Enter** or the green check mark.
6. Enter the certificate **Authorization Code**.

   > ⓘ **Note:** This may appear as **Gift Certificate/Card Serial Number**.

7. Tap **Enter** or the green check mark.

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8. If the **Amount Due** (for example, $60.00) is greater than the **Gift Card Amount** you entered (for example, $50.00):

    - Tap **Yes** to apply the full gift certificate amount. You must enter an additional payment, also called split tender.

    - Tap **No** to cancel, and then select a different payment type.

9. The receipt prints. Give the customer their receipt.

Split Tender – Taking more than one type of Payment

When a customer uses more than one type of payment, such a gift card and cash, we call that a split tender payment. No specific task is required to make a split tender; just tap the next payment type. If a customer wants to change a payment method already made, you can select the payment line in the Journal and tap **Void Line**.

> ⚠ **Important:** A **single credit** or **debit card** can only be used **once** per transaction.

To accept multiple payment types:

1. When you have finished ringing up all items, tap **Amt Due**.

2. Select the first payment type.

3. Enter an amount less than the total amount due. The tendered amount is added to the transaction in the Journal and subtracted from the **Amt Due**.

4. Tap the next payment type button.

5. Enter the next amount.

    When the payments meet or exceed the **Amt Due**, the Journal displays any **Cash Change**. The receipt prints and the cash drawer opens if change is due or to insert a check.

6. Give the customer any change and receipt.

In the example below, a transaction is split into two payment types.

No Sale (open the cash drawer)

Follow these steps to open the cash drawer without performing a sale. You must select a **Reason Code** describing why you performed this action.

To open the cash drawer without a sale:

1. Tap **No Sale**.

2. Choose the **Reason Code** and tap **Select**.

3. The cash drawer opens. Complete your task and close the drawer.

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Discounts

Based on your permission settings, you can manually reduce the price of an item or apply a discount to an entire sales transaction. NetSuite POS offers many different discount functions. However, they are all based on the same five methods:

- **Item % Off** — An item discount you enter as a percentage off the original item price. For example, reduce the price of an item by 25%.
- **Item $ Off** — An item discount you enter in units of currency subtracted from the original price. For example, take $5.00 off an item's price.
- **Sale % Off** — A sales transaction discount you enter as a percentage off the total sale. For example, 25% off the entire transaction.
- **Sale $ Off** — A sales transaction discount you enter in units of currency subtracted from the total sale. For example, a $10.00 discount off the entire transaction.
- **Price Override** — Depending on permissions granted for your setup, you can override the price of an item by entering a lower price. For example, a sales associate might lower the price of an item from $59.99 to $49.99 to match a competitor's price. A manager's approval may be required. **Do not use Price Override to increase a price.**

Your system administrator can define **Reason Codes** to track price changes. This provides visibility to discounts provided for specific promotions or for things such as sales of damaged merchandise. Discounts can also be removed at the item and sale total levels.

This section details the five main discount types. Also see Other Discounts and Actions for steps to apply other discount types and to void discounts from the current transaction.

> ⓘ **Note:** Active **promotions** apply discounts automatically. When applied to an item, the promotion name appears in the item's Journal line.

Item % Off

Follow these steps to discount an item by a percentage.

To apply an item % off discount:

1. Start a sales transaction.
2. Scan or select the item to discount.
3. Tap **Discounts**.
4. Tap **Item % Off**.
5. Enter the **Discount %** as a number, without the percent sign. For example, enter 10 for 10%.
6. Tap **Enter** or tap the green check mark.
7. Choose a **Percent Discount Reason Code** and tap **Select**.
8. Confirm the discount percentage and Reason Code appear for the item and that the discount has been applied to the **Subtotal**.

Item $ Off

Follow these steps to apply a discount to an item by a fixed amount.

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To apply an item $ off discount:

1. Start a sales transaction.
2. Scan or select the item to discount.
3. Tap **Discounts**.
4. Tap **Item $ Off**.
5. Enter the **Discount $** as a number, without a currency symbol. For example, enter 1.00 (or 100 with decimal assumption on) to apply a $1.00 discount.
6. Tap **Enter** or tap the green check mark.
7. Choose a **Price Reduction Reason Code** and tap **Select**.
8. Confirm the discount amount and Reason Code appear for the item and that the discount has been applied to the **Subtotal**.

Sale % Off

Follow these steps to discount an entire sales transaction by a percentage.

To apply a sale % off discount:

1. Start a sales transaction.
2. Tap **Discounts**.
3. Tap **Sale % Off**.
4. Enter the **% Sale Discount** as a number, without the percent sign. For example, enter 10 for 10%.
5. Tap **Enter** or tap the green check mark.
6. Choose a **Percent Discount Reason Code** and tap **Select**.
7. Confirm the discount percentage and Reason Code appear and that the discount has been applied to the **Subtotal**.

NetSuite POS spreads the discount equally among all items on the transaction. The discount is applied to the total – including sales tax – by reducing each item's price and tax in equal proportions.

Sale $ Off

Follow these steps to discount an entire sales transaction by a fixed amount.

To apply a sale $ off discount:

1. Start a sales transaction.
2. Tap **Discounts**.
3. Tap **Sale $ Off**.
4. Enter the **Discount Amount** as a number, without a currency symbol. For example, enter 1.00 (or 100 with decimal assumption on) to apply a $1.00 discount.
5. Tap **Enter** or tap the green check mark.
6. Choose a **Price Reduction Reason Code** and tap **Select**.
7. Confirm the discount amount and Reason Code appear and that the discount has been applied to the **Subtotal**.

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NetSuite POS spreads the discount equally among all items on the transaction. The discount is applied to the total – including sales tax – by reducing each item's price and tax in equal proportions.

Price Override

You can choose this discount type to lower an item's price. The override applies to the current transaction only, and may require your manager's approval.

> ⚠ **Important:** Use Price Override to **lower** a price only. Do not use it to increase a price.

To override a price:

1. Start a sales transaction.
2. Scan or select the item to override.
3. Tap **Discounts**.
4. Tap **Price Override**. A numeric keypad appears showing the original price for the item less any applied discounts or previous overrides.
5. Enter the **New Price** as a number, without a currency symbol. For example, enter 49.99 (or 4999 with decimal assumption on).
6. Tap **Enter** or tap the green check mark.
7. Choose a **Price Override Reason Code** and tap **Select**.
8. Confirm the new price and Reason Code appear for the item and that the new price has been applied to the **Subtotal**.

Other Discounts and Actions

NetSuite POS includes options for other discount types.

- Manufacturer Coupon
- Discounts for Damaged Items
- Employee Discount

You can remove discounts applied to a transaction.

- Remove Item Discount
- Remove All Discounts

Manufacturer Coupon

A coupon is a form of discount. Coupons can be a set amount off an item's price, or they can be redeemed for free items. Sales associates typically scan coupons directly after scanning or selecting the item referenced in the coupon. Scanning a coupon usually means no further steps are necessary.

Follow these steps only if you need to manually redeem a coupon by entering the coupon details.

To manually redeem a manufacturer coupon:

1. Start a sales transaction.

2. Scan or select the item or items eligible for the coupon.

3. Receive the coupon from the customer.

4. Tap **Discounts**.

5. Tap **Manufacturer Coupon**.

6. Enter the **Manufacturer Coupon Amount** as a number, without a currency symbol. For example, if the coupon is $0.50 off, enter 0.5 (or 50 with decimal assumption on).

   If the coupon can be redeemed for a free item, enter the value of the free item, subject to the maximum value shown on the coupon.

7. Tap **Enter** or tap the green check mark.

8. Confirm the coupon value is applied to the **Subtotal**.

Discounts for Damaged Items

You can apply a discount to the price of an item that is damaged.

To apply discount for damaged items:

1. Apply any of the discount types listed previously, such as **Item $ Off**.

2. Choose a **Reason Code** of **Damaged**.

3. Tap **Select**.

> ⚠️ **Important:** **Damaged Items** – If you have **more than one of the same item** on a sales transaction , and you apply a damaged item discount, that discount is applied to each item. For example, a $5.00 discount for one damaged item that is part of a quantity of three results in a total discount of $15.00.
>
> **To apply a damage discount to one item only,** either apply a **Sale $ Off** discount to the entire sales transaction or enter the transaction with the damaged item appearing in a separate line.

Employee Discount

You can apply an employee percent off discount to all items in a sales transaction. Your system administrator has set the discount percent based on your store's policy.

To apply an employee discount:

1. Start a sales transaction.

2. Tap **Discounts**.

3. Tap **Employee Discount**.

4. Tap **Enter** or tap the green check mark.

5. Continue as a normal sales transaction.

Remove Item Discount

You can remove discounts manually applied to single items.

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To remove an item discount:

1. Select a discounted item.
2. Tap **Discounts**.
3. Tap **Remove Item Discount(s)**.
4. At the **How would you like to remove discounts?** prompt:
   - Tap **Last One** to remove only the most recent discount applied to that item.
   - Tap **All** to remove every discount applied to that single item. This function only removes discounts for the line item that you selected. It does not remove discounts applied to other items in the transaction.

Remove All Discounts

You can remove all discounts manually applied to the sales transaction.

To remove all discounts:

1. Tap **Discounts**.
2. Tap **Remove Sale Discounts** or **Remove All Discounts**.
3. At the **Are you sure you want to remove all discounts?** prompt, tap **Yes**.

