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SUREfire SYSTEMS

POS-1a	Page| 1 of 9	**Version**	1.6
		Client	Generic
Category	POS	**Software**	2.18.5.6

POS Operator Functions

Hints and Tips

✓ Add products to a transaction in the **Item Menu** screen by:
- scanning or key-entering the barcode
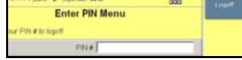- using pre-set **Quick Items** (mainly for difficult to scan and fresh produce)
- using **PLU Look up**.

✓ Your store may allow you to sell whole boxes of a product; scan the TUN barcode (14 digits long) on the outside of the box, or check if there's a quick item for 'instore' boxed products (i.e. a box with 12 cartons of eggs).

✓ 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.

✓ Press **Secure POS** to lock the POS screen if you have to step away; you're still signed in, so just have to enter your PIN to access the screen again.

Procedure to Log On

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

Procedure to Log Off or Log On another Operator

1.	Press **Log Off**.		
2.	**To:**	**then:**	
	log on another operator to the same register *only if using salesperson IDs*	press **Log On**. *Refer to Procedure to Log on.*	
	log off at the end of your shift *all operators are automatically logged off at midnight.*	press **Log Off**. If prompted, enter your Operator ID & password. **Press Logoff**.	
			❏

Procedure to Repeat Current Item

1.	Press **Repeat Current Item**. *The last item scanned is selected by default; press △or▽ to select a different item.* *Each repeat is listed on-screen, but prints consolidated on the receipt.*	❏

Procedure to Change Quantity

1.	Press **Change Quantity**. *The last item scanned is selected by default; press △or▽ to select a different item.*	
2.	In the **New Quantity** field, enter the new quantity.	
3.	Press **Enter**.	❏

Procedure to Remove (Void) an Item

1.	Press △or▽ to select the item.	
2.	Press **Void Current Item**. *The item is highlighted red.*	
3.	Select the applicable reason. *Your business decides if the voided item doesn't print on the receipt.*	❏

Procedure to Show the Touch-Screen Keyboard

1.	Press ▦ located at the top of the screen.	

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Hints and Tips

- ✓ Most **Multi-Buys/Discount Offers** only show after Cash / Process Payment is pressed.
  - From 2.18.5, 'same item' multi-buys (without criteria) can apply/show on the Operator and Customer screens (if set in POS Config.)
  - POS only applies the full value of a **manual/auto discount** if the final amount due is greater than or equal to $0.00.

- ✓ **Afterpay Card** is a digital Mastercard in a customer's Apple Pay/Google Pay (added to their digital wallet via the App).
  - Tender the same as EFTPOS (tap). Available funds must cover 25% of the purchase.
  - A customer may be prompted to enter a pin after tapping, if Face ID hasn't been activated on their phone. At present, any number can be entered and accepted (this is a bank issue).
  - It uses EFTPOS system rules (so there is no way to exclude any products / departments).
  - The receipt displays the truncated number and 'Credit'. Match this number to the wallet if a refund is actioned.

- ✓ **If integrated EFT goes offline,** you select **EFTPOS** like normal. The pin pad prints a signature slip, & prompts authorisation if the transaction is a high value.
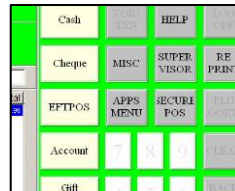
Procedure to Add/Change a Customer Account

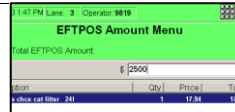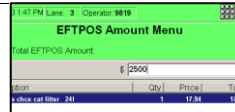| 1. | Press **MISC | Change Cust. ID.** *Customer ID may automatically prompt at the start or end of a sale. Barcoded customer privilege cards can be scanned on the Item Menu.* | |
|---|---|---|
| 2. | To add an account: a. Scan/enter the barcode or **Code.** b. Press **Next.** *The account is added to the sale.* | |
| 3. | To search for an account: a. Press **Advanced Search.** b. Enter the search text. c. Press the type of data entered. *If you press the type of data first, press **Next/Enter/▼** after entering the criteria.* d. Select **Starts with,** or **Contains.** *The results are displayed.* e. Use ▼/▲ to select the account. *Press **Enter** to view details.* f. Click **Next.** *The account is added to the sale.* *Advanced Search options are set up in POS Config.* | |
| 4. | To remove an account: a. Press **Clear Customer ID, Next.** *The account is cleared.* | ❏ |
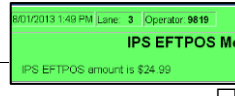
Procedure to Finalise Txn with Cash

