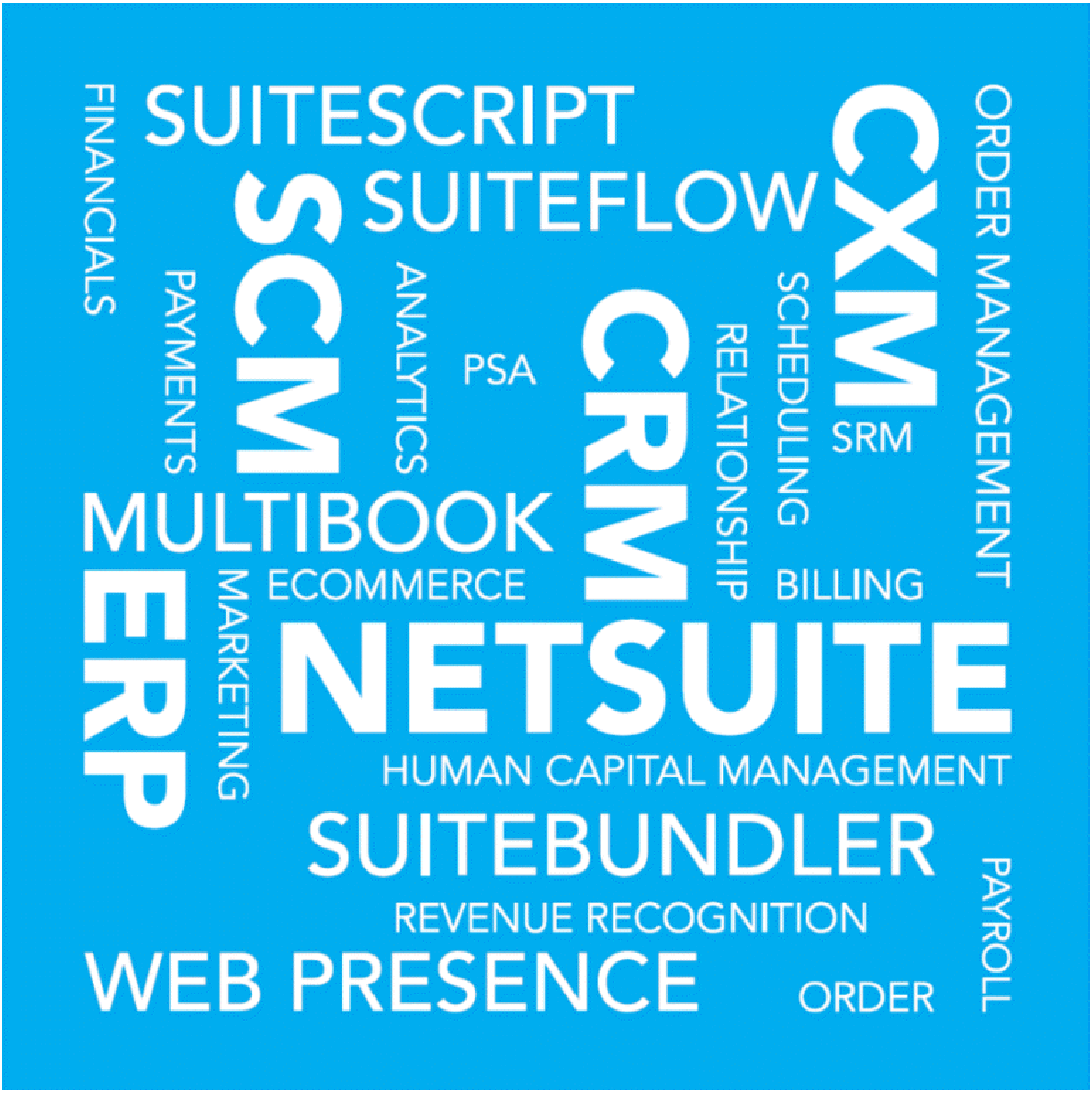
SuiteCommerce InStore User Guide



April 11, 2018

SCIS 2017.2.8

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SCIS User Guide Overview

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

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

Integration with NetSuite

SCIS is designed to integrate natively with NetSuite. The SuiteCommerce InStore SuiteApp is installed in your organization's NetSuite account. Sales associates use the secure SCIS POS application to access SCIS. All data used by SCIS is stored in and retrieved from NetSuite. This enables SCIS to leverage other NetSuite product areas, including ERP, ecommerce, and CRM.

Access to Customer Profiles

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

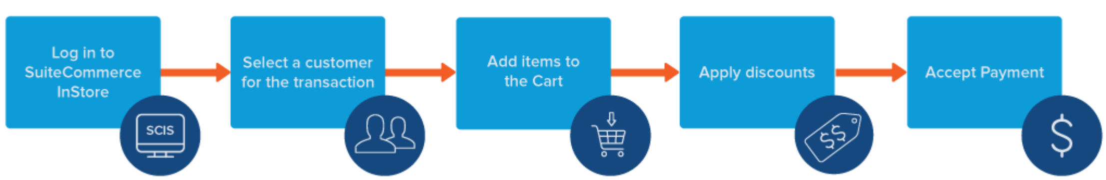
Roles and Permissions

As employees, sales associates are granted roles based on the custom roles added to NetSuite when SuiteCommerce InStore is installed. To log in to SCIS, each user enters login credentials based on the role assigned.

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

SuiteCommerce InStore Workflow

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



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1. **Log In to SuiteCommerce InStore.**

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

2. **Select a customer for a transaction.**

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

3. **Add items to the cart.**

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

4. **Apply discounts.**

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

5. **Accept payment.**

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

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

- Working with Gift Cards in SCIS
- Refunds, Returns, and Exchanges in SCIS
- Working with Credit Memos in SCIS
- SCIS Cash Drawer

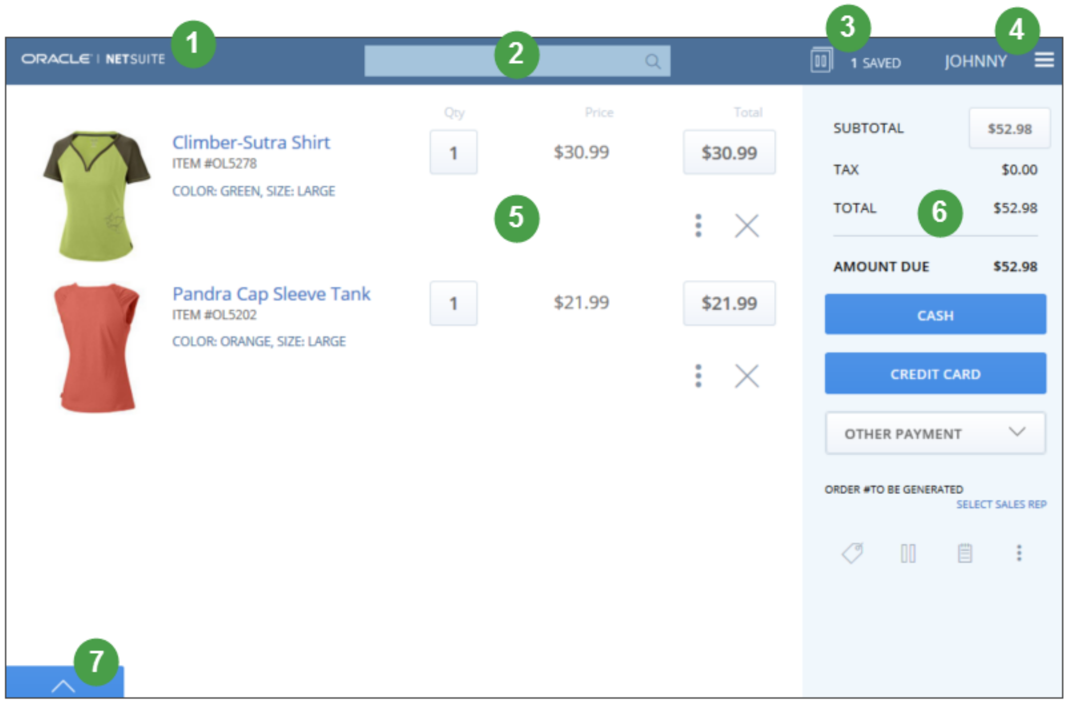
SuiteCommerce InStore User Interface

The following topics provide a general overview of the SuiteCommerce InStore (SCIS) user interface:

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

Main Application Page

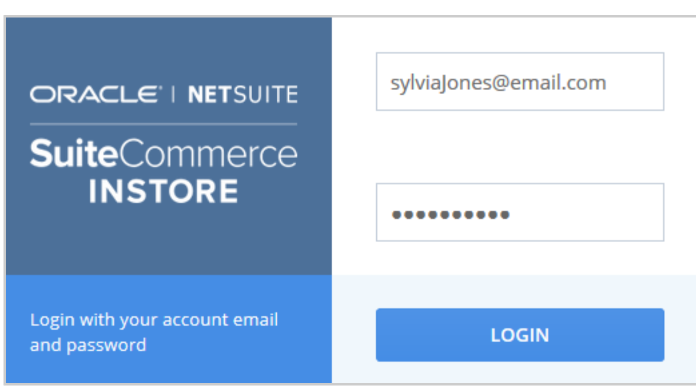
SCIS provides a touchscreen user interface. The following screenshot shows the user interface when performing a transaction.



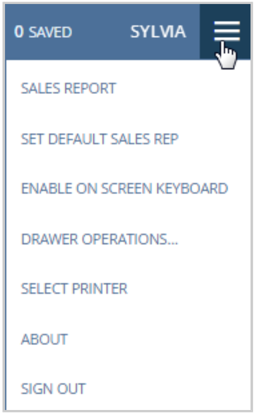
1. **Application Logo** – Appears differently, according to your installation of SCIS.
2. **Search Bar** – Enables you to search for customer profiles, items, and transactions. To use the search, enter the first few letters of a customer's first or last name, a product name, or the first numbers of a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

Login and User Menu

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



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



From the User Menu, you can do the following:

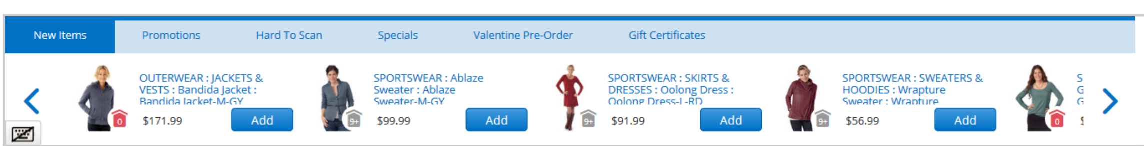
- View a report of your sales performance. For more information, see Viewing a Sales Report in SCIS.
- Set the default sales representative for this session or for all sessions. For more information, see Selecting a Sales Representative.
- Enable the on screen keyboard, so you can type on your tablet.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

QuickAdd Bar

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

- New Items
- Promotions
- Hard to Scan
- Special Offers
- Correlated Items

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



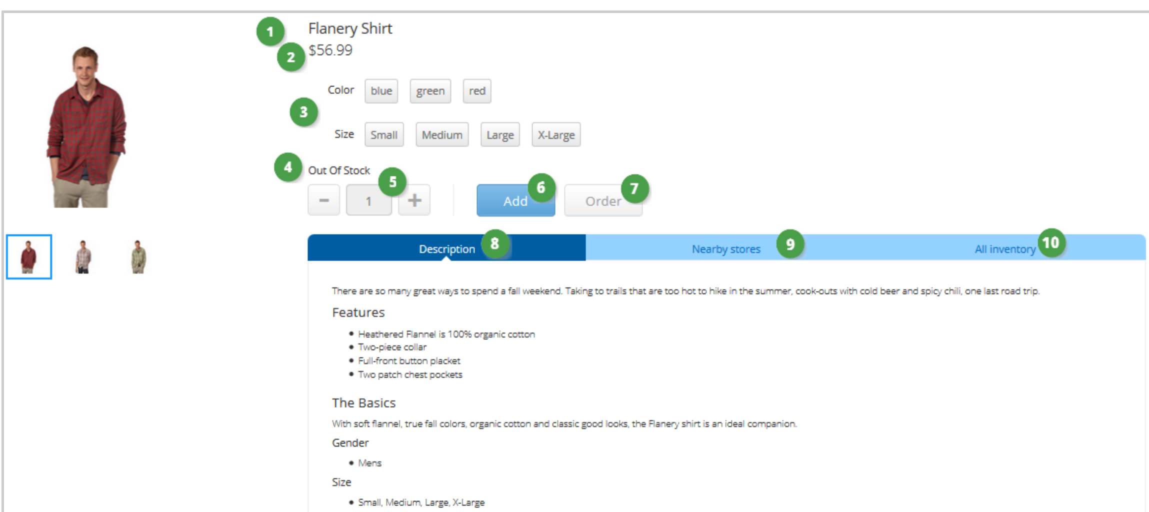
The Cart

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

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

Product Detail Page

On the product detail page you can view a detailed description, add an item to the cart, place an order for delivery, and view or enter ratings and reviews.



1. **Product Name** – Typically appears at the top of the product detail page.
2. **Price** – Price as configured on the item record in NetSuite.
3. **Product matrix options** – Matrix options are based on item record configuration in NetSuite.
4. **Inventory status** – Shows the quantity on hand at the location of the sales associate who is logged in.

5. **Quantity to add to cart** – Click the plus and minus buttons to set the quantity that should be added to the cart.
6. **Add to cart button** – Click Add to put items in the shopping cart for cash and carry transactions.
7. **Order button** – Click Order to place an order for delivery to the customer's address.
8. **Description** – Includes a detailed description of the item.
9. **Nearby stores** – Shows a list of the local stores.
10. **All inventory** – Shows a list of the inventory count across different locations.

Swipe to Refresh

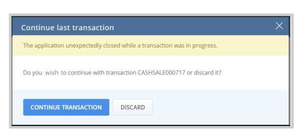
To refresh the application, in iOS, swipe from the left edge of the screen to expose the refresh menu. In Windows, write a cross (x) gesture on a tablet screen with two fingers. If you are using a laptop or desktop computer, write a cross (x) with the cursor. Use the refresh capability in SCIS if you encounter an issue. Issues can include connectivity, an application error, or a role or permission problem. Refreshing the application enables you to continue working or start troubleshooting.

Popup Windows for Log Out or Application Closure

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

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

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

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

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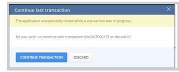
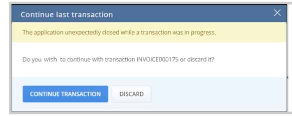
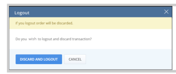
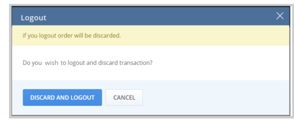
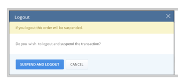
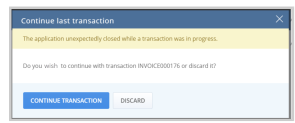
Action	Workflow Options	Popup Window	Avalara Workflow
payments applied. (1.b)			
Log out of SCIS with an order in progress and **no payments** applied. (2.a)	When the sales associate clicks Sign Out in the user menu, a pop-up is displayed. The sales associate is given the option to discard the order and log out or cancel signing out.	Without Avalara the following popup is displayed. 	If Avalara is activated and the **Submit on Update** setting on the SCIS Settings record, is checked, SCIS shows this pop-up.  After the sales associate logs in again, no modal is shown. The order was voided.
Log out of SCIS with an order in progress and **partial payments applied**. (2.b)	When the sales associate clicks Sign Out in the user menu, a pop-up is displayed. The sales associate is given the option to suspend the order and log out or cancel the log-out action and go back to the cart.	Without Avalara the following popup is displayed. 	