Sales Taxes

NetSuite POS defaults the sales tax charged to customers to the rate in your location's tax jurisdiction. The application chooses the tax jurisdiction from the zip code or other postal code at your store. However, you can set the transaction tax rate to zero for tax-exempt organizations such as non-profit charities.

Make a Transaction Tax Exempt

Follow these steps to specify that a customer is legally tax exempt and should have no sales tax applied. This requires that the customer show proof of their organization's exempt status by providing their tax exemption certificate or number.

> ⓘ **Note:** You must select a **Reason Code** to describe the exemption. If no Reason Code is available, the Tax Exempt button will not function. Contact your internal NetSuite POS administrator for correction.

To make a transaction tax exempt:

1. Begin the sales transaction.
2. Under **Other Functions**, tap **Tax Exempt**.
3. If not already done, find and select the **Customer**.

   This is required for tax exempt transactions. See Add Customers to a Sales Transaction.
4. At the **Enter the tax exemption certificate ID** prompt, enter the authorized state or local sales tax exemption number and tap the green check mark.

5. Choose a **Tax Exemption Reason Code** and tap **Select**. For example, choose **Non-Profit**.

6. In the transaction summary area, verify that no tax ($0.00) is applied to the transaction.

Tax by Zip Code — Apply a Different Jurisdiction's Tax Rate

> ⊗ **Warning:** The ability to apply a different tax rate requires configuration by NetSuite|Oracle Professional Services. Attempting to apply a different rate without the correct setup **could result in incorrect taxes** being calculated.

Follow these steps to apply the tax rate for another jurisdiction to the current sales transaction. A tax jurisdiction is a city, county or other region with distinct tax regulations. For example, each city usually has its own sales tax rate.

Do this if the customer's business pays taxes outside of your store's jurisdiction. For example, branch offices operating locally may pay taxes through a corporate office found in a different state.

This feature requires that your system administrator maintain up-to-date tax tables arranged by U.S. zip code or other applicable postal codes. The following is written for U.S. setups.

To apply a different tax rate:

1. Begin the sales transaction.

2. Under **Other Functions**, tap **Tax by Zip Code**.

3. At the **Enter the 5-digit zip code to use for tax calculations** prompt, enter the zip code for the applicable tax jurisdiction and tap **Enter**.

4. If not already done, optionally find and select the **Customer**.

5. In the transaction summary area, verify the correct tax jurisdiction is applied to the transaction.

Suspend, Resume, Cancel Transactions

If a customer is not ready to complete a purchase, but wants to keep the item list and return to complete it later, you can suspend the NetSuite POS sales transaction. This saves all details about the potential purchase and lets you start a new transaction with the next person in line. You can quickly resume the transaction when the customer is ready.

You can cancel current transactions in progress and cancel suspended transactions if the customer declines to return to complete the purchase. After your store's time limit on holding transactions has expired, suspended transactions cancel automatically. You cannot resume a canceled transaction.

- Suspend a Transaction
- Resume a Suspended Transaction
- Cancel a Suspended Transaction
- Cancel a Current Transaction

Suspend a Transaction

Follow these steps to suspend and save all details about a transaction, including the customer's name, items and any applied discounts.

> ⚠️ **Important:** **After any form of payment is applied,** in full or in part, you can no longer suspend a transaction.

To suspend a transaction:

1. Start a sales transaction.
2. Tap **Suspend**. This may appear under **Other Functions**.
3. Collect the two receipts that print. Give the summary version to the customer and keep the detailed version. You can scan either receipt later to quickly resume the transaction.

Resume a Suspended Transaction

Use these steps to resume a transaction and continue processing the sale. You can do this from any register connected to your NetSuite POS network. If the transaction does not appear in the **Resume** list, it was manually canceled or the time limit has expired.

Suspended transactions take about five minutes to be available from other registers. This means a transaction suspended on one register may not be immediately eligible for resuming on another register.

To resume a suspended transaction:

1. Verify that you have no transactions open in the Journal.
2. Verify that a green circle appears on the **Resume** button showing at least one suspended transaction. This may appear under **Other Functions**.
3. Tap **Resume**.
4. When the **Resume Transaction** window displays, either:
   - Scan the suspend transaction receipt.
   - Locate the transaction by drilling into the transaction day's folder.
   - Search for the suspended transaction by customer name.
5. Select the transaction.
6. Complete the sale by adding items or taking payment.

Cancel a Suspended Transaction

If a customer will not resume a suspended transaction, follow these steps to remove it from the list.

To cancel a suspended transaction:

1. Verify that you have no transactions open in the Journal.
2. Verify that a green circle appears on the **Resume** button showing at least one suspended transaction. This may appear under **Other Functions**.
3. Tap **Resume**.
4. When the **Resume Transaction** window displays, either:
   - Scan the suspend transaction receipt.
   - Locate the transaction by drilling into the transaction day's folder.
   - Search for the suspended transaction by customer name.
5. Select the transaction and tap **Enter**.
6. Tap **Voids / Returns**.

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7. Tap **Cancel Transaction**.
8. Choose a **Reason** from the list and tap **Select**.

Cancel a Current Transaction

Follow these steps if the customer decides to cancel their transaction while it is in progress.

▶ Watch a Related Video

To cancel a current transaction:

1. Tap **Voids / Returns**.
2. Tap **Cancel Transaction**.
3. Choose a **Reason** from the list and tap **Select**.

   All line items are voided and a new transaction can begin.

Returns

A return is when a customer makes a purchase and then later decides the item is unwanted. They return the item to the retailer, requesting a refund or item exchange. Gift recipients who are not the original customer might also return an item. In NetSuite Point of Sale (NSPOS), customers or recipients can return items to any store or location that is using NSPOS within the retailer's NetSuite ERP subsidiary.

NSPOS provides two methods for accepting returns from a customer:

- Return with Receipt — A return that requires locating the original transaction. This can be done either through scanning the receipt or looking up the sales transaction by date, customer, or other criteria. Also called a validated return, this type of return can reduce fraud and mistakes.

- Return without Receipt — A return that does not require the customer to provide a receipt or the cashier to find the original transaction as proof of purchase. The cashier scans the item bar code or looks up the item on the register to determine the amount to refund.

Your customers can receive a refund in cash, as a gift card, or have it credited to a credit or debit card. If they want a refund to the credit or debit card originally used, they are not required to have that card on hand to swipe. Another refund option is to exchange the item by making a return and then purchasing a replacement.

NSPOS displays a **RETURN** watermark on the Journal line item. Unless the cashier adds items for purchase, the Journal shows the amount to be refunded as **Change**.

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Because sales transactions take about five minutes to replicate to other registers, a transaction made on one register may not be immediately eligible for return on another register.

> ℹ️ **Note:** If the original transaction includes more than one of the same item, NetSuite POS prompts you to enter the quantity.
>
> If a second return against the same transaction is started, the system displays which items were already returned.

> ⚠️ **Important:** If the customer purchased the returned items using a gift card, the cashier **cannot** put the refund on that card. The refund can be provided on a new gift card if desired.

> ❌ **Warning:** If the return is an exchange, where the original item is replaced by a new item within the same transaction, any current **promotions** available for the new item will not be applied. To use a promotion, 1) refund the original item in one transaction and 2) purchase the new item in a separate transaction.

> ❌ **Warning:** Do **not** perform an item **Return** while creating or updating a **sales order**. Making Returns during a sales order can result in an error that requires restarting NetSuite POS on the register.

Return with Receipt

This type of return is verified against a transaction, usually with the original receipt. Note that by using this method customers can purchase items from your business online and return them to your store.

To make a return with Receipt:

1. From the Main (bottom) button bar, tap **Voids/Returns**.
2. Tap **Return Receipt Search**.
3. At the **Scan or enter the receipt barcode** prompt, do one of the following:
   - Scan the barcode on the receipt.
   - Enter the barcode number from the receipt and tap **Enter**.
   - If the receipt barcode is not available, press **Esc** on your keyboard or tap **X** on-screen to find the original transaction by date. Search for and select the transaction.
4. Select the return items and tap **Done**. You can also tap **Return All** to return all items.
5. Select a **Reason Code** for the return. For example, choose damaged, wrong size or changed mind.
6. Verify the item appears in the Journal and you see:
   a. The item row is stamped **RETURN**.
   b. The transaction shows **Change** due to the customer instead of **Amt Due**.
7. Tap **Change**.
8. Tap the method for returning payment to the customer, usually **Credit Card** or **Cash**.
   - If **Credit Card**, follow any prompts that may appear on-screen.
   - If **Cash**, provide the **Cash Change** shown to the customer.
9. If a return receipt prints with a signature line, ask the customer to complete. Place it in the cash drawer.

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Return without Receipt

Follow these steps to process a simple merchandise return without proof of purchase. This method is generally quicker than a validated return, but is also more prone to fraud.

To make a return without receipt:

1. From the Main (bottom) button bar, tap **Voids/Returns**.
2. Tap **Return w/o Receipt**.
3. At the **Scan or enter the barcode of the item to return** prompt, do one of the following:
   - Scan the returned item.
   - Enter the item barcode and tap **Enter**.
   - Tap **X** on-screen to search for and select the item.
4. Select a **Reason Code** for the return. For example, damaged, wrong size, or changed mind.
5. Verify the item appears in the Journal and you see:
   - The item line displays **RETURN**.
   - The transaction shows **Change** due to the customer instead of **Amt Due**.
6. Tap **Change**.
7. Tap the method for returning payment to the customer, usually **Credit Card** or **Cash**.
   - If **Credit Card**, follow any prompts that may appear on-screen.
   - If **Cash**, provide the **Cash Change** shown to the customer.
8. If a return receipt prints with a signature line, ask the customer to complete. Place it in the cash drawer.