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

Procedure to Finalise with Other/Split Tender

1.	Press **Process Payment**.	
2.	Select the payment method. *Account only displays if you added a customer account; 2 receipts print, keep the copy the customer signs.* *To redeem a loyalty voucher, choose **Voucher.** To pay with points, add the account, then at **Payment** choose **Voucher** -> **Points Tendering.**	
3.	Select an amount, or enter an **Amount** & press **Enter.**	
4.	The screen prompts for another tender if there's an amount due.	❏

Procedure to Finalise with Cash Out

1.	Press **Process Payment** -> **EFT.** *'EFTPOS with cash-out' must be the last split tender processed.*		
2.	**If the:**	**then:**	
	EFTPOS Amount Menu displays first	enter the new total (include cash-out); press **Enter.** OR press **Enter Cash Out Amount,** & enter the cash amount.	
	Cash-out Menu displays first	enter or select the cash out amount. *The new total EFT shows in brackets*. *To skip cash-out, press **Total EFT Amount** & enter the amount.*	
	The screen shows the new EFT total.		❏

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Hints and Tips

- ✓ Optional and/or SMS receipt options must be enabled in POS Config. They will change what screen receipt options you see (in selling and training mode).
  - Receipts are not sent to Slyp in training mode.

- ✓ If optional receipts are enabled, a receipt still prints without prompting if:
  - the total due is greater than a configured value
  - fuel/discount coupons are set up to always print
  - the transaction includes:
    - a bank card tender
    - a finance tender
    - a loyalty voucher
    - an EPay or Mobile Recharge Voucher
    - a layby
    - a refund
  - it is a reprinted receipt.

- ✓ All store-copy paper receipts always print.

- ✓ **Reprint** only reprints the previous transaction. Your supervisor can run a Transaction Journal report for older receipts.

- ✓ **Slyp Smart Receipts**
  - A Slyp receipt stores the receipt in the customer's banking app.
  - A paper receipt still prints, unless your store has set up optional receipts too.
  - There is no validation that the mobile number matches the customer or is correct.

Procedure to Print an Optional Receipt

1.	If the customer:	then:
	Wants their receipt	press **Yes**. *The receipt prints.*
	Doesn't want their receipt	Press **No**. *POS returns to the Customer ID/Item Menu.*

If you don't make a choice, after a set time the POS will automatically print the receipt or start a new sale, depending on your store setup.

Procedure to Reprint the Last Receipt

1.	Press **Reprint**.	

Procedure to Print a Slyp Receipt

1.	If the customer:	then:
	Wants a smart receipt	Enter their mb. Press **Yes**. *Slyp sends an SMS link to the receipt, and a receipt prints.*
	Wants a paper receipt	Press **No**. *A paper receipt prints*

If optional receipt AND Slyp are enabled, you can choose to print:

- paper receipt (**Yes**)
- Smart receipt (**SMS | SMS Only**)
- paper and smart receipt (**SMS | Receipt and SMS**).
- No receipt (**No**)

All the rules enabled for optional receipts will apply (such as auto-print of paper receipt, and timeout limit. See Hints and Tips.)

Alternative screens if optional receipt and Slyp are enabled:

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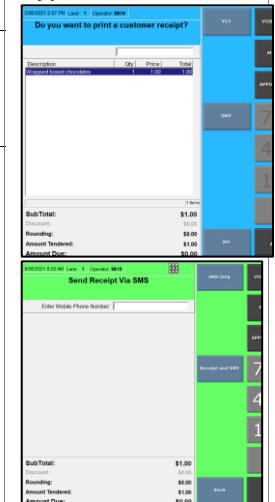
Hints and Tips

✓ A customer must have an account with the lender.

✓ The tender won't display if:
- there are products in the purchase that cannot be purchased using this tender (managed in POS Config).
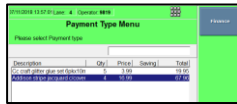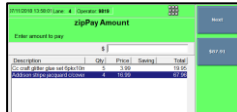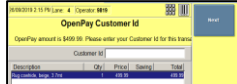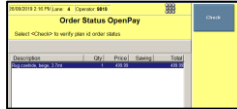- if EFTPOS split tender is disallowed for this finance type, and an EFTPOS tender has already been performed.
- You are in Training Mode.