SuiteCommerce InStore Login

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

- Logging In
- Logging in with iOS Touch ID for SCIS
- Selecting a Printer

Logging In

To access SCIS, launch SCIS for iOS or SCIS for Windows. Then enter the login credentials provided to you by a manager or system administrator.

To log in to SuiteCommerce InStore:

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

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

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

Logging in with iOS Touch ID for SCIS

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

To log in with iOS Touch ID for SCIS:

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

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

Selecting a Printer

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

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

To select a printer:

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

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

For more information about choosing a printer when opening a shift, read Opening the Cash Drawer with SCIS.

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

Selecting a Sales Representative

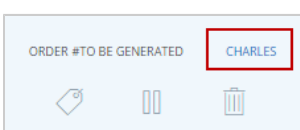
When performing a sales transaction in SuiteCommerce InStore (SCIS), you have the option to associate a sales representative with the transaction. In NetSuite, employees specified as Sales Reps can participate in commission plans. When you assign a sales representative to a transaction, this information is stored as part of the transaction record. The sales representative information can be used to determine commission or calculating sales metrics.

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

To select a sales representative:

1. Log in to SuiteCommerce InStore.
2. Click **Select Sales Rep** in the transaction summary.
3. Click the name of the sales representative you want to select.

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



To change the current sales representative:

1. Click the name of the current sales representative in the transaction summary.
2. Click the name of the new sales representative you want to select.

   Select **None** if you do not want to associate a sales representative with the transaction.

Manager Override

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

For example, a manager may be required to authorize the transaction when an item is voided from an order. In this case, an alert message requesting a SCIS Access Code displays preventing the sales associate from proceeding with the order. The sales manager must enter a SCIS Access Code in the alert box to allow the sales associate to proceed.

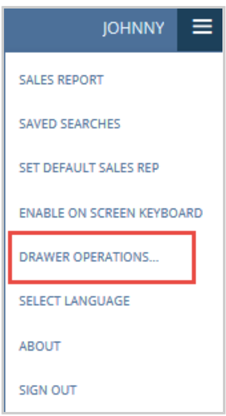
Note: The NetSuite administrator can enter a value for SCIS Access Code on the Custom subtab of the Employee record. SCIS Access Codes must be communicated to employees who are required to perform manager overrides.

SCIS Cash Drawer

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

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

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



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

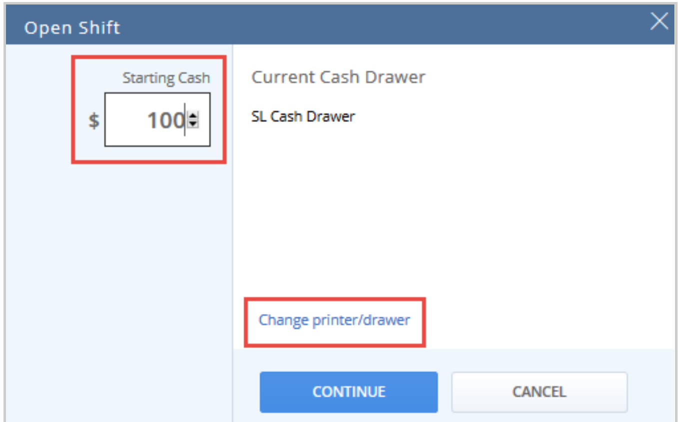
- Opening the Cash Drawer with SCIS
- Closing the Cash Drawer with SCIS
- Opening the SCIS Cash Drawer with No Sale

Opening the Cash Drawer with SCIS

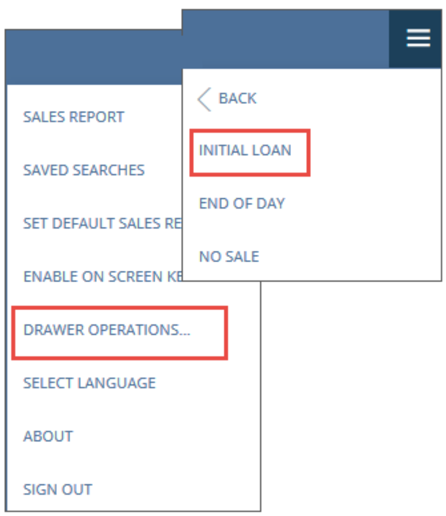
At the beginning of a shift, you receive a cash drawer. Before you enter any sales transactions, you must enter an **Initial Loan** or **Open Shift** transaction to record the amount in the cash drawer. During the shift, the original amount in the drawer is increased and diminished based on transactions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

Opening the drawer at the beginning of your shift:

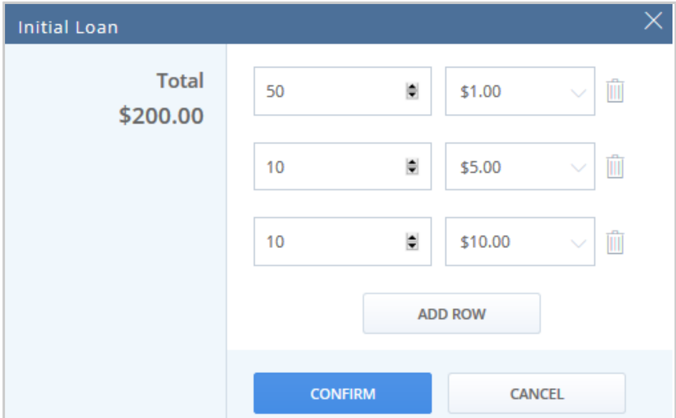
1. Log in to SuiteCommerce InStore.
2. If your store uses Advanced Cash Management, after entering your login credentials, enter the amount in the cash box and select a printer and cash drawer combination.



3. Touch **Continue** when you are finished.
4. If your store does **not** use Advanced Cash Management, use the Drawer Operations option in the User Menu to open the Initial Loan dialog window.



    a. In the User Menu, select **Drawer Operations...**
    b. Select **Initial Loan.**
    c. Enter the total amount for each cash denomination in the cash drawer.



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

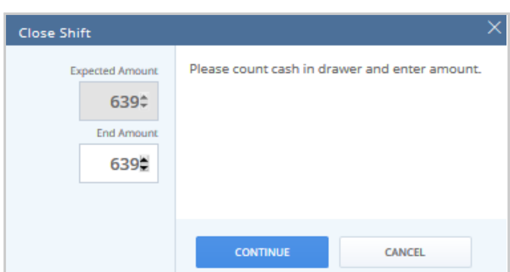
After logging in and opening the shift or submitting the initial loan, you can perform sales transactions. Each initial loan and open shift transaction is tracked in NetSuite. Each transaction you enter with SCIS includes your name on the receipt and on the transaction saved in NetSuite.

Closing the Cash Drawer with SCIS

At the end of each shift, the sales associate must enter the amount of cash that is in the cash drawer. The process of entering the End of Day or Close Shift transaction depends on whether or not your store uses Advanced Cash Management.

To enter a closing drawer transaction:

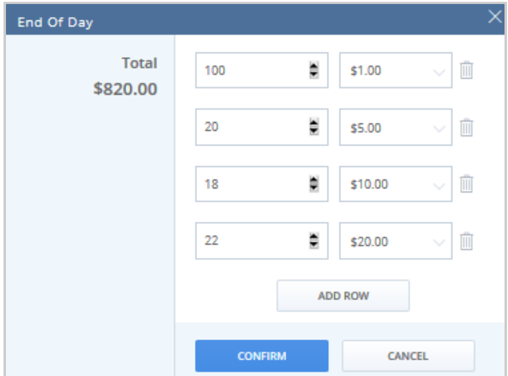
1. Open the **User Menu**.
2. Select **Drawer Operations....**
3. If your store uses Advanced Cash Management, do the following:
    a. Select Close Shift.
    b. Count the cash in the drawer.
    c. Enter the amount of cash in the drawer.