Apply Refund to a new Gift Card

Follow these steps to apply a returned item refund to a gift card. Funds must go to a new gift card; you cannot add funds to an existing card, even if it was used to purchase the items originally.

To apply a refund to a new gift card:

1. From the Main (bottom) button bar, tap **Voids/Returns**.
2. Choose the type of return:

   <u>With a Receipt</u>

   1. Tap **Return Receipt Search**.
   2. Scan the receipt barcode or enter the transaction number from the receipt.
   3. If prompted, find and select the **Customer**.
   4. Select the items to return. For all items, tap **Return All**.
   5. If prompted, select a **Reason Code**.

   <u>Without a Receipt</u>

   1. Tap **Return w/o Receipt**.
   2. Scan the item barcodes or enter manually.
   3. If prompted, select a **Reason Code**.

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3. When all return items appear in the journal, tap **Sell Gift Card** or **Issue Gift Card** from the right button bar.

4. Enter the amount to add to the new Gift Card. This should match the item return total, including taxes.

5. Swipe the Gift Card or enter the Gift Card number and authorization code printed on the card.

6. Tap **AMT DUE**. This should now be $0.00.

7. Select a payment method of **Cash**. This completes the transaction and prints the receipt.

8. Give customer the printed receipt. This provides the returned item list and details about the Gift Card.

Customer must wait 15 minutes before checking balance or using the Gift Card.

Receipts

You can assist customers in NetSuite POS by reprinting a receipt from a previous transaction. Typically customers request this for their record keeping or for submitting an expense report or purchase order. Also helpful is printing gift receipts that provide gift recipients with a method to return items without immediately knowing the value of the gift.

- Reprint Receipt
- Print Gift Receipt
- About the Receipt Transaction Barcode

Reprint Receipt

Follow these steps to reprint a transaction receipt.

> **Note:** You can only reprint a receipt from the NetSuite POS register on which the purchase was made.

To reprint a receipt:

1. Tap **Reprint Receipt**.

2. At the **Would you like to print the last receipt?** prompt:

   - Tap **Yes** to print the receipt for the last transaction.

   - Tap **No** to search for a transaction in the **Past Retail Transactions** list. Tap a transaction to print the receipt.

   The receipt prints.

Print Gift Receipt

To ease making returns for a gift recipient, you can print a gift receipt for an entire transaction or only selected items from the transaction.

To print a gift receipt:

1. Tap **Print Gift Receipt**. This may appear under **Other Functions**.

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3. Collect the two receipts that print. Give the summary version to the customer

2. At the **Would you like to print the last receipt?** prompt:

   - Tap **Yes** to print the receipt for the last transaction.

   - Tap **No** to search for a transaction in the **Past Retail Transactions** list. Tap a transaction to print the receipt.

3. You have the option to print **All Items** from a transaction on the gift receipt or specific items only. After selecting items, tap **Done** to print.

   The gift receipt prints.

About the Receipt Transaction Barcode

Each receipt includes a transaction barcode at the bottom. This barcode can be scanned to resume suspended transactions and return items. The details are included here for informational purposes only.

This 32–character code is divided into the following sections:

- 1 — 8 is the Store ID

- 9 —16 is the Workstation ID

- 17 — 24 is the Transaction Date

- 25 — 32 is the Transaction Number

Select Sales Associate

Some business processes require selecting a sales associate for each transaction. This is in addition to signing on to the register to start the business day. Assigning a person to a NetSuite POS transaction is helpful for things like tracking commissions or performing customer-satisfaction surveys. Sales associates are also known as sales representatives in NetSuite.

To select a sales associate for a transaction:

1. Start a sales transaction.
2. Tap **Add Sales Associate**.
3. Search for the sales associate or browse through the list.
4. Select the associate to add. Tap **Done** if the window does not close automatically.

   The sales associate displays in the transaction summary at the bottom.

To remove a sales associate from a transaction:

With a sales transaction started and a sales associate assigned:

1. Tap **Remove Sales Associate**.

Gift Cards and Gift Certificates

Use this topic as a guide to creating and using gift cards and certificates on your NetSuite Point of Sale (NSPOS) registers. NSPOS provides tools for selling and accepting internal NetSuite-based gift cards/certificates and for working with external gift cards issued by an authorized third-party.

In general, the cashier hands plastic gift cards to the customer after activation and payment, while gift certificates are available online for purchases from your store's website or by providing the authorization code at the register. NSPOS can sell both gift cards and gift certificates, but the same funds can only be used for one type or another. For example, a sales associate can sell a $50 gift entity, but it must be either a card or a certificate – not both.

- Sell a NetSuite Gift Card/Certificate
- Check Balance of NetSuite Gift Card/Certificate
- Use a NetSuite Gift Card/Certificate
- Sell an External Authorized Gift Card
- Check External Authorized Gift Card Balance
- Cash out a Gift Card

Also see Apply Refund to a new Gift Card.

> ⊗ **Warning:** If a customer pays with a gift certificate that has a balance greater than the total amount due, you must **return the remaining balance to the customer in cash**. Otherwise the balance will become unavailable. This limitation affects gift certificate balances only, it does not apply to gift cards.

Sell a NetSuite Gift Card/Certificate

NetSuite supports issuing in-store gift cards and certificates to be used by the purchasing customer or a gift recipient. These sellable items are added to a transaction similar to how regular items are purchased. They are activated automatically after payment is received and the transaction has synced with NetSuite, usually within 15 minutes.

> ⓘ **Note:** You cannot add funds to an existing gift card.

To sell a NetSuite gift card/certificate:

1. Tap **Sell Gift Card** or **Issue Gift Card**.
2. If prompted with **Make card available as online certificate?**, this selects whether to sell a hard plastic gift card or make the gift amount available via email only.
   - Tap **Yes** to email a certificate version of the gift card to the recipient.
   - Tap **No** to sell a plastic gift card.
3. If you tapped **Yes** for an online certificate:
   a. Complete the **Recipient Email Address**, **Sender Name** and **Recipient Name** fields.

   > ⚠ **Important:** Confirm spelling of the email address with the customer. Entering an incorrect email address results in undeliverable email or the gift certificate being sent to someone else.

   b. Tap **Done**.

4. Enter the **Issue Gift Card Amount** and tap **Enter** or tap the green check mark.

5. If prompted to **Please slide Gift card**, swipe the card or enter the card number.

6. Tap **Enter** or the green check mark.

7. If gift card, hand it to the customer. It is activated and ready to use.

8. If they requested a gift certificate by email, tell them the certificate email will go out shortly.

> ⊗ **Warning:** Gift cards or certificates should not be used for payment in the same transaction in which it was issued.

> ⊗ **Warning:** Customers must wait 15 minutes before using or the checking balance of a new gift card or certificate. The issuing transaction must upsync to NetSuite ERP before first use.

Check Balance of NetSuite Gift Card/Certificate

Follow these steps to get the balance of an internal gift card/certificate.

To find the balance on a NetSuite gift card/certificate: :

1. Tap **Gift Card Balance**.

2. Select whether to find the balance as a gift **Certificate** or **Card**.

   - If **Certificate**, enter the **Authorization Code** and tap the green check mark.
   - If **Card**, swipe the card or enter the card **Number** and tap the green check mark.

   NSPOS displays the available balance.

Use a NetSuite Gift Card/Certificate

Follow these steps to use a NetSuite gift card or certificate as full or split-tender payment for an NSPOS transaction. Funds applied to a card or certificate remain available for transactions until the funds are depleted. You cannot add funds to an existing gift card or certificate.

To use a NetSuite gift card/certificate for full payment:

Follow these steps when the balance on a gift card or certificate is sufficient to cover the amount due in full.

1. Scan or search for items and add them to the journal.

2. Tap **Amt Due**.

3. Tap **Gift Card** as the tender.

4. Enter the amount to pay from the card or certificate.

   > ⓘ **Note:** Gift cards and certificates support partial redemption. If the amount due is lower than the card or certificate balance, the customer can use the remaining balance in a later transaction.

5. Receive the customer's payment.

   - If gift card, have the customer swipe it or you can enter the card number.
   - If gift certificate, enter the authorization code.

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6. If the card or certificate balance is not enough to pay the transaction in full, accept another form of payment.

> ❌ **Warning:** Do not accept a gift card or gift certificate as deposit for a **sales order**. These tenders are not supported by NetSuite ERP for a sales order deposit. If taken as a deposit, any remaining card or certificate balance will become unusable on NSPOS registers.

To use a NetSuite gift card/certificate in a split-tender payment:

Split tender is when the customer provides more than one payment type, such as a gift card and a credit card or cash. Normally split tender is used when the gift card or certificate balance is not enough to pay the full amount due.