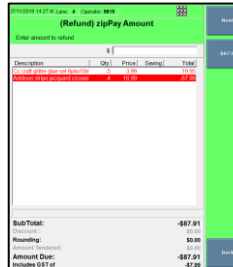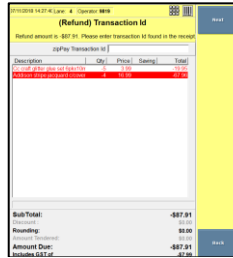✓ A unique purchase ID prints on the customer and refund receipts (Purchase/Order ID)

```
                    -----------
TOTAL (Inc GST)        $40.00
1 Item              -----------

Paid by zipPay (187462)  $20.00
Cash Tendered            $20.00
Change Due                $0.00
```

✓ If POS loses Internet connection during a finance transaction, POS voids a Zip sale in the backend. The customer will see this as a 'cancelled' sale within the lenders app.
- POS doesn't poll for OpenPay, so lending is approved separately to POS. If internet is lost after lending has been approved in the app but before the Check is returned on POS, follow store process to resolve it with the lender.

✓ **Refunds**
- POS errors if a customer tries to refund the same finance ID more than once.
- The lender may impose a time limit on refunds i.e. 120 days.

Procedure to Finalise to Zip or Openpay

1.	Press **Process Payment**.	
2.	Press **Finance**. *Press **More** if you don't see Finance in the tender list.*	
3.	Press the required sub-tender type **Zip** or **OpenPay**.	
4.	Select an amount to tender, or enter an **Amount** & press **Enter**. *Partial tender is allowed, in any order, provided it meets the lenders minimum purchase amount.*	
5.	Ask the customer for the approval code (or Customer ID) to enter on the POS screen. *The lender sends a code to the app on the customers mobile device.*	

6.	If the:	Then ask customer:
	purchase is via Zip	to tap **Confirm** in the app to complete the sale.
	purchase is via OpenPay	to tap **Proceed** in the app (choose an instalment plan) and Buy Now. You can then click **Check** on POS to complete the sale.
	*You can only **Cancel** at POS (to return to Payment Options) if the finance hasn't yet been approved by the lender in the app.*	
4.	The screen prompts for another tender if there's an amount due.	❑

Procedure to Refund to Zip or Openpay

1.	Commence a new refund as normal (scan items, press **Refund**, enter the refund price). *Your system may restrict the option to add purchase and refund items in the same transaction.*	
2.	Press **Process Payment**.	
3.	Press **Finance**.	
4.	Press the required finance sub-tender.	
	Enter the **Amount**. *There is no restriction for the amount being refunded; a partial refund is permitted.*	
	Press **Next**.	
	Enter the original Finance Txn ID. *Obtain this off the customer original purchase receipt, or the customer can view it within the app's Recent Transactions).*	
	Press **Next**. *The transaction is verified with the lender, before the refund receipt prints.*	
		❑

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SURE*fire*

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 Details

             Superstore
             Store one
Transaction Type: Gift Card Activation
Sequence No: 00010100001170010
Authorisation No: 107944
Gift Card Serial No: 603628_____16137446_

      Gift Card Balance: $10.00
          Expiry: None

         Host Response: 0
            APPROVED
```

✓ Gift card redemption receipt:

```
          Gift Card Details

             Superstore
             Store one
Transaction Type: Gift Card Redemption
Sequence No: 00010100001140011
Authorisation No: 107939
Gift Card Serial No: 603628_____16137447_