    > **Note:** If the amount in the cash drawer does not equal the expected amount, then you must enter a note to explain why.

    d. A Close Shift receipt is printed and then you are automatically logged out of SCIS.
4. If your store does not use Advanced Cash Management do the following:
    a. Select **End of Day**.

b. Enter the amount of cash in the drawer. There is a separate row for each denomination.



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

After you complete the End of Day or Close Drawer transaction, you are automatically logged out of SCIS. A system administrator can view your End of Day or Close Drawer transaction in NetSuite. If there is a difference between the amount in the cash drawer and the expected amount of cash based on the sum of all transactions that you entered, the discrepancy is displayed in NetSuite.

Opening the SCIS Cash Drawer with No Sale

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

Note: The No Sale option is not available in Advanced Cash Management.

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

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

Entering Transactions Using SuiteCommerce InStore

Entering a Sales Transaction in SCIS

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

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

- Adding Customers To Sales Transactions in SCIS
- Adding Items to a Sales Transaction in SCIS
- Adding a Serialized or Lot Numbered Item to an SCIS Order
- SCIS Store Pickup and Orders for Delivery
- Fulfilling Orders for Shipping and Pickup with SCIS
- Delete, Save, or Resume a Transaction in SCIS
- Adding Notes to Items and Transactions in SCIS
- Accepting Payments for Purchases in SCIS

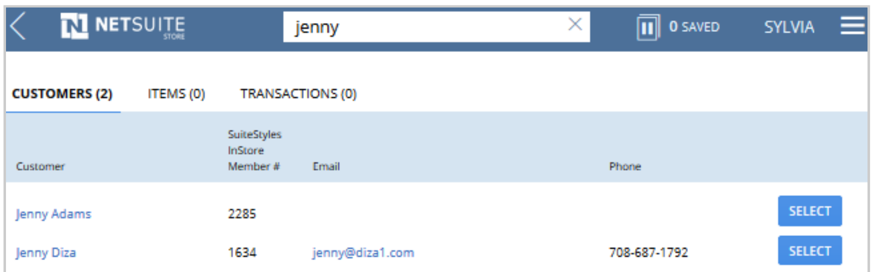
Adding Customers To Sales Transactions in SCIS

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

If the customer does not already exist in the system, and he or she does not want to provide contact information, you can skip this step and start adding items to the order. For more information, see Adding Items to a Sales Transaction in SCIS

Adding an existing customer to a transaction:

1. Type a few letters of the customer's first or last name.
2. Click the **Customers** list.



3. Click **Select** next to the customer name.

For more information about adding a new customer to a transaction, see Creating a Customer Record in SCIS.

After you have added a customer to the transaction, you can start adding items. For more information, see Adding Items to a Sales Transaction in SCIS.

Adding Items to a Sales Transaction in SCIS

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

- Adding Items Using the QuickAdd Bar
- Adding Items Using a Barcode Scanner
- Adding Items from the Search Results Page
- Adding Items to an Order from a Product List

Adding Items Using the QuickAdd Bar

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

To select an item using QuickAdd keys:

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

2. Select the QuickAdd group that includes the item you want to add. The system administrator defines QuickAdd groups to organize items on the QuickAdd bar.

3. Click **Add** . If you need to add more than one item, add the item to the cart, and then modify the quantity in the cart.
4. When you have finished adding items, you can collapse the QuickAdd bar.

Adding Items Using a Barcode Scanner

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

Adding Items from the Search Results Page

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

To add an item from a list of search results:

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

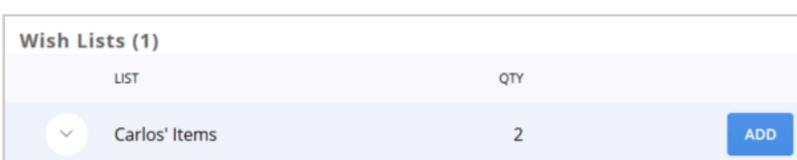
From the search results page, you can click Add to add the item to the current transaction. Also, you can click the item name to access the product detail page.

Adding Items to an Order from a Product List

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

To order an item from a product list:

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



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

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

To save an item for later:

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

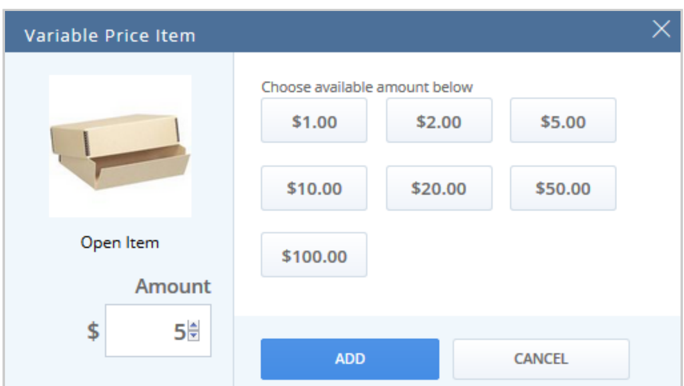
3. Enter a product list name, then click **Create and Add Item**. If a customer has previously created a list, you can select the list.
4. Click the X in the upper right corner to close the popup.

Adding an Open Item

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

To add an open item to an order:

1. Find the open item using **Search** or the **QuickAdd Bar**.
2. Click **Add**. The Variable Price Item screen appears.



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

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

Adding a Serialized or Lot Numbered Item to an SCIS Order

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

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

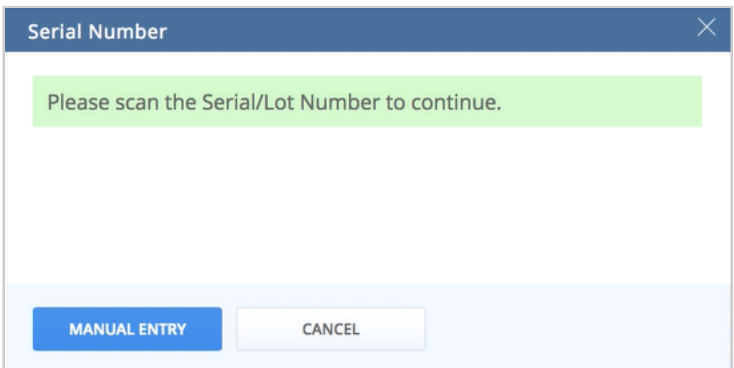
1. Find the item using any one of the following methods:

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

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

- Barcode scan

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



3. Click a payment option to complete the order.

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

- You cannot set the quantity of serialized or lot items in SCIS. A single line item is always added to the cart. You can add multiple items to the cart, but each line item must have a unique serial or lot number.
- Serial and lot numbered Items are not eligible for delivery orders with SCIS. This is because the serial or lot number must be defined on the order prior to delivery.

SCIS Store Pickup and Orders for Delivery

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

> **Note:** You a customer is required (enter name, street address, and email address) for a Store Pickup or Delivery order.

For information about adding notes to items in an order, read Adding Notes to Items and Transactions in SCIS.

To order an item for store pick up or delivery:

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

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

To order an item for delivery:

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

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

    a. Click **Add a New Address**.
    b. Enter values for each of the required fields. Required fields are those fields marked with an asterisk (*).
    c. Select the following options that apply (you can choose more than one):
        - **This is a Residential Address** – marks the address as a residential address for delivery purposes.
        - **Default Billing Address** – designates this address as the default billing address for this customer.
        - **Default Shipping Address** – designates this address as the default shipping address for this customer.
    d. Click **Add**.
5. Select a shipping method.
6. Click **Order**

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

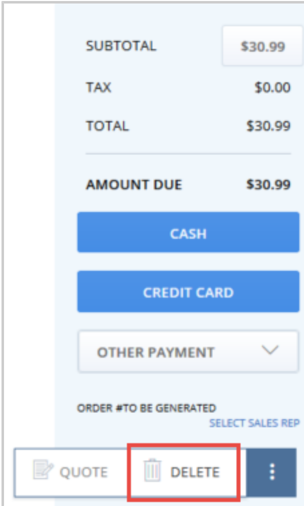
- The delivery icon appears below the item in the Cart. Click this icon to edit the shipping address if necessary.
- The shipping charges are added to the transaction summary. Click the amount in the transaction summary to void shipping and handling charges.