1. Scan or search for items and add them to the journal.
2. Tap **Amt Due**.

   The amount due should be larger than the gift card or certificate balance in these steps.
3. Tap **Gift Card** as the tender.
4. Enter the amount to pay from the card or certificate.
5. Receive the customer's payment.
   - If gift card, have the customer swipe it in the PIN pad or you can enter the card number.
   - If gift certificate, enter the authorization code.
6. Tap the additional tender, such as **Cash**.
7. Enter the amount to pay.
8. Receive the customer's payment.
9. Continue as needed until the amount paid is equal to or greater than the amount due.

> ❌ **Warning:** Do not accept a gift card or gift certificate as deposit for a **sales order**. These tenders are not supported by NetSuite ERP for a sales order deposit. If taken as a deposit, any remaining card or certificate balance will become unusable on NSPOS registers.

> ℹ️ **Note:** Customers can use two different gift cards or certificates to pay in a split-tender transaction. However, they cannot use the same gift card or certificate twice in a transaction.

> ⚠️ **Important:** You cannot add funds to an existing NetSuite gift card or certificate. If a customer makes a **return** for a transaction paid by card or certificate, the cashier can return the funds either in a new card or certificate, or as cash.

Sell an External Authorized Gift Card

Follow these steps to sell a gift card issued by an authorized third-party. These are regular inventory items that you add to a transaction similar to physical items purchased at your register.

To sell an external gift card:

1. Tap **Sell Authorized Gift Card** or **Issue Authorized Gift Card**.
2. At the **Issue Gift Card Amount** prompt, enter the value of the gift card.
3. If prompted **Does this Gift Card need to be activated?**, tap **Yes**.
4. At the **Please slide Gift card** prompt, swipe the card or enter the card **Number**.

5. Tap **Enter** or tap the green check mark.

6. Hand the gift card to the customer; it is activated and ready to use.

Check External Authorized Gift Card Balance

Follow these steps to get the balance of a external gift card.

To find the balance on an external gift card:

1. Tap **Authorized Gift Card Balance**.

2. At the **Please Slide Gift Card** prompt, swipe the gift card or enter the card **Number**.

3. Tap **Enter** or tap the green check mark.

   NSPOS displays the available balance.

Cash out a Gift Card

Depending on your store's policy, customers can receive cash for their gift card balance. Generally the balance must be more than $10.00, but your store's policy may vary.

To cash out a gift card.

1. Tap **Cash out Gift Card**.

2. Swipe the card or enter the gift card **Number**.

3. Tap **Enter** or tap the green check mark.

   The gift card balance appears as change due.

Sales Orders

NetSuite POS sales orders are a method for helping customers purchase items that are handled differently from your regular shelf items. You can use sales orders to process items held in your warehouse instead of your stores, or sell services such as installations, construction or cleaning. Some retailers use sales orders to provide custom items that are assembled on demand, such as shirts with personalized lettering.

If your store policy allows it, sales orders provide a way for customers to purchase items using one or more partial payments. The total amount due must be received when the order is fulfilled.

- Workflow – Open, Select, Order, Pay, Fulfill
- Sales Orders in NetSuite ERP
- Offline Mode
- Sales Order Tasks
  - Create a Sales Order
  - Add Partial Payment for an existing Sales Order
  - Edit Items in a Sales Order
  - Fulfill and Invoice some Items in a Sales Order
  - Fulfill and Invoice all Items in a Sales Order
  - Cancel a Sales Order
- Using Sales Order Custom Processes
  - Restrict Editing
  - Require Fulfillment before Invoicing
  - Fulfillment and Invoicing as Separate Tasks

## Workflow – Open, Select, Order, Pay, Fulfill

The process occurs over five or more steps, depending on if the customer makes more than one payment.

1. Open Sales Order mode.
2. Select the Customer.
3. Add one or more Items.
4. Accept partial or full payment.
5. Fulfill the order when items are ready.

Sales Orders in NetSuite ERP

NetSuite ERP includes sales order functionality. In standard online mode, orders made at the register upload to NetSuite ERP immediately. Your company can use NetSuite ERP to manage orders received over the phone, by email or through your website. Changes made in NetSuite ERP replicate down to the registers in your network.
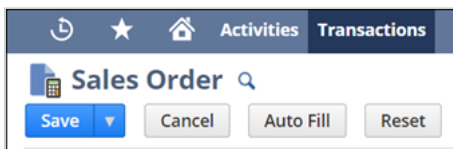

For information on handling sales orders in NetSuite ERP, see the help topic Sales Orders in the NetSuite Help Center. Log into NetSuite before clicking the link.

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Offline Mode

NetSuite POS supports offline mode for managing sales orders. Offline mode ensures that sales associates can manage new orders, make changes to existing orders and receive payments even if the NetSuite POS/NetSuite ERP connection is temporarily down. After the connection is restored, changes made in offline mode upload to NetSuite ERP with the next synchronization cycle.

✔️ **Tip:** If you do not see an existing sales order, tap **Show Offline** in the **Find** window.
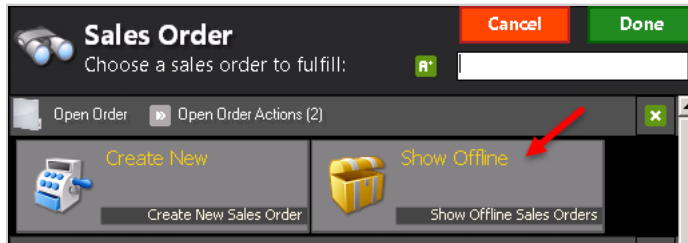
Sales Order Tasks

The following are common tasks for managing sales order transactions in NetSuite POS. Note that many retailers have button layouts unique to their business, so your **Sales Order** button may be in a different location on your registers.

- Create a Sales Order
- Add Partial Payment for an existing Sales Order
- Edit Items in a Sales Order
- Fulfill and Invoice some Items in a Sales Order
- Fulfill and Invoice all Items in a Sales Order
- Cancel a Sales Order

ℹ️ **Note:** Before opening sales order mode, you must **complete or suspend any open sales transactions** displayed in the journal.

❌ **Warning:** Do **not** perform an item **Return** while creating or updating a **sales order**. Making Returns during a sales order can result in an error that requires restarting NetSuite POS on the register.

Create a Sales Order

Follow these steps to set up the order. Note that your sales order buttons may be in a different location.

❌ **Warning:** **Do not accept a Gift Card or Certificate as deposit** for a sales order. It will cause any remaining card or certificate balance to be unusable on any NetSuite POS register.

To create a sales order:

1. Complete any open sales transactions.
2. Tap **Sales Orders**.

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Your Sales Orders button may be under **Other Functions** or in a custom location.

3. Tap **Sales Order Mode**.
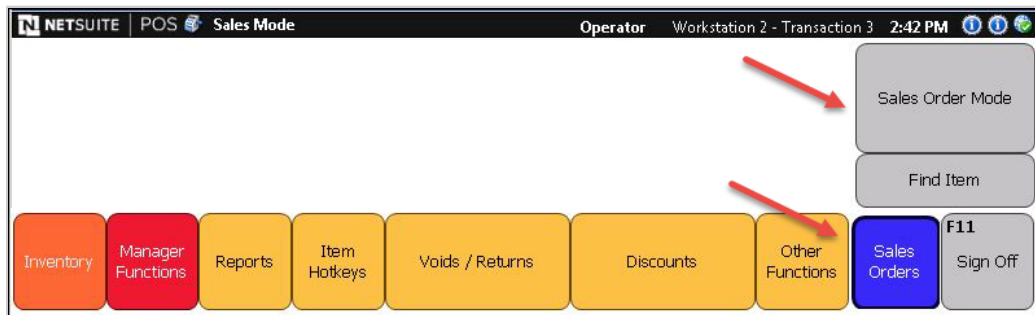
4. Search for the **Customer** by entering any part of their name in the search field.

- If needed, tap the ▣ icon to open a keyboard.
- Tap **Create Customer** to add a new customer.
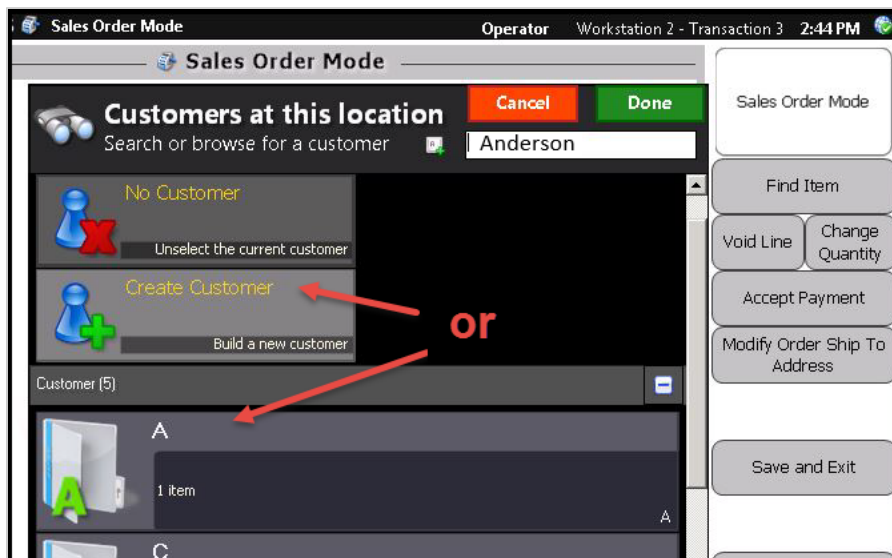
5. Tap the customer **Name**.

