Mobile Quick Reference Guides

Version 6.25





Orientation to POS

If you are running POS Pro for the first time or you have logged out, you will need to log in.

To do so, in POS Pro:

- 1. Find and then tap your username.
- 2. Enter your password and tap Log In.

Alternatively, you can type in your username and password in the corresponding fields and then tap **Log In**.

3. Tapping Log In will open the app's Home Screen:

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			Monday, De	ecember 12
			2:	14 PM
			STATUS	
			100% Synchronize	ed Sync
Goo	d Morning, Nora!		(⊕) Sending Backup	2%
	0,		DRAWER MEMO	
			Active 15 MAR 2019 / 02:08F	View View
			Return	Customer
			NEW SAL	E
Home	Shipments Catalog	Reports	Count Memos	More

To open a POS area (for example, **Catalog** or **Shipments**), tap the required button in the navigation panel at the bottom of the screen.

Alternatively, tap **More** in the bottom right corner. In the fly-out menu that opens, tap the required area.

Additionally, in the fly-out **More** menu, it is possible to:

- add or change your photo
- update your password
- open the POS Settings area
- log out



Checking item availability for company

The information on item quantities that are available for the whole company can be found in the **Availability** area of POS Pro. To access the area:

1. Tap **Catalog** in the app's **Home Screen** navigation panel or in the fly-out **More** menu (the location of the button is defined by your custom settings). Tapping **Catalog** opens the **Item Search** screen.

2. Search for the required item.

There are two ways you can search for an item:

a. In the **Item Search** field, enter the item's UPC, PLU, CLU, or your item's description.



b. Tap the **barcode scanning** icon to scan the item's tag.

Once the input has been made, the items matching the search criteria will display. You can sort to find the required item by tapping any of the columns' headers.

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PLU	UPC	Category	Subcategory	Store Description	Color	Size	Offer Price
123456	1234567890120			MELLAH Long Flared Dress	Navy	SML	\$49.99
123457	1234567890120			MELLAH Long Flared Dress	Navy	MED	\$49.99
123458	1234567890120			MELLAH Long Flared Dress	Navy	LRG	\$49.99

3. Tap the required item to open the **Availability** (Real Time Availability, or RTA) view. On initial opening, the top grid in **Availability** displays quantities for the initialized location.

To see item quantities for the whole company, in the **Locations** list at the bottom, tap **Get Other Locations**:

Locatio	ons						Search 🗸
Code	Location	Available	Held	Commit	On Hand	Incoming	Distance 🔺
100	Clearwater Store	14	0	1	13	20	0
101	Tampa Store	18	0	0	18	50	12
Get Other Locations							

Once the list of all store locations appears, tap the **Company** row.

Additionally:

- From Availability, you can <u>print tags</u>. To do so, tap Print Tag in the top right corner of the screen.
 In the Print Tags dialog that opens, you can configure printing settings. It is possible to select a printer, choose a template for your tag as well as specify the number of copies you want to print.
 Having configured the settings, tap Print.
- In **Availability**, you can <u>change the default name of the columns</u>. To do so, tap **Options** in the upper right corner of the view.

Then, in the **Options** dialog that opens, select the column's alias.

Tap **Done** for the changes to take place.



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Checking item availability for company's locations

The information on item quantities that are available for other locations can be found in the **Availability** area of POS Pro. To access the area:

1. Tap **Catalog** in the app's **Home Screen** navigation panel or in the fly-out **More** menu (the location of the button is defined by your custom settings). Tapping **Catalog** opens the **Item Search** screen.

2. Search for the required item by manually entering your item's UPC, PLU, CLU, or any part of the item's description in the **Item Search** field.

Alternatively, tap the **barcode scanning** icon next to the **Item Search** field and scan your item's tag.

Once the input has been made, the items matching the search criteria will display. You can sort to find the required item by tapping columns' headers.

4. Tap the required item to open the **Availability** (Real Time Availability, or RTA) view. On initial opening, the top grid in **Availability** displays quantities for the initialized location.