Delete, Save, or Resume a Transaction in SCIS

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

Deleting a Transaction

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



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

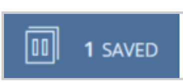
Saving an order

You can save (or suspend) an order at any point after you started building it. Saving an order is useful if the customer is not ready to complete the order at the moment, but you are certain that the customer will complete the order later. To save a sales transaction, click the Save Order icon.

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

Resuming an Order

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



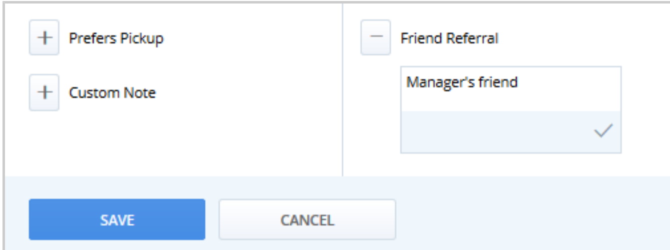
A popup displays showing a list of saved orders. Click the arrow next to the order you want to resume. Click **Resume**.

Adding Notes to Items and Transactions in SCIS

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

To add Notes to a transaction:

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



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

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

Accepting Payments for Purchases in SCIS

SuiteCommerce InStore (SCIS) supports multiple payment methods. After you have added items to the customer's cart, the transaction summary shows a button for paying with cash, a button for paying with a credit card, and a button for paying with other payment methods. The payment methods available in SCIS are based on configuration performed by the system administrator.

For more information, read the following topics:

- Paying with Cash
- Paying with a Credit Card
- Paying with a Check
- Paying with a Gift Card
- Purchase On Account

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

Paying with Cash

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

To accept a cash payment:

1. Add items to a transaction as described in Adding Items to a Sales Transaction in SCIS.
2. Click **Cash**.
3. Enter the amount received. You have three options:
   - **Quick Cash** – Use the QuickCash buttons to increment the amount received from the customer.

- **Manual** – Type the amount of cash received from the customer in the **Amount Tendered** field.
- **Tender Up** – Click this button to automatically enter a value equal to the next highest increment. For example, if the total due is $20.90, the Tender Up button inserts $30.00 in the **Amount Tendered** field.

4. Click **Apply Payment**.
5. Provide the receipt to the customer.

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

Paying with a Credit Card

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

To enter a credit card payment:

1. Add items to a transaction as described in Adding Items to a Sales Transaction in SCIS.
2. Click **Credit Card**.
3. Enter credit card information automatically by swiping the customer's credit card using a card reader.

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

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

Working with a Declined Credit Card

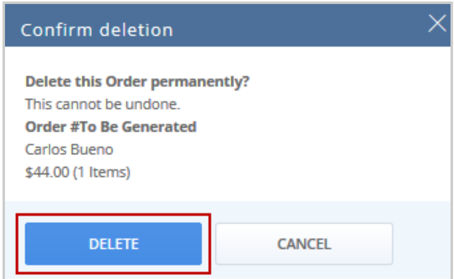
When a credit card is declined and the customer decides not to finish the purchase, the sales associate must delete the order to void the transaction.

To end a transaction when the credit card is declined:

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

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



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

Paying with a Check

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

To accept a check payment:

1. Add items to a transaction as described in Adding Items to a Sales Transaction in SCIS.
2. Click **Check**.
3. Enter the amount on the check. You have three options:
   - **Quick Cash** – Use the QuickCash buttons.
   - **Manual** – Type the amount of cash received from the customer in the **Amount Tendered** field.
   - **Tender Up** – Click this button to automatically enter a value equal to the next highest increment.

     For example, if the total due is $20.90, the Tender Up button will insert $30.00 in the Amount Tendered field.
4. Click **Next**.
5. Enter the **Check Number**.
6. Click **Apply Payment**.
7. Provide the receipt to the customer.

Paying with a Gift Card

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

Accepting payment with a gift card:

1. Add items to a transaction as described in Adding Items to a Sales Transaction in SCIS.
2. In the transaction summary window, select **Other Payment**, then select **Gift Card**.
3. Enter the gift card information:
   - You can swipe the gift card, if you are working with a physical gift card.
   - You can click **Manual Entry** to enter the authorization code of a digital gift certificate. Click **Next** after entering the authorization code.

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

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

5. Provide the receipt to the customer.

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

Purchase On Account

In SuiteCommerce InStore (SCIS), the **Purchase On Account** option enables customers to purchase items using payment terms that an administrator has already set up in NetSuite. After selecting a customer on the order, you can select the Purchase on Account option from the list of Other Payment options. When an order is placed using Purchase on Account, an invoice is created in NetSuite.

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

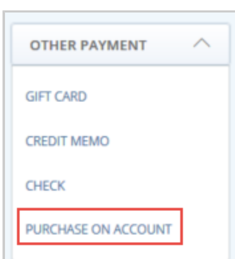
If the customer already has terms defined on the customer record, those terms are preselected in SCIS. If the sales associate is entering a new customer at point of sale, then the sales associate can choose from the list of customer payment terms defined by the Administrator in NetSuite.

To use Purchase On Account:

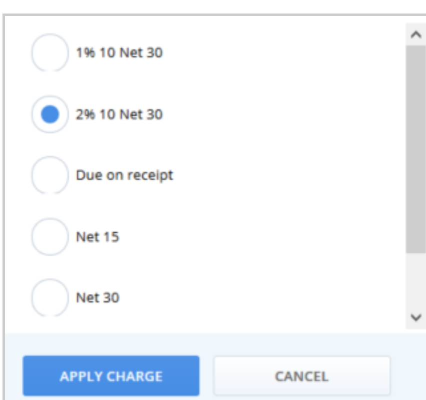
1. Add items to a transaction as described in Adding Items to a Sales Transaction in SCIS.

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

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



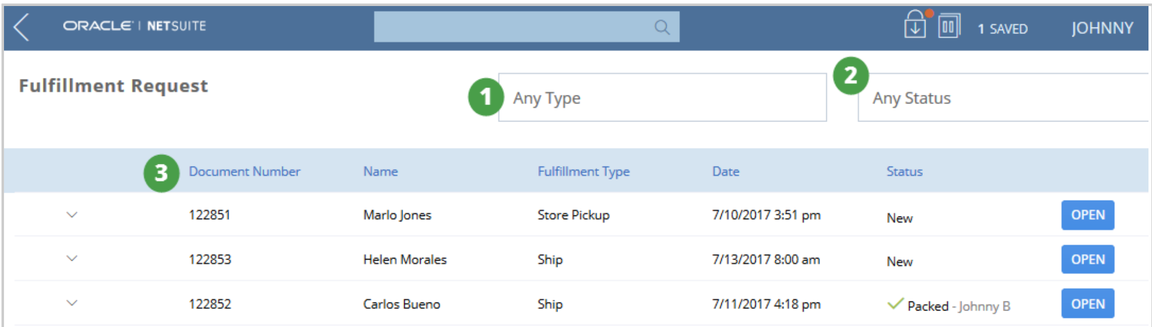
3. Choose payment terms for the customer, or accept the terms that are preselected.



4. Provide the receipt to the customer.

Fulfilling Orders for Shipping and Pickup with SCIS

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



Page Element	Description
1 Fulfillment type filter	Select one of the following to view a certain type of fulfillment request in the list: ■ Any Type ■ Ship ■ Store Pickup
2 Order status filter	Select one of the following to view a certain type of order status: ■ Any Status ■ New ■ In Progress ■ Picked ■ Packed **Note:** By default, packages that have been shipped are not displayed on the Fulfillment Request list.
3 Column headers	You can click on each column header to sort the list as you wish. The following information is displayed: ■ Document Number ■ Customer Name ■ Fulfillment Type – Shows Ship or Pickup. ■ Date – Shows the date and time of the order. ■ Status – Shows the current status of the order. Orders remain open until they are shipped. If the Open button is dim, that means you cannot access the order. Either someone else is working on the order, or it is being fulfilled from a location other than your own.

