

Category	POS	Version	1.0
		Client	Generic
		Software	2.15.8

# POS Operator Functions

## Hints and Tips

- ✓ Add products to a transaction in the **Item Menu** screen by:
  - scanning or key-entering the barcode
  - using pre-set **Quick Items** (mainly for difficult to scan and fresh produce)
  - using **PLU Look up**.
- ✓ **Tafmo Electronic products** (recharge vouchers etc) are sold via Quick Items and print as a voucher. An internet connection is required. Some products display an on-screen keyboard to complete registration.



- ✓ If you **change the price** of an item, you can only **change quantity/repeat** that unit if this is configured in your system.
- ✓ Your business may limit the **maximum price & quantity** you can enter; an error will display.
- ✓ Your business decides if an action prompts for supervisor; they must enter (or scan) their **ID and PIN** to continue.



## Procedure to Log On

1.	On the Logon Menu screen, enter your <b>Operator #</b> .	
2.	Press <b>Enter</b> or <b>Next</b> .	
3.	Enter your <b>PIN #</b> .	
4.	Press <b>Enter</b> or <b>Logon</b> . <i>*If the register drawer opens, put your cash float in it.*</i>	
5.	If prompted, enter a <b>Sales Person ID</b> for the day. <i>*e.g. chose from 01 -99.*</i> <i>*Once logged on, you can use your sales person ID any register.*</i>	

## Procedure to Log Off or Log On another Operator

1.	Press <b>Log Off</b> .							
2.	<table border="1"> <tr> <th>To:</th> <th>then:</th> </tr> <tr> <td>log on another operator to the same register <i>*only if using salesperson IDs*</i></td> <td>press <b>Log On</b>. <i>*Refer to Procedure to Log on.*</i></td> </tr> <tr> <td>log off at the end of your shift <i>*all operators are automatically logged off at midnight.*</i></td> <td>press <b>Log Off</b>. If prompted, enter your Operator ID &amp; password. <b>Press Logoff.</b></td> </tr> </table>	To:	then:	log on another operator to the same register <i>*only if using salesperson IDs*</i>	press <b>Log On</b> . <i>*Refer to Procedure to Log on.*</i>	log off at the end of your shift <i>*all operators are automatically logged off at midnight.*</i>	press <b>Log Off</b> . If prompted, enter your Operator ID & password. <b>Press Logoff.</b>	    
To:	then:							
log on another operator to the same register <i>*only if using salesperson IDs*</i>	press <b>Log On</b> . <i>*Refer to Procedure to Log on.*</i>							
log off at the end of your shift <i>*all operators are automatically logged off at midnight.*</i>	press <b>Log Off</b> . If prompted, enter your Operator ID & password. <b>Press Logoff.</b>							

## Procedure to Repeat Current Item

1.	Press <b>Repeat Current Item</b> . <i>*The last item scanned is selected by default; press <math>\Delta</math> or <math>\nabla</math> to select a different item.*</i> <i>*Each repeat is listed on-screen, but prints consolidated on the receipt.*</i>	
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## Procedure to Change Quantity

1.	Press <b>Change Quantity</b> . <i>*The last item scanned is selected by default; press <math>\Delta</math> or <math>\nabla</math> to select a different item.*</i>	
2.	In the <b>New Quantity</b> field, enter the new quantity.	
3.	Press <b>Enter</b> .	

## Procedure to Remove (Void) an Item

1.	Press $\Delta$ or $\nabla$ to select the item.	
2.	Press <b>Void Current Item</b> . <i>*The item is highlighted red.*</i>	
3.	Select the applicable reason. <i>*Your business decides if the voided item doesn't print on the receipt.*</i>	