5. To see item quantities for the whole company, in the **Locations** list at the bottom, tap **Get Other Locations**:

Locatio	ons					Q	Search 🗸
Code	Location	Available	Held	Commit	On Hand	Incoming	Distance 🔺
100	Clearwater Store	14	0	1	13	20	0
101	Tampa Store	18	0	0	18	50	12
			Get Oth	er Locations)		

On tapping, all available store locations appear in the list:

Locatio	ns					٩	Search 🗸
Code	Location	Available	Held	Commit	On Hand	Incoming	Distance 🔺
100	Clearwater Store	14	0	1	13	20	0
101	Tampa Store	18	0	0	18	50	12
102	Orlando Store	22	0	0	22	0	87
103	New York City Store	4	1	2	1	100	879

To search for a store location by location code or location name, tap Search.

For a location's available quantities to be displayed in the top grid, tap the required location in the list.

To hide the **Locations** list, tap the arrow button in the upper right corner.





Orientation to Shipments

In the **Shipments** area of POS, you can manage your store's incoming (for example, Purchase Receipts, ASNs, etc.) and outgoing (for example, Ship Memos, Transfer Orders, Purchase Returns, etc.) documents.

1. To open the area, on the iPad POS app's **Home Screen**, tap the **Shipments** button. According to your custom settings, it can be located:

- in the navigation panel at the bottom
- in the fly-out menu that opens on tapping More



The badge app icon (red circle) next to the **Shipments** button shows a total of outgoing and incoming documents that require your attention.

Once the **Shipments** button is tapped, the documents will appear in the **Shipments** area.

The **Shipments** area consists of three tabs:

- a. **Outgoing:** contains documents with items that go out from your location
- b. Incoming: contains documents with items that your store is receiving
- c. History: contains both incoming and outgoing documents that are finalized

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				Print Options
	Outgoing (6)	Incoming (8)	History	

2. To <u>refresh</u> the information in any of the above tabs, pull the page down.

3. To <u>configure</u> a document's <u>default printing options</u>, tap **Print Options** in the upper right corner of the screen. The settings are configured for a specific document type.



4. To <u>search</u> for documents, use the **Search** field in the upper left corner. You can manually enter **Document #**, **Order #** or any other descriptive element to identify the document. Alternatively, it is possible to use the device camera or scanner.

5. <u>Filtering</u> is available in the **History** tab. By default, the documents that were created within the last 30 days are displayed.

To change the time span, tap **Filter** next to the **Search** field.

6. If you've opened a document in **Shipments** and need to put down your device for a while, you can lock the screen.

••••• 🗧		
Close	Lock Screen	
C)	Document

To do so, when viewing any document, tap Lock Screen.

On tapping, you'll be logged out, while the document will remain open.

When you return, just log back in and you will be brought back to wherever you left in the document.



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Print

Hold

Clear All Remove All

Incoming – Transfer In

Transfer In is used to receive items sent from another location. To update your location quantities, it is required to finalize a Transfer In.

To do so, in POS Pro:

1. Tap **Shipments** in the app's **Home Screen** navigation panel or in the fly-out **More** menu (the location of the button is defined by your custom settings).

2. In **Shipments**, tap **Incoming** at the top of the screen.

Close

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Lock Screer

3. In the Incoming tab, find the required Transfer In (T-IN) and tap to open it.

If the Transfer In has a carton number, scan it or enter in the search field to find an exact match. Alternatively, scan or enter the number of the associated Transfer Order to see all the Transfers In related to it.

Document

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4. Tap Items at the top-right of the screen.

Tapping **Items** will open the list of merchandise that has arrived from another location.

For each item on the list, the **Pack Qty** column displays what the other location has sent to you.

5. Then, you need to receive the items. To do so, perform one of the following:

- In the Item Search field (see the screenshot) enter the item's UPC, PLU, or ALU
- Scan the item's barcode

Receiving the item using any of the above methods will increase that item's **In Qty** value by 1.