For more information, read the following topics:

- Fulfilling Orders for Shipping

- Preparing Orders for Pickup In-Store

Note the following limitations for shipping from store and pickup in store:

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

Fulfilling Orders for Shipping

When you fulfill orders for shipping, you must go through each step in the process of order fulfillment: picking, packing and shipping. When you are working on an order, the order is displayed on the list as in progress, along with your name. Only the sales associate who is working on an order can complete the fulfillment process. After you complete each step in the process, you are directed back to the Fulfillment Request page to complete the next step.

To pick an order for shipping:

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

1. Click the shopping bag icon to be directed to the **Fulfillment Request** list.
2. Find an order on the list with Fulfillment type set to **Ship** and status **New**.
3. Click **Open**.
4. On the Ship Request page, choose **Pick**. You must pick the quantity of items specified on the order.

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

5. Click **Pick**. You are directed back to the **Fulfillment Request** page.

To pack an order for shipping:

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

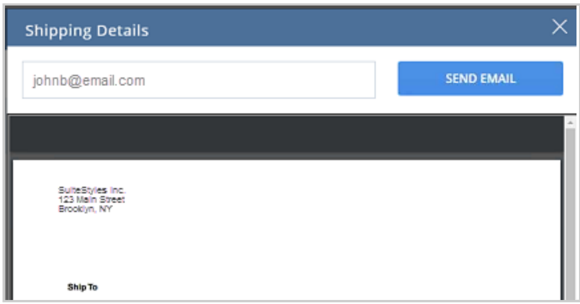
1. Find the order that you have picked. It is displayed in the Fulfillment Request list with the status of **Picked**, along with your name. The order is still Open.
2. Click **Open**. You are directed to the Ship Request page.
3. Click **Print** to print the receipt and include it in the box for shipping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

To label and ship the order:

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

1. Find the order that you have packed. It is displayed on the Fulfillment Request list with the status of **Packed**, along with your name. The order is still Open.

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



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

Preparing Orders for Pickup In-Store

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

To prepare an order for pickup in-store:

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

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

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

Adding an Item to the Order for Pickup

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

Entering Quotes in SCIS

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

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

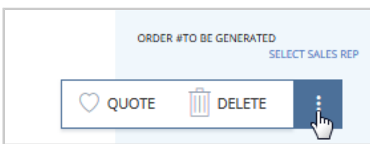
- Creating a Quote
- Finding a Quote
- Converting a Quote into an Order

Creating a Quote

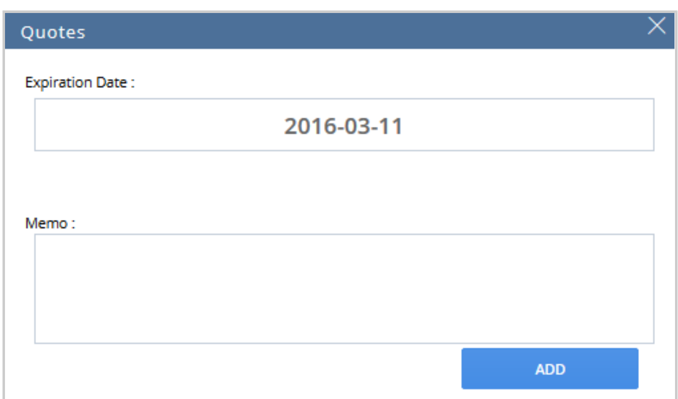
After you create a quote, you can open the quote again to make changes. You can print the quote or send the quote to the customer in an email message.

To create a quote:

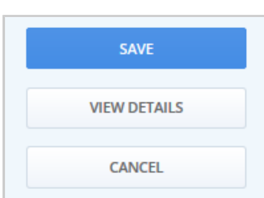
1. Select a customer.
2. Add items to the order.
3. Click **Quote** in the menu below the transaction summary.



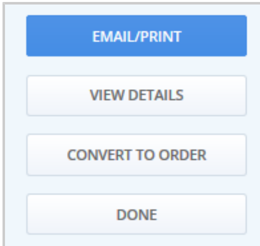
4. Enter information in the **Quotes** window. The fields displayed in the popup window are defined by your account administrator. Note that the fields displayed in your implementation of SCIS may be different from the screenshot below.



5. Click **Add** to add the cart contents to the quote.
6. Click **Save** to save the quote.



After you save the quote, there are some optional actions you can perform.



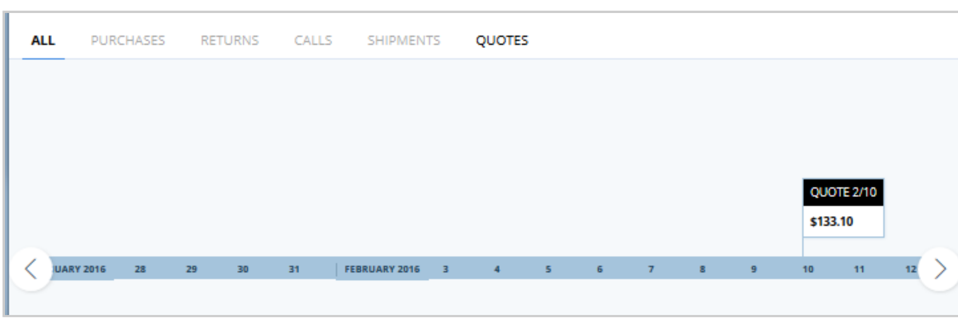
- Click **Email/Print** to email the quote to the customer or print it.
- Click **View Details** to open the Quote window, and view information saved on the quote, such as expiration date and notes.
- Click **Convert To Order** to turn the quote into a sales transaction.
- Click **Done** to save the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

Finding a Quote

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

- Scan the transaction number on a receipt.
- Type the transaction number in the search box.
- Type the customer's name in the search box.

When you type the customer's name in the search box to find a quote, the quote is displayed in the Customer Profile. Click on the quote in the time line to open it, and then convert it to a sale.



Converting a Quote into an Order

After you convert the quote to an order, you can select a payment method, and then complete the order. You can also add the customer's address and make arrangements to ship the order.

To convert a quote into an order:

1. Open the Quote.

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

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

Discounts and Markups in SCIS

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

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

Applying Discounts

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

To apply a discount to an item in the cart:

1. Add items to a transaction as described in Adding Items to a Sales Transaction in SCIS
2. Click the price of the item in the cart. The **Select Discount** window appears.
3. Choose one of the predefined discounts, or click **Custom Discount**.

   If you choose to add a custom discount, enter the discount as a percentage, flat rate discount, or enter a new price for the item. Then choose one of the predefined reasons for the custom discount. If you choose custom reason, enter the reason in the text box.
4. Click **Apply**.

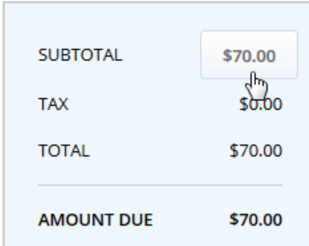
The discount appears in red below the item total. If you apply a custom discount, the reason for giving the discount is also displayed. To apply a discount to the entire order, click the **Subtotal** of the transaction in the Transaction Summary. Follow Steps 3- 4 as described above.