      Amount Redeemed:  $10.00
      Gift Card Balance: $29.00
          Expiry: None

         Host Response: 0
            APPROVED

Served by Surefire Support on lane 1
```

Procedure to Sell a GiveX Gift Card

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

Procedure to Perform a Balance Enquiry

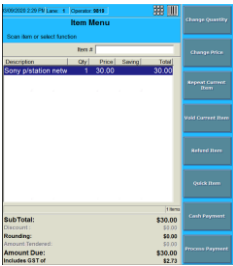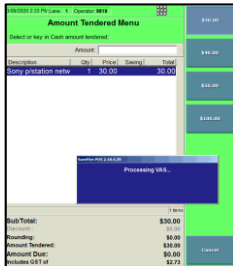| 1.	Press **MISC**.	
2.	Press **Gift Card Balance**.	
3.	Scan the gift card identification barcode on the gift card.	
4.	Press **Next**. *A balance receipt is printed.*	❑

Procedure to Redeem a GiveX Gift Card

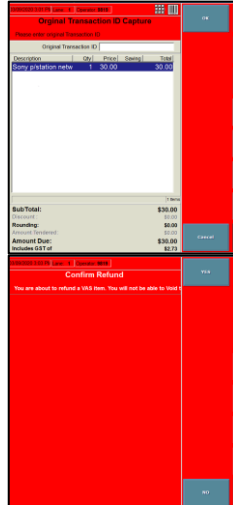| 1.	Add items to the transaction.	
2.	Press **Process Payment**.	
3.	Select **Gift Card** payment method. *You may need to press **More** to see this payment method.*	
4.	Select the full amount, or type a split tender **Amount** and press **Enter**. *If **Up to Balance** is listed, it's useful to select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

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Hints and Tips

✓ **Electronic products** can be a giftcard, or recharge vouchers sold via Quick Items (prints a voucher receipt). An internet connection is required. Your POS must be set up to sell electronic products.

✓ You can **void** an electronic product at the item or transaction level (same way as any product), or if payment fails (**before** payment is completed).
  • Your system may prompt for **supervisor ID** for voids.
  • The receipt only prints the voided line item details (if enabled to print in POS Config).

✓ You cannot **Suspend** if the transaction includes an electronic product. Either void the item/transaction, or complete the transaction.

✓ To troubleshoot **card loading errors**, refer to page 3 TECH-3f Configure EPay Electronic Products Fact Sheet

✓ If your business uses Epay, **refunds** require the EPay TXN ID off the purchase receipt.
  • EPay does not support refunds of certain products, including all Blackhawk gift cards, iTunes, EA Origin, Stan, Xbox CTC, Sportbet, Visa Swipe, JB Hi-Ji Gift Card, Lebara Starter Kit - SIM POSA, Optus SIM POSA, and Vodafone SIM POSA.

Procedure to Sell an Electronic Product

1.	To sell:	then:	
	An E-top up card	Scan the long barcode on the card.	
	A recharge voucher	Select **Quick Items**. Select the menu and product you require.	
	A physical gift card	Scan the long barcode on the card.	
	The product is added to the sale. *Electronic products can't be sold in training mode.* *Variable value cards can't be sold.*		
2.	Continue the sale to add more e-products or other items.		
3.	**Process Payment**/finalise the transaction as normal. *Once payment has been taken, POS communicates with the provider over the internet, to verify and activate the product.* *A separate activation receipt prints after the customer receipt.* *A merchant copy of the activation prints for Epay products, if this option is enabled for your store.* * Use **Reprint** receipt if a store copy of an Incomm sale is needed.*		
4.	Check the customer's receipt. *If activation fails (times-out or they reject the item), an error shows on-screen and on the receipt. You'll need to do a generic department level refund for this product, as payment was taken.*		❑

Procedure to Refund an Electronic Product

1.	To refund:	then:	
	A physical gift card	Scan the long barcode on the card.	
	A recharge voucher	Select **Quick Items**. Select the menu and product you require.	
	The item is added to the basket.		
2.	Select **Refund**.		
3.	If prompted, enter **Supervisor Authorisation** and/or select the **Reason**.		
4.	If prompted, enter the Original Transaction ID (the **epay TXN ID**) off the original receipt. *Use the onscreen keyboard, or a physical keyboard to enter the ID.*		
5.	POS communicates with the provider over the internet, to validate the refund. Select **YES** to continue with the refund, or **NO** to return to item. *POS sends an item cancel to the provider over the internet:* *Success:* the product shows in the basket in red, as refunded. You cannot VOID the refunded item. *Fail:* An error displays and prints on the receipt i.e. not allowed for this card type or already refunded.*		
6.	Add items or refund more items.		
7.	**Process Payment**/ finalise the transaction.		❑

SUREfire SYSTEMS

Hints and Tips

✓ 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.
- Overtype 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.).*

✓ **Refunds to AfterPay**