C Item Search			2011	Quantity			Remo
UPC	Description 🔺	Color	Size	Season	Pack Qty	In Qty	Diffe
1234567890876	MELLAH Long flared dress	Navy	SML	SS-20	101	101	
1234567890876	MELLAH Long flared dress	Navy	MED	SS-20	100	99	
1234567890876	MELLAH Long flared dress	Navy	LRG	SS-20	98	98	
Navy X	LG SS-20	100	100		0 Clear	Print Tag	Ed
1234567890876	MELLAH Long flared dress	Navy	XXL	SS-20	100	0	
1234567890876	MELLAH Long flared dress	Navy	XSM	SS-20	100	0	
1234567890876	MELLAH Long flared dress	Navy	SML	SS-20	100	0	
1234567890876	MELLAH Long flared dress	Navy	MED	SS-20	100	0	
1234567890876	MELLAH Long flared dress	Navy	LRG	SS-20	100	0	
			Print or	Finalize	\bigcirc	FINALIZ	E

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Incoming - Transfer In

Edit Ou

Items

Alternatively, to receive all the Transfer In items at once, tap the Receive All button (Tapping the

button will automatically match the values of **Pack Qty** and **In Qty**). The button is located on the right above the item list.

Also, it is possible to change the item's **In Qty** manually. To do so, swipe the item row left and tap **Edit**. In the **Edit** dialog that opens, change the **In Qty** value and tap **Save** in the top right corner.

6. Tap **Finalize** to update the quantities at your location.

ancel	Edit		Sar
CYBICLETTE Pants			
UPC: 3415180618810		PLU:	124
		STYLE: CO	0005664
Pack Qty			1
In Qty			0
Difference Qty			-1



Outgoing – Transfer Order

Transfer Order is a <u>request</u> to your location to send out inventory to another location.

To confirm changes in item quantities and finish processing a Transfer Order, you will need to finalize it.

To do so, in POS Pro:

1. Tap **Shipments** in the app's **Home Screen** navigation panel or in the fly-out **More** menu (the location of the button is defined by your custom settings).

- 2. In the Shipments area, tap Outgoing at the top of the screen.
- 3. In the **Outgoing** tab, find the required Transfer Order (TO) and tap to open it.
- 4. In the **Document** tab of the

Transfer Order:

- select a ship method (required)
- enter the tracking number of your transfer (required)

5. Then, tap **Items** located at the top right of the screen.

6. Tapping **Items** will display the list of items that are to be sent out to another location.

••••• 🗢 Close Lock Screen	9:41AM Outgoing - Transfer Order en 12/33:456/7898/4					
Docu	iment		ltems		_	
Q Search	Edi	t Quantity 🧲	Transfer All	Reject All	Clear All	Remove All
Item	Color	Size	Pack Qty	In Qty	In Qty	Difference
MELLAH Long flared dress	Navy	SML	40	0	0	-40
MELLAH Long flared dress	Navy	MED	50	0	0	-50

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Close	Lock Screen	Outgoing - Transfer Out Screen 1233456789874				
		Document	Items			
	DET	AILS				
	Тур	9	Transfer Order			
	Orde	er#	123			
	То		ALONA_3PRO			
	Trar	nsfer Reason	Select (required)	_		
	Ship	Method	Select (required)			
	Trac	king Number	Tracking number required			
	Last	Edited				

In Items, you can do the following:

• Tap **Transfer All** to include all the Transfer Order quantities (**Out Qty** will equal **Ord Qty** for each item)

• Tap **Reject All** if you are unable to transfer any items (**Rej Qty** will equal **Ord Qty** for each item)

Quantity modifications are available for individual items as well. Scan in your item or enter the item's UPC, PLU, or ALU into the **Item Search** field. If the item is found, the item's **Out Qty** value will be increased by 1.

Also, it is possible to swipe the item row left and change **Out Qty**, **Reject Qty**, and **Reject Reason**. Once done, tap **Save** in the **Edit** dialog.

6. Tap Finalize.

Outgoing – Creating a Transfer Out

Transfer Out contains items that your store is sending to another location. In POS Pro, it is possible to create a Transfer Out without a Transfer Order.

To do so, in POS Pro:

1. Tap **Shipments** in the app's **Home Screen** navigation panel or in the fly-out **More** menu (the location of the button is defined by your

custom settings).