Applying a Markup or Price Override

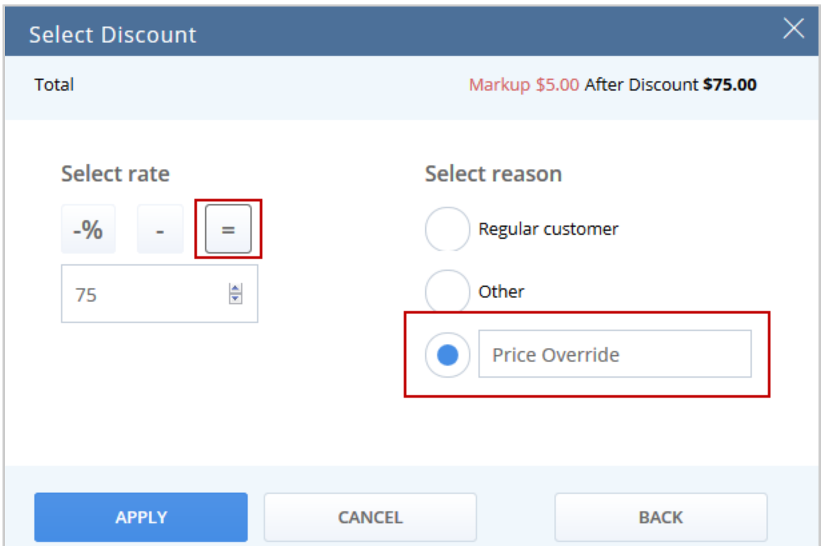
In SCIS, click on the amount in the line-item in the cart or the order subtotal. Then use the custom discount user interface to change the amount.

To apply price override on an order

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



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



4. Click **Apply**.

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

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

Applying Promotion Codes to Transactions in SCIS

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

SCIS supports several types of promotions including SuitePromotions, standard promotions, and Advanced Promotions. An administrator must first configure promotions in NetSuite, and then sales associates can start using them in SCIS. The basic procedure for applying a promotion is the same, no matter which type of promotion you are working with. However, there are certain capabilities available if the administrator has enabled SuitePromotions.

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

- Basic Procedure for Applying a Promotion in SCIS

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

Basic Procedure for Applying a Promotion in SCIS

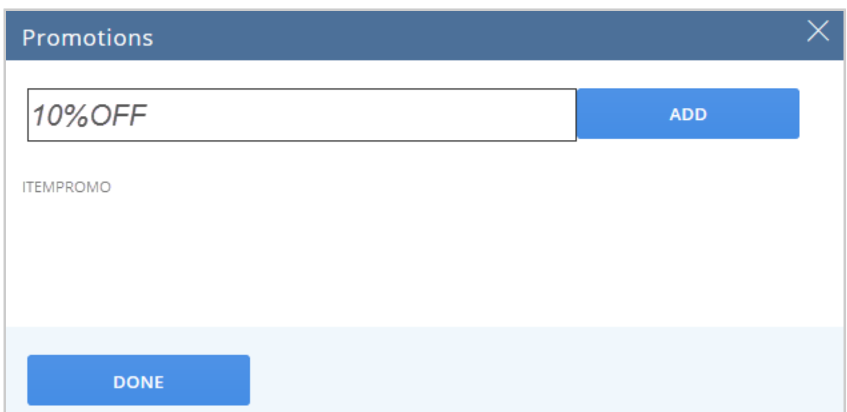
Use the following steps to add any type of promotion to orders in SCIS.

> **Note:** Standard and Advanced promotions are not compatible with the Stackable Promotions, Auto-Apply, and Best Offer features. Only SuitePromotions can take advantage of Stackable Promotions, Auto-Apply, and Best Offer features.

To apply a promotion code in SCIS:

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

3. Enter or scan the coupon code.



4. Click **Submit**.

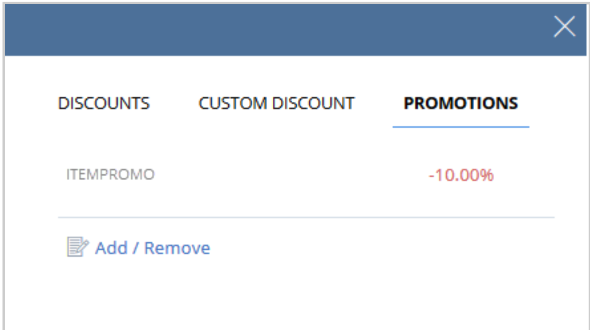
Working with Stackable Promotions in SCIS

With stackable promotions, you can add more than one coupon code to an order. You can add any combination of item promotions and order promotions to a sales transaction. An administrator must define which promotions can be stacked and which promotions are exclusive and cannot be combined with other promotions. If you make a mistake, you can remove coupon codes that were applied in error.

To apply stackable promotions in SCIS:

1. Add items to the cart.
2. Click the price tag icon in the main SCIS screen.
3. Enter or scan a coupon code in the popup.

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



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

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

Working with Auto-Apply Promotions in SCIS

Eligible promotions can be automatically applied to an order, without the need for a sales associate to research which promotions should be applied. If the administrator has configured Auto-Apply promotions in the system, then you will see discounts applied to the order immediately after items are added to the cart. Auto-apply runs in the background. When changes are made to a transaction the system can determine which promotions are applicable to that transaction.

> **Note:** Up to 30 active promotions can be added to a transaction for a specific date range per location. You can add more promotions manually if the transaction is eligible. Auto-Apply promotions cannot be removed from orders in SCIS.

Working with Auto-Apply and Stackable Promotions in SCIS

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

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

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

   > **Note:** You can remove stackable promotions from an order, but you **cannot** remove auto-apply promotions from an order.

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

Working with Gift Cards in SCIS

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

See Paying with a Gift Card for more information on using a gift card as payment on a transaction.

To sell a gift card:

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

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

To sell a digital gift certificate:

1. Use the search bar or the QuickAdd bar to find the digital gift card item in SCIS.
2. Click **Add**, to add it to the order.
3. Enter the gift certificate amount.
4. Click **Next**.
5. Enter the following information:
   - **From** – the person sending the gift certificate.
   - **Recipient Name** – the name of the person receiving the gift certificate.
   - **Recipient Email** – the email address of the recipient.
   - **Auth Code** – the authentication code of the gift certificate. This code may be automatically generated by SuiteCommerce InStore, depending on system configuration. You can use this code to search for the gift certificate after it is sold.
   - **Message** – (Optional) Add a message that appears on the digital gift certificate.
6. Click **Add**.

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

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

Refunds, Returns, and Exchanges in SCIS

To enter a return, log into SuiteCommerce InStore (SCIS), then retrieve the transaction from the customer's profile. If there was no customer associated with the order, then type the transaction number in the search bar. The transaction number is displayed on the receipt from the original order. You can create an exchange by adding a new item to the return transaction.

> **Note:** If you are working with a sales transaction that does not have a customer associated with it, you must create a new customer as you process the return.

For more information, read the following topics:

- Refunds
- Returning an Item

Refunds

SCIS offers the following options for providing a refund while processing a return:

- **Refund credit memo**

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

  If you choose to refund cash or a credit card, then the refund is processed similar to a sales transaction. The sales associate can refund the customer from the cash drawer or by scanning the credit card used for the original purchase.

Refunding a Partially Paid Transaction

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

To refund a partially paid transaction:

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

Returning an Item

The first step when returning an item is to locate the original purchase transaction in SuiteCommerce InStore. Next, identify the item (or items) being returned. Then, choose a payment method for the refund.

To return an item:

1. Find the transaction. You can find a transaction in SCIS in the following ways:
   - Scan the receipt.
   - Use the Search Bar to find the transaction based on the transaction ID. On the Search Results page, click the transaction ID.
   - Find the transaction on the customer profile.

   After locating the transaction, a pop-up window appears displaying each item in the transaction.

2. Click **Return**.
3. Select the items to be returned.
   - If the customer is returning multiple items of the same type, use the + and – buttons to determine how many items to return, then click **Return**.
   - To return all items, click **Return All**.

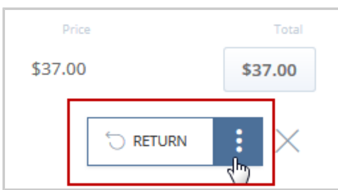
   The items to be returned appear in the cart.
4. (Optional) Select a reason for the return from the drop down list next to the item.
5. Choose a payment method to refund the customer.