## Procedure to Show the Touch-Screen Keyboard

1.	Press  located at the top of the screen.	
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**Hints and Tips**

- ✓ **Customer IDs:**
  - Your registers may prompt for a **Customer ID** at the start or the end of the sale.
  - **Barcoded privilege cards** can usually be scanned at the Item Menu screen.
  - **AR customer codes** can only be entered on the Customer ID Menu screen.
  - The **Advanced Search** options and fields displayed are set in POS Config.
- ✓ When a customer buys on **Account**, 2 copies of the receipt print; your store keeps the copy that the customer signs.
- ✓ POS only applies the full value of a **manual/automatic dollar/percent-off discount** if the final transaction amount due is greater than or equal to \$0.00.
  - Refunds are excluded.
- ✓ Receipt options (in POS Config):
  - Prompt to print a receipt after every transaction
  - Show a **transaction discount** apportioned across each product discounted.
- ✓ **With integrated EFT:**
  - when **EFT cash-out** occurs, any rounding is reflected in the **total paid by EFT**, to stop customer or store advantage.
  - **if EFT goes offline**, you still select **EFTPOS** like normal. The pin pad prints a signature slip, & prompts authorisation if the transaction is a high value.

**Procedure to Add/Change a Customer Account**

1.	Press <b>MISC</b> .	
2.	Press <b>Change Customer ID</b> .	
3.	To add an account: a. Scan/enter the barcode or <b>Code</b> . b. Press <b>Next</b> . <i>*The account is added to the sale.*</i>	
	To search for an account: a. Press <b>Advanced Search</b> . b. Enter the search text. c. Press the type of data entered. <i>*If you press the type of data first, press Next/Enter/▼ after entering the criteria.*</i> d. Select <b>Starts with</b> , or <b>Contains</b> . <i>*The results are displayed.*</i> e. Use ▼/▲ to select the account. <i>*Press Enter to view details.*</i> f. Click <b>Next</b> . <i>*The account is added to the sale.*</i>	
	To remove an account: a. Press <b>Clear Customer ID</b> . b. Press <b>Next</b> . <i>*The account is cleared.*</i>	

**Procedure to Finalise Txn with Cash**

1.	Press <b>Cash Payment</b> .	
2.	Select a pre-set amount, or enter an <b>Amount</b> & press <b>Enter</b> . <i>*Don't use a decimal place.*</i> <i>*You can press Back to cancel.*</i>	

**Procedure to Finalise with Other/Split Tender**

1.	Press <b>Process Payment</b> .	
2.	Select the payment method. <i>*Account only displays if you added a customer account.*</i> <i>*To redeem a loyalty voucher, choose Voucher. To pay with loyalty points, choose Voucher -&gt; Points Tendering. (Add the account before you press Process Payment).*</i>	
3.	Select the full amount, or enter an <b>Amount</b> & press <b>Enter</b> . <i>*EFTPOS with cash-out must be the last split tender processed.*</i> <i>*If your POS displays the Cash Out Menu when you choose EFT, to part-pay EFT (no cash-out) press Total EFT Amount and enter the amount.*</i>	
4.	The screen prompts for another tender if there's an amount due.	

**Procedure to Finalise with Cash Out**

1.	Press <b>Process Payment -&gt; EFT</b> .							
2.	<table border="0"> <tr> <td><b>If the:</b></td> <td><b>then:</b></td> </tr> <tr> <td>EFTPOS Amount Menu displays first</td> <td>enter the new total (include cash-out); press <b>Enter</b>. <b>OR</b> press <b>Enter Cash Out Amount</b>, &amp; select/enter the cash-out amount.</td> </tr> <tr> <td>Cash-out Menu displays first</td> <td>enter or select the cash out amount. <i>*The new total EFT shows in brackets.*</i></td> </tr> </table> <p><i>*Check that the top of the screen displays the correct new EFT total.*</i></p>	<b>If the:</b>	<b>then:</b>	EFTPOS Amount Menu displays first	enter the new total (include cash-out); press <b>Enter</b> . <b>OR</b> press <b>Enter Cash Out Amount</b> , & select/enter the cash-out amount.	Cash-out Menu displays first	enter or select the cash out amount. <i>*The new total EFT shows in brackets.*</i>	
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Cash-out Menu displays first	enter or select the cash out amount. <i>*The new total EFT shows in brackets.*</i>							

**Hints and Tips**

- ✓ Your business may sell two types of gift cards:
  - **Fixed:** the dollar value is preset on the gift card. Price changes aren't allowed.
  - **Variable:** the dollar value is loaded onto the card at the time of sale. The amounts allowed are set in POS Config.