2. In the **Outgoing** tab, tap **New Outgoing**.

3. In the **New Outgoing** dialog that opens, define the target location and tap **Create** in the upper right corner.

4. Once the Transfer Out has been created, its **Document** tab will display. In that tab, indicate:

Lock Screen

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Close

- transfer reason
- ship method
- tracking number

5. Tap **Items** to open the **Items** tab.

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Initially, the **Items** tab contains no items. There are two ways you can add items to the list:

scan the item's barcode (preferred)

36

• enter the item's UPC, PLU, CLU, or your item's description in the Item Search field

6. You can scan each item (multiple quantities), or once an item has been added, you can manually configure its **Out Qty**. To do so, swipe the required item row left and tap **Edit**.

7. If necessary, to print tags for all items or a mailing label, tap Print in the upper right corr	ner
of the screen.	

Print on Finalize

Also, to automatically print a transfer memo on finalizing, turn the **Print on Finalize** switch on.

8. To save the Transfer Out without finalization, tap **Hold** in the upper right corner. On tapping, the Transfer Memo Out is automatically sent to the email address defined for that location in CHQ.

9. Tap **Finalize**.







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Outgoing - Transfer Out



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Edit



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Hold Print

Remove All

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Incoming – Purchase Receipt without Purchase Order

A Purchase Receipt (PR) is used to add items received from a vendor to inventory.

Usually, a Purchase Receipt will be created automatically once a Purchase Order (PO) is finalized. In that case, the resulting PR is associated with that PO.

In POS Pro, however, it is possible to create and finalize a new PR without an existing PO.

To do so, in POS Pro:

1. Tap **Shipments** in the app's **Home Screen** navigation panel or in the fly-out **More** menu (the location of the button is defined by your custom settings).

2. In Shipments, tap Incoming at the top of the screen.

3. In In	coming , ta	ap Ne	ew Purcl	hase
Receipt.	Tapping	the	button	will
open the	Vendor d	lialog	•	

se					Print Options
ill		Outgoing (6)	Incoming (8)	History	
	Q Item Search	(111)		+ New P	urchase Receipt

4. In the **Vendor** dialog, find and then tap the required vendor. Once selected, you will be redirected to the **Incoming – Purchase Receipt** area.

5. Under Incoming – Purchase Receipt, tap Items.

6. Add the items to the Purchase Receipt by scanning their bar codes.



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CYBICLETTE Pants

UPC: 3415180618810

Edit Quantity

Incoming - Purchase Receipt 10623000139

Items

to add items to the documen

Alternatively, enter the item's UPC, PLU, or CLU in the Item Search field.

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Close Lock Screen

Q Item Search

Receiving the item via any of the above methods will increase that item's **Receive Qty** by 1.

Also, you can change

the item's **Receive Qty** manually. To do so, swipe the item row left and tap **Edit**.

In the **Edit** dialog that opens, change the **Receive Qty** value. After that, tap **Save** in the top right corner of the dialog.

Additionally, you can transfer all the items right from the Purchase

Receipt to another location. To do so, tap Transfer. Then, in the Transfer tab that opens, turn the

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Automatically Transfer Out switch ON and fill out the required fields (To, Ship Method, Tracking #).

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Close Lock Screen	Incoming - Purchase Rece 10623000139	ipt	Hold Print
Documen	t Items	Transfer	

The above allows for the automatic

creation of a Transfer Out upon the Purchase Receipt's finalization.

7. Tap Finalize.



Incoming – ASN

Advanced Shipping Notice (ASN) contains merchandise that a vendor is sending to your store. On finalizing an ASN, a Purchase Receipt associated with that ASN is created.

To finalize an ASN, in POS Pro:

1. Tap Shipments in the app's Home Screen navigation panel or in the fly-out More menu (the

location of the button is defined by your custom settings).

In Shipments, tap Incoming at the top of the screen.