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

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

To process a return without a receipt:

1. Add the item to the order.
2. Click the Line Item Action Menu.



3. Select **Return**.
4. Issue a credit memo or pay the refund.

When a return is processed in SCIS without a receipt, an invoice and credit memo are generated in NetSuite.

To perform an exchange transaction:

1. Start by creating a Return transaction. For more information, see Returning an Item.
2. Add the exchange item to the return transaction.

   You can add the same item being returned or one or more different items.
   - If the total of the exchange is more than the total of the return transaction, a balance due is shown in the transaction summary.
   - If the total of the exchange is equal to the total amount of the return transaction, click **End Transaction**.
   - If the total of the exchange is less than the total amount of the return transaction, then a refund is due. The amount is shown in the total screen.
3. Give the receipt to the customer.
4. Click **Done**.

Working with Credit Memos in SCIS

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

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

To apply a credit memo as payment:

1. Add the customer to an order.
2. Add items to the order.
3. Click **Other Payment**, and then click **Credit Memo**. Available credit memos display in a list.
4. Choose the credit memo to apply to the order.
5. Click **Next**.
6. Click **Apply**.
7. The amount of the credit memo shows in the transaction summary as a credit.
8. Click the appropriate payment method for any outstanding amount.
9. Give the receipt to the customer.

Viewing a Sales Report in SCIS

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

A sales report contains the following information:

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

To view a sales report:

1. Log in to SuiteCommerce InStore.
2. Click the User Menu.
3. Select **Sales Report**.

Viewing a Saved Search in the SCIS User Menu

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

To view saved searches:

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

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

Working with Customer Information

When you create or edit a customer in SuiteCommerce InStore (SCIS), that customer record is created or modified in NetSuite. The system administrator configures the fields on customer records that sales associates can view and modify. A customer can be an individual or a company.

The Customer Profile in SCIS, enables you to view customer information together with purchase history. The customer profile includes basic contact information including name, address, and email.

For more information, read the following:

- Creating a Customer Record in SCIS
- Updating a Customer Record in SCIS
- Viewing the Customer Profile
- Adding Customer Notes in SCIS
- Customer Time Line
- Customer Statistics

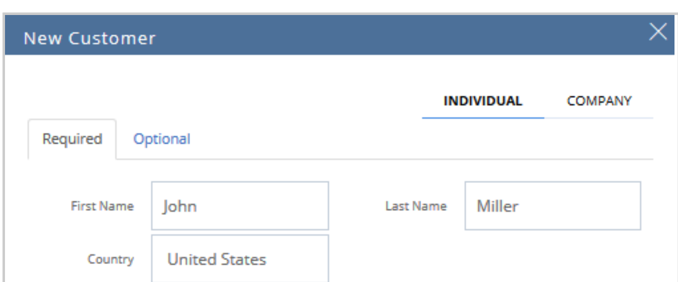
Creating a Customer Record in SCIS

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

To create a customer:

1. Type some letters or numbers in the search bar that may or may not return a customer in search results.

2. Click **Add New Customer**.
3. The new Customer dialog appears.



   a. If the customer is an individual customer, click **Individual**. Click **Company** if the customer is a company.
   b. Click the **Required** tab, then enter the customer information as necessary.

   c. Click the **Optional** tab, then enter information as necessary.

4. Click **Save**.

Updating a Customer Record in SCIS

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

To update customer information:

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

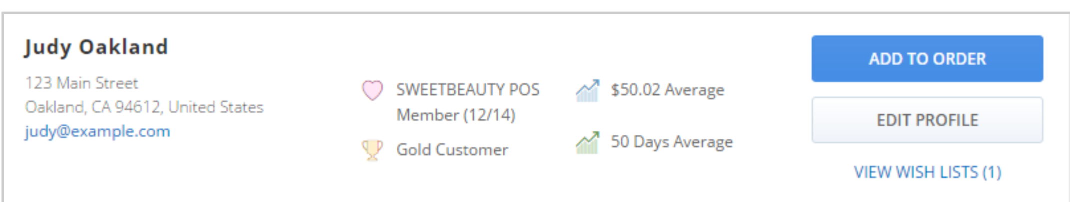
Viewing the Customer Profile

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

To view the Customer Profile:

1. Use the search bar to find a customer.
2. Click the customer name. The customer profile displays.

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



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

- **Name** displays the first and last name of the customer. In a company profile, only the company name is displayed.
- **Address**: displays the customers address.This can be a street name and number, post office box, etc.
- **City, state, postal code, and country**: displays the information defined in the customer's profile.
- **Email**: displays the email address of the customer. This is the address used to communicate with a customer and send transaction receipts.

- **Membership date**: displays the date the customer's profile was created.
- **Average transaction amount**: displays the average amount the customer spends during each transaction.
- **Average time between transactions**: displays the average time between each customer's transaction.
- **Add to Order**: Click to add this customer to the current transaction.
- **Edit Profile**: Click to edit the customer's profile.

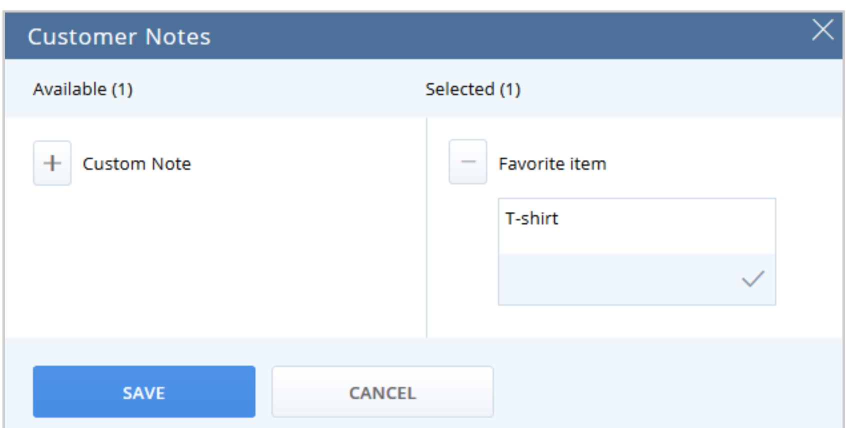
Adding Customer Notes in SCIS

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

To add a note to a customer profile:

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

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



4. Click Save.

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

Customer Time Line

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

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

To view the customer time line:

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

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

The customer activity time line displays the following types of events:

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

You can also filter the customer activity time line by performing the following:

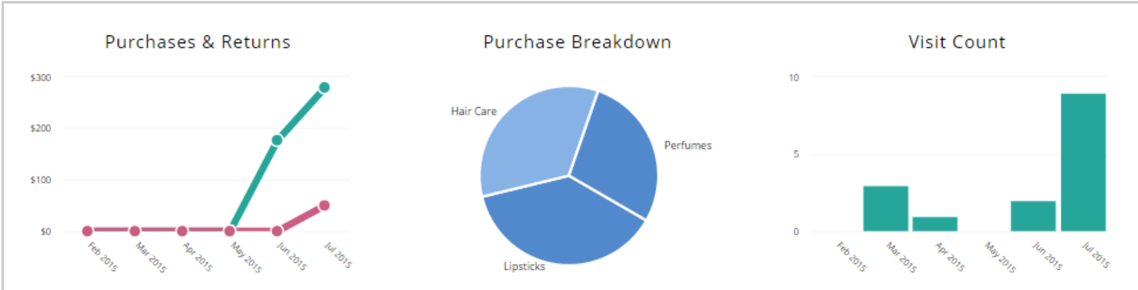
- Select one of the tabs to restrict the types of events displayed on the timeline.
- Zoom in and out of the timeline using the zoom icons.
- Navigate chronologically through the timeline using the left and right arrows.

Customer Statistics

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

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

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



This information is divided into the following graphs and charts:

- Purchase and Returns
- Visit Count
- Purchases Breakdown