6. Tap **Create New** sales order.

7. Locate the **Item** to order. You can scan a barcode or search using **Find Item**.

To search for the item:

1. Tap **Find Item**.

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2. Enter any portion of the item name or ID, or drill into a category.

3. Tap the item **Name**.

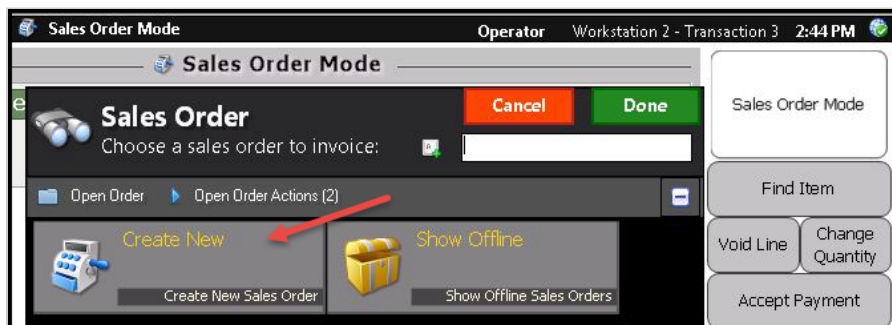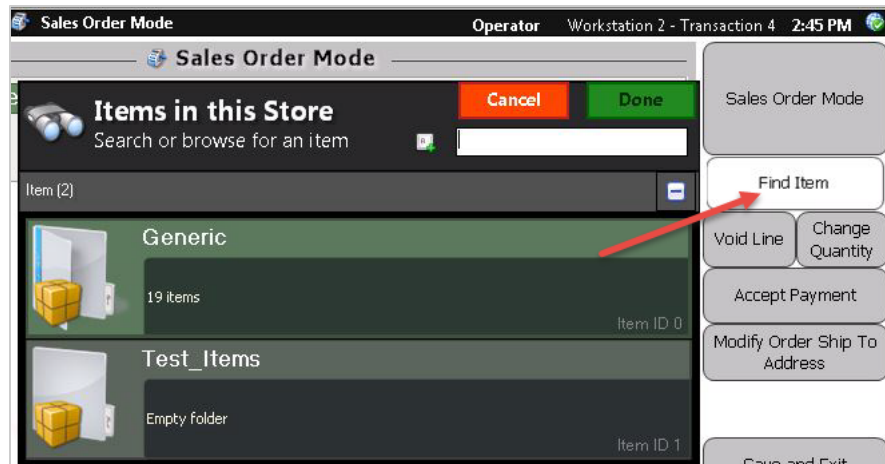> ✅ **Tip:** To go back while drilling into an item list, tap the word **Item** 🗂 at the top left in the window.

8. For more than one of the item, tap **Change Quantity**.

9. To add another item, scan a barcode or tap **Find Item**.

10. Shipping orders use the customer address on file. To verify or change the address, tap **Modify Order Ship to Address**.

11. Tap **Amt Due** or **Accept Payment**. This can be the initial deposit or payment in full.
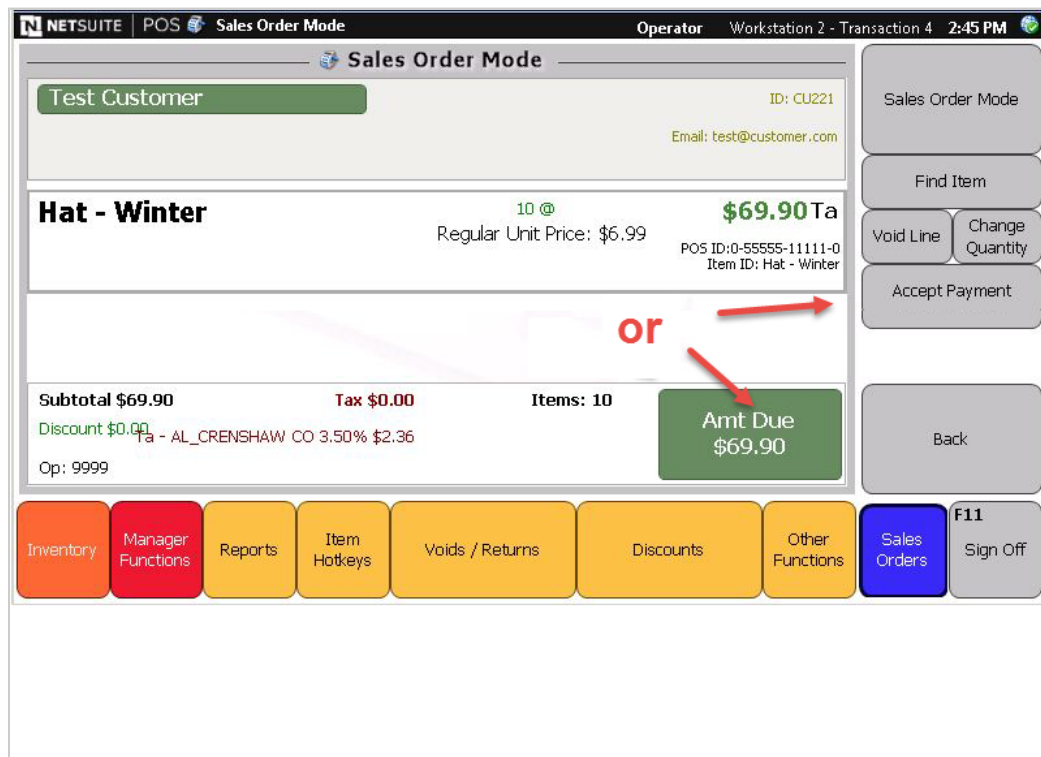
12. Tap the payment method.

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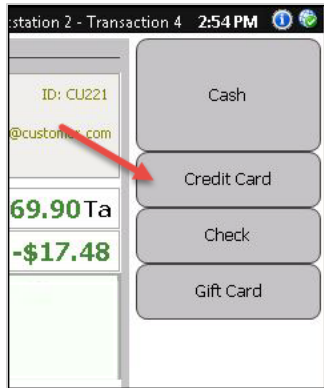
13. Enter the amount to pay.

    The initial deposit displays in the payment window. You can increase this as needed, up to the full amount due.
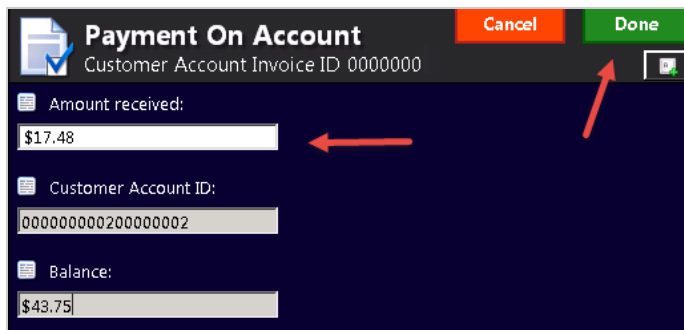
14. Tap **Done**.

15. Enter the payment amount and tap **Enter** or the green check mark.
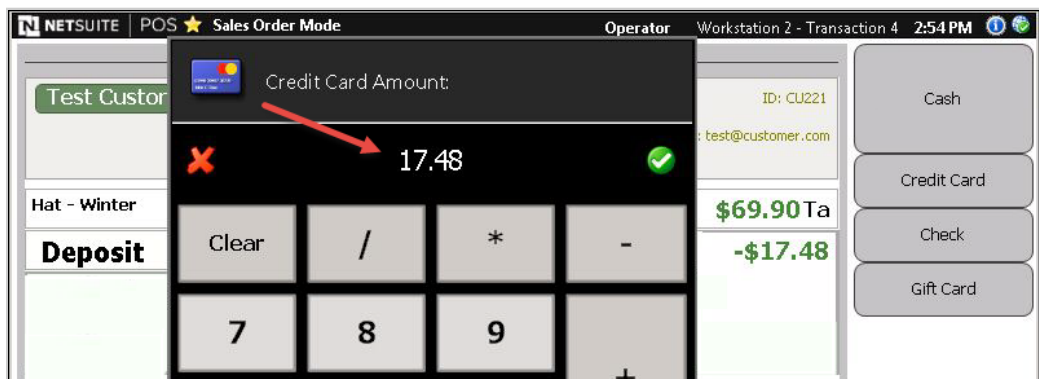
16. Accept the payment. If credit or debit card, ask the customer to swipe their card.

17. Give customer their receipt.

Split Tender Payments on Sales Orders

This topic applies to **NSPOS 2017.1** or greater. Otherwise, split tender for Sales Orders is not available.

Split tender payments are when a customer uses more than one payment type to tender-out a single transaction. Customers can use any combination of cash, credit cards and debit cards as payment, but it is important that you do not make any changes to the order between accepting payment types.

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> ⚠️ **Important:** Making changes between accepting the first and subsequent forms of payment can cause the Sales Order to error. Changes to avoid during payment include adding items, adjusting a price or adding a discount. All changes to the order should occur before taking payment or after the payment is complete.

To accept Split Tender Payments for Sales Order Deposits:

1. Create the sales order.
2. Tap **Amt Due** or **Accept Payment**.
3. Tap the first tender type, such as **Cash**.
4. For **Amount received**, adjust the total amount to be paid (if needed) and tap **Done**.