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	Outgoing (6)	Incoming (8)	History	
Q Item Search	(III	C	+ New F	urchase Receipt

3. In the **Incoming** tab, find the required ASN and tap to open it.

4. Tap **Items** at the top of the screen.

Tapping **Items** will open the list of merchandise that has arrived from the vendor/manufacturer.

For each item on the list, the **Pack Qty** column displays what the vendor/manufacturer has sent to you.

5. Then, you need to confirm receiving the items. To do so, perform one of the following:

- Scan the item's barcode
- In the **Item Search** field enter the item's CLU, UPC, or PLU

Receiving the item via any of the above methods will increase that item's **Receive Qty** by 1.

6. Alternatively, to receive all the items at once, tap the **Receive All** button on the left above the item list.

Tapping the button will automatically

match the values of Pack Qty and Receive Qty.

7. Also, it is possible to change the item's **Receive Qty** manually. To do so, swipe the item row left and tap **Edit**. In the **Edit** dialog that opens, change the **Receive Qty** value and tap **Save** in the top right corner.

<u>Additionally</u>, you can transfer all the items right from the ASN to another location. To do so, tap **Transfer.** Then, in

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Close Lock Screen		Incoming - ASN 1100000091		Hold Print
	Document	Items (0 of 2)	Transfer	
Q Item Search	(m)		Edit Quantity Receive A	I Clear All

the **Transfer** tab that opens, turn the **Automatically Transfer Out** switch ON and fill out the required fields (**To**, **Ship Method**, **Tracking #**).

The above allows for the automatic creation of a Transfer Out upon the ASN's finalization.

8. Tap Finalize.

Close Lo	ock Screen		Incomi	ing - ASN 000091				d Print
	Documer	nt	Items	(0 of 2)		Transfer		
Q Item 5		5000			Edit Qu	uantity	Receive All	lear All
Item		Color S	ize			Pack Qty	Receive Diff	erence
BLANC	42		1	0	-1	Clear Prin	t Ticket Print Tilg	Edit
Ø	ALILAS Shirt Long Slev ALILAS 1390, 44	BLANC 4	4			1	0	-1
				Print on Finalize			FINALIZE	



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Hold Print

+ New Outgoing

Outgoing – Purchase Return

Purchase Return (RET) is used to remove items from inventory for shipment back to the vendor.

To create a Purchase Return, in POS Pro:

1. Tap **Shipments** in the app's **Home Screen** navigation panel or in the fly-out **More** menu (the location of the button is defined by your custom settings).

- 2. In **Shipments**, tap **Outgoing** at the top of the screen.
- 3. In Outgoing, tap New Outgoing.

4. In the **New Outgoing** dialog that opens, select **Purchase Return** in the **Type** field. Then, select the vendor and tap **Create** in the upper right corner.

5. Once the Purchase Return has been created, its **Document** tab will display. In that tab, indicate the required ship method and tracking number.

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Close Lock Screen

6. Tap **Items** at the top-right of the screen.

7. Initially, the **Items** tab contains no items. There are two ways you can add items to the list:

- scan the item's barcode (preferred)
- in the Item Search field, enter the item's UPC, PLU, CLU, or your item's description

Document

8. You can scan each item (multiple quantities), or once an item has been added, you can manually configure its **Return Qty**. To do so, swipe the required item row left and tap **Edit**.

DETAILS

Remove All					Options	Q Pants	[]
ltem			Attribute 1	Attribute 2	Attribute 3		Return Qty
	2188	36				-1 Remove	Print Tag Edit

9. If necessary to print a Purchase Receipt or tags for all items, tap **Print** in the upper right corner.

10. Also, to automatically print any of the above on finalizing, turn the **Print on Finalize** switch on.



11. Tap **Finalize**.



Items

History

Outgoing - Purchase Return



Print Options

+ New Purchase Receipt

History

Incoming – Purchase Receipt on Purchase Order

A Purchase Receipt is automatically created on finalizing the receipt of merchandise on a Purchase Order (PO). The resulting Purchase Receipt is associated with that Purchase Order.

To receive against a Purchase Order, in POS Pro:

1. Tap **Shipments** in the app's **Home Screen** navigation panel or in the fly-out **More** menu (the location of the button is defined by your custom settings).