✓ **You cannot refund an activated gift card;** you can only refund it as a non-scan quick item (to keep reporting correct), and call GiveX to reverse the card on their system.

✓ You can **void** an activated gift card at item level or transaction level; the card is available for sale again.

✓ Gift card sale receipt:



✓ Gift card redemption receipt:



**Procedure to Sell a GiveX Gift Card**

1.	Scan the gift card EAN barcode.	
2.	<b>If selling:</b>	
	<b>then:</b>	
	a fixed gift card	press <b>Enter</b> .
	a variable gift card	enter the dollar value to load & press <b>Enter Price</b> , OR select a preset amount. Press <b>Enter</b> .
3.	Scan the gift card identification barcode on the gift card.	
4.	Press <b>Next</b> . <i>*Loading gift card... is displayed; an error is displayed if the card isn't approved – follow the prompts to continue.*</i>	
5.	Continue and finalise the transaction as normal <i>*A separate gift card details receipt prints after the receipt.*</i>	☐

**Procedure to Perform a Balance Enquiry**

1.	Press <b>MISC</b> .	
2.	Press <b>Gift Card Balance</b> .	
3.	Scan the gift card identification barcode on the gift card.	
4.	Press <b>Next</b> . <i>*A balance receipt is printed.*</i>	☐



**Procedure to Redeem a GiveX Gift Card**

1.	Add items to the transaction.	
2.	Press <b>Process Payment</b> .	
3.	Select <b>Gift Card</b> payment method. <i>*You may need to press <b>More</b> to see this payment method.*</i>	
4.	Select the full amount, or type a split tender <b>Amount</b> and press <b>Enter</b> . <i>*If <b>Up to Balance</b> is listed, it's useful to select if the customer isn't sure how much value is left on the card.*</i>	
5.	Scan the gift card identification barcode on the gift card.	
6.	Press <b>Next</b> . <i>*Redeeming... is displayed; an error is displayed if there are insufficient funds on the card – follow the prompts to continue.*</i>	
7.	If a split tender, finalise the amount due as normal. <i>*You'll return to the Payment menu until it's completely finalised.*</i> <i>*A separate gift card details receipt prints after the receipt.*</i>	☐



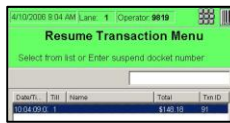

**Hints and Tips**

- ✓ **Suspend** a transaction if there's a price check required; this avoids delaying other customers in the queue.
- ✓ A **suspended transaction** can be recalled at any register. They're usually set to be automatically deleted at midnight.
- ✓ **Refunds:**
  - A transaction can contain both items being purchased and items being refunded. The **Amount Due** is reduced by the refund amount; if it's a negative value, the store gives the customer the amount due.
  - Supervisor may be prompted, but you can configure certain depts to ignore this security.
  - If a refunded product is on an active automatic discount, POS populates the normal price of the product, not the current discounted price.
  - Overtyping the populated refund price if the original receipt is presented and shows a different price (e.g. due to a promotion, or loyalty/seniors discount) (*Price is only prompted if a refund number was entered, and Enter Refund Price is enabled in POS Config.*)
  - You can refund to multiple tenders in any order, & multiple instances of the same tender type (*if enabled in POS Config.*)





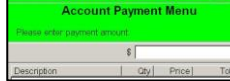

**Procedure to Suspend a Transaction**

1.	Press <b>MISC</b> .	
2.	Press <b>Suspend Transaction</b> . <i>*A suspend receipt is printed.*</i>	





**Procedure to Recall a Suspended Transaction**

1.	Press <b>MISC</b> .	
2.	Press <b>Recall Transaction</b> .	
3.	Either scan the barcode on the suspend receipt, or select the transaction from the list.	
4.	Press <b>Enter</b> .	