   The total payment should be at least the minimum deposit shown, up to the full amount.

5. Enter the first tender amount and tap **Enter** or the green check mark.

6. Tap the second tender method.

7. Enter the second tender amount.

8. Tap and enter additional tenders as needed to complete the deposit.

9. NSPOS prints a receipt when the deposit is paid in full.

Add Partial Payment for an existing Sales Order

If you store allows partial payments, follow these steps to accept a payment that reduces the total amount owed.

To accept partial payment for a sales order:

1. Complete any open sales transactions.

2. Tap **Sales Orders**.

   Your Sales Orders button may be under **Other Functions** or in a custom location.

3. Tap **Sales Order Mode**.

4. Search for the **Customer** by entering any part of their name in the search field.

5. Tap the customer **Name**. Existing sales orders display.

6. Tap the sales order to pay.

7. Tap **Edit**.

8. Tap **Amt Due** or **Accept Payment**.

9. Tap the payment method.

10. Enter the amount to pay.

11. Accept the payment. If credit or debit card, ask the customer to swipe their card.

12. Give customer their receipt.

Edit Items in a Sales Order

Follow these steps to adjust the items in an existing order. You can add items, remove items or change item quantities.

> ℹ **Note:** You cannot **exchange** one item through a return for another item until the entire sales order is fulfilled.

> ⊗ **Warning:** Changing a sales order in the main NetSuite online application while also changing it at a register that is currently offline will cause the order to error.

To edit items in a sales order:

1. Complete any open sales transactions.

2. Tap **Sales Orders**.

   Your Sales Orders button may be under **Other Functions** or in a custom location.

3. Tap **Sales Order Mode**.

4. Search for the **Customer** by entering any part of their name in the search field.

5. Tap the customer **Name**. Existing sales orders display.

6. Tap the sales order to edit.

7. Tap **Edit**.

8. Edit the order:

   ▪ To add an item, scan a barcode or tap **Find Item**.

   ▪ To remove an item, tap the item to expand it. Tap **Void Line**.

   ▪ To change the amount of an item, tap the item to expand it. Tap **Change Quantity**.

9. Tap **Save and Exit**.

> ⓘ **Note:** If prompted for additional payment, tap **Amt Due** or **Accept Payment** and process the payment. The minimum amount required displays in the payment window.
>
> Any refund due to the customer displays in parenthesis ( ).

Fulfill and Invoice some Items in a Sales Order

If some items are ready for pickup before others, you can fulfill just the available items. The sales order remains open for fulfillment of the remaining items later. Fulfilling includes invoicing for the amount due.

To fulfill some items:

1. Complete any open sales transactions.

2. Tap **Sales Orders**.

   Your Sales Orders button may be under **Other Functions** or in a custom location.

3. Tap **Sales Order Mode**.

4. Search for the **Customer** by entering any part of their name in the search field.

5. Tap the customer **Name**. Existing sales orders display.

6. Tap the sales order to partially fulfill.

7. Tap **Fulfill**.

> ⓘ **Note:** For NetSuite POS **2017.1**, the **Fulfill** button will show **Edit or Invoice**. If your business requires fulfillment before you can accept full payment, see Require Fulfillment before Invoicing.

8. Tap the first item you do **not** want to fulfill now.

9. Tap **Void Line**.

10. Enter the quantity of the item to temporarily void.

11. Tap **Fulfill Later**.

12. Repeat for any other items to fulfill later.

13. Tap **Amt Due** or **Accept Payment**.

14. Tap the payment method. The minimum amount required displays in the payment window.

15. Enter the amount to pay.

16. Accept the payment. If credit or debit card, ask the customer to swipe their card.

17. Give customer their receipt.

18. Provide fulfilled items to the customer.

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> ℹ️ **Note:** You cannot **exchange** one item through a return for another item until the entire sales order is fulfilled.

Fulfill and Invoice all Items in a Sales Order

When the items arrive and the customer is ready to receive the merchandise, follow these steps to fulfill the order. Fulfilling includes invoicing for the amount due.

To fulfill all items:

1. Complete any open sales transactions.
2. Tap **Sales Orders**.

   Your Sales Orders button may be under **Other Functions** or in a custom location.
3. Tap **Sales Order Mode**.
4. Search for the **Customer** by entering any part of their name in the search field.
5. Tap the customer **Name**. Existing sales orders display.
6. Tap the sales order to fulfill.
7. Tap **Fulfill**. The payment amount required displays under **Amt Due**.

   > ℹ️ **Note:** For NetSuite POS **2017.1**, the **Fulfill** button will show **Edit or Invoice**. If your business requires fulfillment before you can accept full payment, see Require Fulfillment before Invoicing.

8. Tap **Amt Due** or **Accept Payment**.
9. Tap the payment method.
10. Enter the full amount needed to complete the order.
11. Accept the payment. If credit or debit card, ask the customer to swipe their card.
12. Give customer their receipt.
13. Provide items to the customer.

Cancel a Sales Order

You can cancel an entire order if the customer requests the cancellation and the request meets your store policy. This is done by opening the order and voiding each item. The process typically requires refunding money the customer has paid towards the order.

To cancel a sales order:

1. Complete any open sales transactions.
2. Tap **Sales Orders**.

   Your Sales Orders button may be under **Other Functions** or in a custom location.
3. Tap **Sales Order Mode**.
4. Search for the **Customer** by entering any part of their name in the search field.
5. Tap the customer **Name**. Existing sales orders display.
6. Tap the sales order to cancel.
7. Tap **Edit**.

8. Tap to expand the first item to void.

9. Tap **Void Line**.

10. Enter the item quantity to void.

11. Tap **Cancel**.

12. Tap the next item, click **Void Line** and **Cancel**.

13. If the **Amt Due** shows an amount in parenthesis, refund the customer their deposit. For example, ($9.99).

Using Sales Order Custom Processes

You company policies might set up customizations that restrict or change what actions can occur at the register.

- Restrict Editing
- Require Fulfillment before Invoicing
- Fulfillment and Invoicing as Separate Tasks

Restrict Editing

Your company can disable the register option to edit which items are included in a sales order. If disabled, associates can create sales orders and take payment, but all edits must be performed in NetSuite ERP. This is useful for when sales order item-handling is performed away from the store, such as in a warehouse.

Require Fulfillment before Invoicing

Traditionally, cashiers can invoice and take payment for all items in a sales order, even if some items are not immediately available for fulfillment. However, NSPOS includes the option to restrict invoicing to fulfilled items only. In sales orders with multiple items, the cashier can invoice the fulfilled items, but the order remains open until all items are fulfilled. An initial deposit is still required to open the order.

Requiring fulfillment before invoicing is useful for deliveries, where some localities prohibit invoicing until the order has shipped. It also reduces the chance of having to refund an invoice because the materials required to fulfill the order are not on hand.

Fulfillment and Invoicing as Separate Tasks

In addition to requiring fulfillment before invoicing, retailers can split the fulfillment and invoicing process into separate tasks. Fulfillment is performed using a custom button called **Sales Order Fulfillment** or something similar. This method is typically used when orders are placed in the store but fulfilled at a warehouse, requiring confirmation that the item is ready before fulfilling it. Often, the fulfillment button will be restricted to manager roles and above.

Some businesses might restrict the fulfillment button to headquarters or the back office. This prevents fulfilling items too soon, such as when a shopper has three days to cancel an order for a custom-built item. Your business will wait to fulfill the order until the cancellation period has passed.

One option is to not set up a button on an NSPOS register. Instead, fulfillment happens by logging in to NetSuite ERP and going to Transactions > Sales > Enter Sales Orders > List > View.

For information on handling sales orders in NetSuite ERP, see the help topic Sales Orders in the NetSuite Help Center. Log into NetSuite before clicking the link.

> **ℹ Note:** If all fulfillment is performed at a warehouse or other facility using NetSuite ERP only, it is not necessary for the administrator to set up a fulfillment button on NSPOS registers.

Using the Sales Order Fulfillment button requires different processes for completing sales orders. These tasks are described in the following steps.

Considerations when Fulfillment is separate from Invoicing

- Fulfillment mode does not display prices.
- You cannot edit fulfillment items at the register. Editing must be performed in NetSuite ERP.
- You can change fulfillment quantities at the register by tapping the **Change Quantity** button.
- You can only **Invoice** full payment for fulfilled items.
- To accept additional deposit payments, tap **Edit**, not Invoice. Your customers have the option to pay the full amount when requesting a new sales order.

To fulfill all items using Sales Order Fulfillment:

1. Complete any open sales transactions.
2. Tap **Sales Orders**.

   Your Sales Orders button may be under **Other Functions** or in a custom location.
3. Tap the custom button **Sales Order Fulfillment**. Your setup might use a different name for this button.
4. Search for the **Customer** by entering any part of their name in the search field.
5. Tap the customer **Name**. Existing sales orders display.
6. Tap the **Sales Order** to fulfill.
7. Tap **Amt Due** or **Accept Payment**.

   > **⚠ Important:** The amount will show $0.00 due. No money will be taken during fulfillment.

8. Tap **Cash**.
9. Leave the amount as $0.00 and tap **Enter**.

   The order is fulfilled and can be invoiced using the next set of steps. A confirmation receipt prints.

To invoice a sales order after fulfillment:

1. Complete any open sales transactions.
2. Tap **Sales Orders**.

Your Sales Orders button may be under **Other Functions** or in a custom location.