Confirm the truncated credit card number on the receipt matches the wallet card
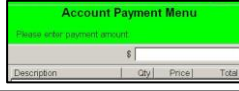
Procedure to Suspend a Transaction

1.	Press **MISC.**	
2.	Press **Suspend Transaction.** *A suspend receipt is printed.*	Suspend Transaction ❑

Procedure to Recall a Suspended Transaction

1.	Press **MISC.**	
2.	Press **Recall Transaction.** *If you can **Resume Multipe Txn**, and choose a supend linked to an AR account, it will pull them*	Recall Transaction
3.	Either scan the barcode on the suspend receipt, or select the transaction from the list.	Resume Transaction Menu
4.	Press **Enter.**	❑

Procedure to Record an Account Payment

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

Procedure to Refund an Item

1.	Add the item to the transaction.	
2.	Press **Refund Item.**	Refund Item
3.	Select the applicable reason.	
4.	If **Enter Refund Docket Number** is displayed, scan the barcode on the original receipt *(leave blank or type [0] if not provided)*; press **Enter.** *This is only captured for step 5.*	Enter Refund Docket Number Menu
5.	If **Enter Refund Price $** is displayed, enter a new refund price if different to the current price; press **Enter.** *This prompt isn't shown if you left the Refund Docket Number blank.*	Enter Refund Price Menu
6.	To refund: / then:	

To refund:	then:
to cash, EFT, cheque	finalise the transaction as normal.
onto a variable gift card	press **Process Payment**. Press **Gift Card**. 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. *Follow your stores process to file the store copy receipt.*	❑

SUREfire

Hints and Tips

✓ **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 SURE*fire* 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.
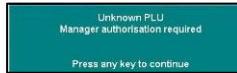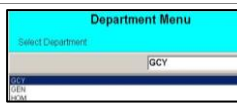
Procedure to Add a Delivery/Processing Fee

|		
1.	Press **Quick Items.**	Quick Item
2.	Press the applicable fee button. *The charge is added to the transaction.*	DELIVERY FEE ❑
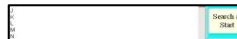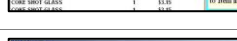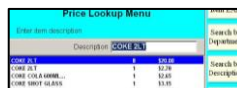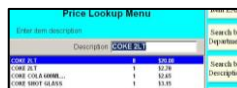
Procedure to Add a Comment against an Item

1.	Press **MISC.**	
2.	Press **Update Comment**.	Update Comment
3.	Select the item to comment.	
4.	Type the **Comment.**	
5.	Press **OK.**	❑

Procedure to Sell an Item Not on File

1.	Scan the product. *Unknown PLU is displayed.*	Unknown PLU Manager authorisation required Press any key to continue
2.	Enter the price of the item.	Enter Price Menu
3.	Press **Enter Price.**	
4.	If prompted, enter a description (use the on-screen keyboard).	Enter Description Menu Description WY MOUNTAIN WATER 1L
5.	If prompted, select the department the product belongs to.	Department Menu GCY
6.	Follow your stores process to record the non-scan.	Item Menu ❑

Procedure to Look-Up a Product
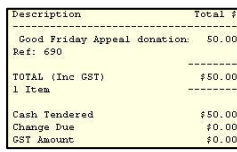
1.	Press **PLU Lookup.**	plu lookup
2.	**Either:**	
	scan or type the barcode; press **Enter** if you type the barcode.	Price Lookup Menu
	click **Search by Department.** Select the required department. Press **Enter.** Select the first letter of the product. Press **Search at Start** or **Enter.** Select the required product, and press **Enter.**	Search by Department
	click **Search by Description.** Either select the first letter of the product, or click ▦ to type at least two letters of the product. Press **Search at Start** (of description), OR press **Search Full Description** *(only if typed the description; it searches anywhere in the description text).* Select the required product, and Press **Enter.**	Search by Description
3.	Press any key to return to the search results screen.	COKE 2LT $2.70 STOCK CODE: 8B4885 STOCK ON HAND: 4 STOCK ON ORDER: 4B Press any key to continue
4.	To add the highlighted item to a sale, press **Add Item to Item List.** *The Item Menu is displayed.*	Price Lookup Menu ❑

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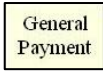
Hints and Tips

✓ **General payments** are payments accepted on behalf of a 3rd 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 3rd 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.
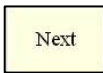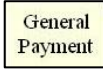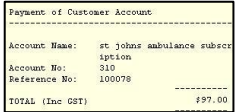- Click the on-screen keyboard if a **ref. number** has alpha characters.

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

Procedure to Process an Account General Payment

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