**Procedure to Record an Account Payment**

1.	Press <b>MISC</b> .	
2.	Press <b>Pay Account</b> .	
3.	In the <b>Customer #</b> field, scan the customer card. <i>*Or type or search for the number.*</i>	
4.	If prompted, select the required account; press <b>Next</b> .	
5.	In the <b>\$</b> field, enter the amount to be paid.	
6.	Press <b>Process Acct Payment</b> . <i>*Finalise payment as per normal.*</i>	

**Procedure to Refund an Item**

1.	Add the item to the transaction.							
2.	Press <b>Refund Item</b> .							
3.	Select the applicable reason.							
4.	If <b>Enter Refund Docket Number</b> is displayed, scan the barcode on the original receipt ( <i>leave blank or type [0] if not provided</i> ); press <b>Enter</b> . <i>*This is only captured for step 5.*</i>							
5.	If <b>Enter Refund Price \$</b> is displayed, enter a new refund price if different to the current price; press <b>Enter</b> . <i>*This prompt isn't shown if you left the Refund Docket Number blank.*</i>							
6.	<table border="1" style="width: 100%;"> <tr> <td><b>To refund:</b></td> <td><b>then:</b></td> </tr> <tr> <td>to cash, EFT, cheque</td> <td>finalise the transaction as normal.</td> </tr> <tr> <td>onto a variable gift card</td> <td>press <b>Process Payment</b>. Press <b>Gift Card</b>. Load the card as per a normal sale.</td> </tr> </table>	<b>To refund:</b>	<b>then:</b>	to cash, EFT, cheque	finalise the transaction as normal.	onto a variable gift card	press <b>Process Payment</b> . Press <b>Gift Card</b> . Load the card as per a normal sale.	
<b>To refund:</b>	<b>then:</b>							
to cash, EFT, cheque	finalise the transaction as normal.							
onto a variable gift card	press <b>Process Payment</b> . Press <b>Gift Card</b> . Load the card as per a normal sale.							
7.	If a store copy of the return transaction receipt prints, ask the customer to record the requested details. <i>*Follow your stores process to file the store copy receipt.*</i>							

**Hints and Tips**

- ✓ The **Reprint** function is only to reprint the previous transaction. Your supervisor can run the Transaction Journal report to reprint older receipts.
- ✓ **PLU Lookup** is useful to:
  - check a price for a customer
  - check stock on hand and on order (in units)
  - find a stock code for a product (if enabled in POS Config. to display)
  - search for a product and add it to the sales transaction.
- ✓ You can only **Comment** items if this is configured in your system. The comment prints underneath the selected item on the customer receipt.
- ✓ You can only sell products not on file in SUREfire if the **non-scan** function is enabled (in POS Config.).
  - This can be set so that the register **remembers the EAN and price for the day**, and/or prompts for a **description of the product** that prints on the receipt and report.
  - A supervisor can run the **EAN Not Found** report to identify the products that need to be registered.

**Procedure to Add a Delivery/Processing Fee**

1.	Press <b>Quick Items</b> .	
2.	Press the applicable fee button. <i>*The charge is added to the transaction.*</i>	

**Procedure to Reprint the Last Receipt**

1.	Press <b>Reprint</b> .	
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**Procedure to Add a Comment against an Item**

1.	Press <b>MISC</b> .	
2.	Press <b>Update Comment</b> .	
3.	Select the item to comment.	
4.	Type the <b>Comment</b> .	
5.	Press <b>OK</b> .	


**Procedure to Sell an Item Not on File**

1.	Scan the product. <i>*Unknown PLU is displayed.*</i>	
2.	Enter the price of the item.	
3.	Press <b>Enter Price</b> .	
4.	If prompted, enter a description (use the on-screen keyboard).	
5.	If prompted, select the department the product belongs to.	
6.	Follow your stores process to record the non-scan.	