3. Tap **Sales Order Mode**.

4. Search for the **Customer** by entering any part of their name in the search field.

5. Tap the customer **Name**. Existing sales orders display.

6. Tap the **Sales Order** to invoice.

7. Tap the payment method.

8. Enter the full amount needed to complete the order.

9. Accept the payment. If credit or debit card, ask the customer to swipe their card.

10. Give customer their receipt.

To partially fulfill and invoice:

You can fulfill and take payment for a subset of items in a sales order. First fulfill the desired items and then invoice them.

1. Complete any open sales transactions.

Fulfill Partial Items

2. Tap **Sales Orders**.

Your Sales Orders button may be under **Other Functions** or in a custom location.

3. Tap the custom button **Sales Order Fulfillment**. Your setup might use a different name for this button.

4. Search for the **Customer** by entering any part of their name in the search field.

5. Tap the customer **Name**. Existing sales orders display.

6. Tap the **Sales Order** to fulfill.

7. Select the items that are not ready to be fulfilled and tap **Void Line**.

Voided items will display the next time you open the order. They are not deleted. In this example we are fulfilling the **Hat – Winter** item only.

8. Tap **Amt Due** or **Accept Payment**.

> ⚠ **Important:** The amount will show $0.00 due. No money will be taken during fulfillment.

9. Tap **Cash**.

10. Leave the amount as $0.00 and tap **Enter**.

The subset of items are fulfilled and can be invoiced.

Invoice Partial Items

11. Tap **Sales Orders**.

12. Tap **Sales Order Mode**.

13. Search for the **Customer** by entering any part of their name in the search field.

14. Tap the customer **Name**. Existing sales orders display.

15. Tap the **Sales Order** to invoice.

16. You are prompted to invoice the partial fulfillment. Tap **Yes**.
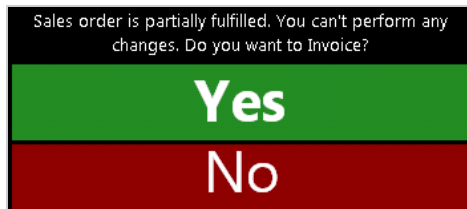
17. Tap **Amt Due** or **Accept Payment**.

18. Tap the payment method.

19. Enter the amount paid.

20. Accept the payment. If credit or debit card, ask the customer to swipe their card.

21. Give customer their receipt.

Work with Customer Information

ⓘ **Applies to:** NetSuite Point of Sale (NSPOS)

NetSuite Point of Sale (POS or NSPOS) includes valuable features that help you manage customer data and deliver customer care before, during and after the sale. Assigning a customer to a sales transaction is not always required, but many businesses use customer information to enrich the sales associate's interaction at the point of sale.

Why add Customer Information?

Every new customer is a potential repeat customer. Having purchase history and details easily available can help sales associates provide an interactive, personal experience. For growing your business, you can discover who your customers are and what they prefer. You can:

- Save customer contact information, including their physical address, email address and telephone number.
- Enter notes about special needs or wants.
- Assign organizations or groups to track common customer types and validate purchase requirements.
- Use customer history for targeted marketing campaigns.

Some business processes may require customer information. For warranty purposes, an automobile parts store may log all purchases against a customer name, account or telephone number. A membership organization such as a wholesale outlet may need to verify a customer's member status before conducting business or extending member discounts.

Use the tasks in this section to locate and work with customer profiles. Also called customer records, profiles contain the customer's information.

- View and Edit a Customer Profile
- Create a Customer Profile
- Delete a Customer Profile (Tech Support Required)
- Assign Customer to Organization or Group
- View a Customer's Last Five Transactions
- Run a Customer Profile Report

> ⓘ **Note:** When using Find or Edit to select a customer, NetSuite limits the search to customers in the same subsidiary as the store. Subsidiaries are different divisions or companies under a corporate parent.

View and Edit a Customer Profile

Follow these steps to display and make changes to an NSPOS customer profile. A customer profile lists contact details, including name and address, telephone numbers, email address and other information. Use the Customer Notes field to enter information that may be helpful in future transactions.

The customer you find and edit is automatically added to any sales transaction in progress.

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To view and edit a customer profile:

1. Tap **Edit Customer**.

   If a customer was already selected, their profile opens. Skip the next step.

2. Locate the customer by drilling into alphabetized folders or by entering search criteria, such as their first or last name.

   Search results display after entering three characters. Searches are not case sensitive and match any part of a name. If you do not have a keyboard, tap the green **Show Keyboard** button.

3. Tap to open the profile.

4. Update the customer's information.

5. Tap **Done**.

Create a Customer Profile

At a new location, you might need to create new customers in NSPOS quickly. However, over time, the majority of customers will be repeat customers. **You should attempt to find the original customer profile first.** It is easier to find a partially complete profile and edit it than to create a new customer all over again. This reduces duplicate and near-duplicate customer profiles created by different sales associates for the same customer.

When you are certain the customer does not already exist in NSPOS, create a new profile.

To create a new customer:

1. Tap **Find Customer** or **Edit Customer**.

2. Tap **Create Customer**.

3. Enter the customer's **First Name** and **Last Name**.

4. Complete other fields using the information available. Required fields display an arrow , but optional information is also valuable.

5. Tap **Done**.

Delete a Customer Profile (Tech Support Required)

Because transaction history might be associated with a customer, you cannot delete a customer profile from an NSPOS register.

Your administrator can delete a customer in NetSuite ERP, but that only inactivates the customer in NSPOS. To remove a customer and their associated data permanently from your registers, please contact NetSuite Technical Support.

Assign Customer to Organization or Group

Follow these steps to assign a customer to an organization, such as a company or service organization, or to a group such as a discount tier or members-only buyer's club. For example, a uniform outlet

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store might set up the local hospital as an organization to track their purchases. A school club can be assigned to a discount group. The steps below describe updating an existing customer. However, you can do this when creating a customer.
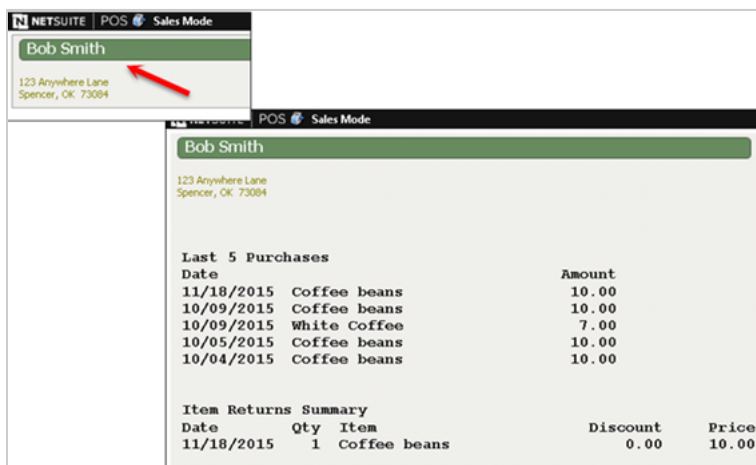
Your system administrator is responsible for customizing the organizations and groups in your NSPOS setup.

To assign a customer:

1. Tap **Edit Customer**.

   If a customer was already selected, their profile opens. Skip the next step.

2. Locate the customer by drilling into alphabetized folders or by entering search criteria, such as their first or last name.

   Search results display after entering three characters. Searches are not case sensitive and match any part of a name. If you do not have a keyboard, tap the green **Show Keyboard** 🔲 button.

3. Tap to open.

4. Tap **Browse** by the **Organization** or **Customer Group** field to search.

5. Select the **Organization** or **Group**.

6. Tap **Done**.

View a Customer's Last Five Transactions

To view the customer's past five transactions, double-click or tap the customer's name. Tap anywhere on-screen to return to the transaction.

Run a Customer Profile Report

This report lists all transaction activities for a customer starting from the date they were first added to NSPOS. You will usually run it after selecting a customer, but you can run it outside of a transaction if you want to manually enter a Customer ID.

Use the report options to run it for a specific date range, print the results, or save and export it in CSV, HTML or other file format.

Customer Profile

Customer Info

Bob Smith

123 Anywhere Lane

Spencer OK 73084

Phone: 555-555-5555

Email: jdemo@demo.com

First Visit: 10/4/2015   Last Visit: 11/18/2015

9999   9999

Sales

			Top 3 Associates		
Last 3 Months	$67.00	5	Operator Administrator	$67.00	5
Last 4 - 6 Months	$0.00	0	Top 3 Associates Total	$67.00	5
Last 6 - 12 Months	$0.00	0			
Life Total	$67.00	5			

⊟ Items Purchased	Action	Unit Retail	Unit Discount	Net Sales	Units
⊟ 2015				$67.00	5
2015 November				$20.00	2
11/18/2015 American_location_02 Trx #3 Op: Operator				$10.00	1
Coffee beans	Sale	$10.00	$0.00	$10.00	1
11/18/2015 American_location_02 Trx #8 Op: Operator				$10.00	1
Coffee beans	Return	$10.00	$0.00	$10.00	1
2015 October				$67.00	5
10/4/2015 American_location_03 Trx #10 Op: Operator				$40.00	2
Coffee beans	Sale	$10.00	$0.00	$10.00	1
Coffee Bin	Sale	$30.00	$0.00	$30.00	1
10/5/2015 American_location_03 Trx #13 Op: Operator				$10.00	1
Coffee beans	Sale	$10.00	$0.00	$10.00	1
10/9/2015 American_location_03 Trx #3 Op: Operator				$17.00	2
Coffee beans	Sale	$10.00	$0.00	$10.00	1
White Coffee	Sale	$7.00	$0.00	$7.00	1
Period Total				**$87.00**	**7**

Ver 20100509 Customer Profile

To run a Customer Profile Report:

1. Use **Find Customer** to select the customer.

   You can optionally skip this step to enter a **Customer ID** from the report window.

2. From the Main button bar, tap **Reports**.

3. Tap **Customer Profile**. The customer's report displays.

4. To view details, tap the + sign by the **Items Purchased** and the year.

5. To show transactions within a date range:

   a. For **Start Date**, clear the **Null** check box and select a date.

   b. For **End Date**, clear the **Null** check box and select a date.

   c. Tap **View Report**.

6. To print or save and export the report, choose from the options at the top.

7. Tap **X** in the upper right to return to the journal window.

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Report Fields

Field	Description
Customer Info	Basic customer information, first / last visit dates on which they made a transaction, and the sales associate (operator) ID logged into the register for those transactions.
Sales	Total customer sales for periods over the last year and over the customer lifetime (since they were added to the system).
Top 3 Associates	Sales associates that performed the highest-value sales transactions for the customer over a month and the number of units (items) included.
Items Purchased	Date, location, transaction number (Trx#), sales associate and items purchased, grouped by year and month. Tap + to expand a section.
Action	Type of transaction: Sale or Return.
Unit Retail	Item's every day retail price.
Unit Discount	Any discount amount applied to the retail price.
Net Sales	Unit Price minus Unit Discount.
Units	Number of items in each transaction, sub-totaled by year and month.
Period Total	Total value of all sales transactions over the reporting period Start and End Dates. If Null is checked for dates, this is the customer's lifetime net sales total.

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Till Management Tasks

ⓘ **Applies to:** NetSuite Point of Sale (NSPOS)

This topic guides you through performing NetSuite Point of Sale (NSPOS) till management tasks throughout a business day.

The physical portion of a till is also called a cash drawer, and is the drawer or cabinet in which cash payments are placed and change is removed. Most till management tasks are manual, such as entering the cash put into and removed from the drawer. These tasks are important for recording bank deposit amounts and determining any overages or shortages.

A business day represents the time from when a retail store starts its operations to when it ends them, as a continuous session. NSPOS uses start of day and end of day tasks to separate till activities into separate business days. The day does not have to match a calendar date or time range. If more than one cashier shift uses a register during a business day, then each cashier can be responsible for opening and closing the till for their shift within that day.

Typical Till Business Day

A business day starts with an authorized cashier or manager signing on to the terminal and entering the beginning till count. The beginning count records the denominations and amounts placed in the till as a float to provide change for the day's sales operations.

The cashier is then ready to ring up sales, process returns and perform other transactions. If the cashier runs short of the cash denominations needed to make change, they can get added funds through a drawer loan. If they have more cash in their till than allowed by store guidelines, they can make a drawer drop.

When the store closes to the public, the cashier or manager initiates the end of business day tasks by counting and settling the till. Any any cash overages or shortages are noted for further investigation. The cashier or manager then signs off and the business day is over.

- Start of Day – Enter Beginning Till Count
- During the Day – Make a Drawer Drop
- During the Day – Make a Drawer Loan
- During the Day – Make a Disbursement
- End of Day – Count and Settle Till

> ⚠️ **Important:** Depending on your store's rules and requirements, these tasks may be available only to store managers, shift managers, or other operators with higher-level roles.

> ⓘ **Note:** Because NSPOS is highly customizable, your store's procedures may vary.

Start of Day – Enter Beginning Till Count

Before starting any cash sales activity on an NSPOS register, the store manger or cashier will count and enter the beginning currency denominations placed in each register. This money is a float for making change throughout the day. Accurate reporting for identifying overages or shortages depends on ensuring beginning values are accurate.

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A beginning till count is generated every time the physical till tray is inserted or removed from a till cash drawer.

To enter the beginning till count:

1. In **Sales Mode**, complete all sales transactions.
2. Tap **Manager Functions**.

   If you do not see Manager Functions, press **Ctrl+F12** and search for `Start of Day`.
3. Tap **Start of Day**.
4. In the **Count Till** window, enter the count for each coin and bill denomination.

   > ℹ **Note:** Use the tab key to quickly move between fields.

5. Review the total **Cash Amount** on the right.
6. Tap **Done** when complete.

   The till is ready for the opening shift. Because NSPOS assigns the till to the shift, different cashiers can sign on and sign off to NSPOS using this till during the shift.

During the Day – Make a Drawer Drop

Also called a tender pickup, perform this to remove excess cash from an NSPOS till during a shift or business day. Besides keeping the drawer organized and manageable, making drawer drops reduces the risk of having large amounts of cash in registers throughout your store.

To make a drawer drop:

1. In **Sales Mode**, complete all sales transactions.
2. Tap **Manager Functions**.

   If you do not see Manager Functions, press **Ctrl+F12** and search for `Drawer Drop`.
3. Tap **Drawer Drop**.

   The cash drawer opens and the **Tender Pickup** window appears.
4. Remove cash as needed, entering the count for each coin and bill denomination removed.

   > ℹ **Note:** Use the tab key to quickly move between fields.

5. Review the total **Cash Amount** on the right.
6. Tap **Done**.
7. If prompted, select a **Pickup Reason Code**.
8. If applicable to the drop, complete the optional **Bank Deposit** form that appears.

During the Day – Make a Drawer Loan

When a cashier runs short of change during their shift, your cash office or back office can make a drawer loan to their NSPOS till. A drawer loan is also called a tender loan. Loans to a drawer are reconciled using your company's internal methods.

To make a drawer loan:

1. In **Sales Mode**, complete all sales transactions.

2. Tap **Manager Functions**.

   If you do not see Manager Functions, press **Ctrl+F12** and search for `Drawer Loan`.

3. Tap **Drawer Loan**. The cash drawer opens and the **Till Count** window appears.

   If you do not see Drawer Loan, press **Ctrl+F12** and search for `Drawer Loan`.

4. Remove cash as needed, entering the count for each coin and bill denomination removed.

   > ⓘ **Note:** Use the tab key to quickly move between fields.

5. Review the total **Cash Amount** on the right.

6. Tap **Done**.

During the Day – Make a Disbursement

Depending on your store's setup, you may also have the option to disburse cash from a till for small expenditures such as petty cash purchases of supplies or services.

Disbursements are typically performed for immediate needs vital to your store's operation, such as purchasing receipt paper or paying a cleaning service. Disbursements might also occur for expenses such as charitable donations. If the disbursement option is installed, you can select a Reason Code for tracking purposes.

To make a disbursement:

1. In **Sales Mode**, complete all sales transactions.

2. Tap **Other Functions**.

3. Tap **Disbursement**.

4. If prompted, sign in with your authorized credentials.

5. Find and select a **Reason Code**.

6. Enter the **Cash Disbursement Amount**.

7. Tap **Enter**.

8. Choose whether to print a receipt.

9. If printed, place the receipt in the location listed in your store's procedures, such as the cash drawer.

End of Day – Count and Settle Till

Perform these steps to count and settle each till at the end of a sales associate's shift. This creates a NetSuite business day of register transactions and provides the totals that determine any overage or shortage.

> ⚠ **Important:** By default, the End of Day process cancels and clears all suspended customer transactions.

Because your NSPOS administrator can customize the End of Day process with a variety of options, your store procedures might vary. For example, your administrator can set registers to not automatically cancel suspended transactions.

> ⓘ **Note:** Transactions from NSPOS sync to NetSuite ERP throughout the day, not just at End of Day.

To count and settle a till:

1. In **Sales Mode**, complete all sales transactions.

2. Tap **Manager Functions**.

   If you do not see Manager Functions, press **Ctrl+F12** and search for `End of Day`.

3. Tap **End of Day**.

4. Tap **Yes** for **Proceed with the End of Day Process?**

5. Depending on your setup, you may be prompted to select a **Count Till ID** for this or other workstations.

6. Tap **Yes** for **End Shift and Release Till <Till ID> for <Workstation ID>**.

   This ends the cashier's shift and closes the till.

   > ⓘ **Note:** Signing in again will open a new till.

7. Choose whether to **Print a Till Count Worksheet?**

   The Till Count Worksheet prints as a receipt on the receipt printer. The cash drawer opens and the **Count Till** window appears.

8. Enter the count for each coin and bill denomination.

   > ⓘ **Note:** Use the tab key to quickly move between fields.

9. Tap **Done** when complete.

10. Choose whether to **Print the Actual Till Counts?**

    This report lists the counted values for the till.

11. If prompted, choose whether to **Recount Till?** to confirm the count.

    The Sales Audit Report runs and appears when the count is complete. The cashier is signed off from NSPOS.

Review End of Day in NetSuite ERP

Follow these steps to review end of day settlements in the NetSuite application. This task may not be available to all users.

To review End of Day settlements:

1. Log in to NetSuite ERP.

2. Go to Transactions > Financial > Make Journal Entries > List.

3. Locate the desired entries by **Date**, **Account** or other column.

4. Tap **View**.

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