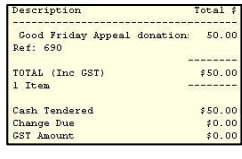
**Procedure to Look-Up a Product**

1.	Press <b>PLU Lookup</b> .	
2.	<p><b>Either:</b></p> <p>scan or type the barcode; press <b>Enter</b> if you type the barcode.</p> <p>click <b>Search by Department</b>. Select the required department. Press <b>Enter</b>. Select the first letter of the product. Press <b>Search at Start</b> or <b>Enter</b>. Select the required product, and press <b>Enter</b>.</p> <p>click <b>Search by Description</b>. Either select the first letter of the product, or click  to type at least two letters of the product. Press <b>Search at Start</b> (of description), OR press <b>Search Full Description</b> (only if typed the description; it searches anywhere in the description text). Select the required product, and Press <b>Enter</b>.</p>	      
3.	Press any key to return to the search results screen.	
4.	To add the highlighted item to a sale, press <b>Add Item to Item List</b> . <i>*The Item Menu is displayed.*</i>	


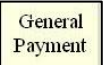

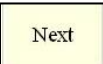
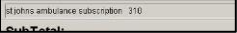

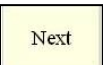

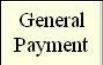
Hints and Tips

- ✓ **General payments** are payments accepted on behalf of a 3<sup>rd</sup> party, such as customer subscriptions/fees.
- ✓ Check how your business manages general payments:
  - As an item within a sales transaction.
  - As a separate account payment against a 3<sup>rd</sup> party; you can't process a payment during a sale.
- ✓ **Reference number:**
  - Scan or type the barcode reference on the bill, or use a store-defined number.
  - Click the on-screen keyboard if a **ref. number** has alpha characters.
- ✓ **Sales- general payments** are listed on the BOS **Transaction Journal** and the **Department Details** report; filter by the general payment department or the stock code.
- ✓ **Account general payments** are reported on the BOS AR record, and the **Reports -> Accountability -> General Payment Report**.
  - The AR record doesn't list the reference number entered.

Procedure to Process a Sale General Payment

5.	On the Item Menu screen, enter the EAN for the required general payment. <i>*Your business may use a barcode scanning sheet, or Quick Item.*</i>	
6.	If the <b>Price</b> field is displayed, enter the amount to be paid, then press <b>Enter Price</b> . <i>*Don't use a decimal place.*</i> <i>*An error is displayed if you enter a value outside a configured acceptable dollar range.*</i>	 
7.	In the <b>Reference number</b> field, enter the code for the payment. <i>*An error is displayed if you enter a code with the wrong prefix or format.*</i>	
8.	Press <b>Next</b> . <i>*The general payment is displayed as an item in the transaction.*</i>	
9.	Add any other items to the transaction.	
10.	Finalise payment method as per a normal transaction. <i>*The receipt lists the payment as Gen Pmt Item, with the amount and the reference number.*</i>	

Procedure to Process an Account General Payment

1.	Press <b>MISC</b> .	
2.	Press <b>General Payment</b> . <i>*You may have to press Pay Account first.*</i>	
3.	In the <b>Customer #</b> field, enter the 3 <sup>rd</sup> party account code. <i>*Your business may provide a list of accounts at the register, or search for the number.*</i>	
4.	Press <b>Next</b> . <i>*The selected account is displayed at the bottom of the screen.*</i>	 
5.	If prompted, in the <b>Reference number</b> field enter the code for the payment. <i>*The reference number may be optional in your store; maximum 30 characters/digits.*</i>	
6.	Press <b>Next</b> .	
7.	In the \$ field, enter the amount to be paid.	
8.	Press <b>General Payment</b> .	
9.	Finalise payment as per normal. <i>*Duplicate receipts are printed if configured in POS config or the AR account.*</i>	