Outgoing (6)

2. In **Shipments**, tap **Incoming** at the top of the screen.

3. In	the	Incoming	tab,	find	the	Q Item
requi	red P	urchase Or	der a	nd tai	o to o	pen it.

4. Tap **Items** at the top of the screen.

Tapping **Items** will open the list of merchandise that has been ordered from the vendor.

5. Then, you need to confirm receiving the items. To do so, perform one of the following:

- Scan the item's barcode (preferred)
- In the **Item Search** field, enter the item's UPC, PLU, or ALU

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Close Lock Screen		Incoming - PO 100000025		Hold Print
	Document	Items (0 of 1)	Transfer	
Q Item Search			Edit Quantity Receiv	e All Clear All
Item	Color	Size	Pack Qty Receive.	. Difference
IOIR S		1 0	-1 Clear Print Ticket Pr	int Tag Edit
				<u> </u>
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		Print on Finalize	FINALIZ	ZE

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Incoming (8)

Receiving the item via any of the above methods will increase that item's **Receive Qty** by 1.

Alternatively, to receive all the items at once, tap the **Receive All** button on the right above the item list. Tapping the button will automatically match the values of **Order Qty** and **Receive Qty**.

6. Also, it is possible to change the item's **Receive Qty** manually. To do so, swipe the item row left and tap **Edit**. In the **Edit** dialog that opens, change the **Receive Qty** value and tap **Save** in the top right corner.

<u>Additionally</u>, you can transfer all the items right from the Purchase Receipt to another location. To do

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Close Lock Screen		Incoming - PO 100000025		Hold Print
	Document	Items (0 of 1)	Transfer	
Q Item Search		IC .	Edit Quantity Re	ceive All Clear All

so, tap **Transfer.** Then, in the **Transfer** tab that opens, turn the **Automatically Transfer Out** switch ON and fill out the required fields (**To**, **Ship Method**, **Tracking #**).

The above allows for the automatic creation of a Transfer Out upon the Purchase Order's finalization.

7. Tap Finalize.



Orientation to Adjustments

In the **Adjustments** area of POS Pro, it is possible to create and manage Adjustment Memos. Adjustment Memo allows you to change quantities of your store's merchandise that has been stolen, damaged, found, etc.

To access the Adjustments area in POS Pro:

1. Tap **Adjustments** in the app's **Home Screen** navigation panel or in the fly-out **More** menu (the location of the button is defined by your custom settings).

Once the icon is tapped, the list of existing Adjustment Memos will open.

2. To <u>refresh</u> the information displayed, pull the page down.

3. To create a new Adjustment Memo, tap **New Adjustment** in the upper right corner.

4. To <u>search</u> for memos, use the **Search** field in the upper left part of the screen. You can scan in the memo or manually enter your document's **Memo #** or **Universal #**.

5. To <u>select the time span</u> for which historical Adjustment Memos will display, tap **Filter** next to the **Search** field. By default, the memos created within the last 30 days are displayed.

		Adjustmer	ate		Print Options
Close	Q Search		1.5	+ New A	Adjustment
Last 30 Days		8 Documents	Found		
Memo #	Universal #	Date / Time	Status	Associate	Line Items
12345	10413000040	03/01/2020 / 09:14 AM	Posted	Sara T.	1
12345	10413000040	03/01/2020 / 09:14 AM	Posted	Sara T.	1
12345	10413000040	03/01/2020 / 09:14 AM	Posted	Ron S.	2
12345	10413000040	03/01/2020 / 09:14 AM	Posted	Jeffrey S.	1
12345	10413000040	03/01/2020 / 09:14 AM	Posted	Devan M.	1
12345	10413000040	03/01/2020 / 09:14 AM	Posted	Ron S.	1
12345	10413000040	03/01/2020 / 09:14 AM	Posted	Devan M.	1
12345	10413000040	03/01/2020 / 09:14 AM	Posted	Devan M.	2

6. Adjustment Memos are available with the following statuses:

- Held: displays if a document is held; it is possible to edit and discard such memos
- Posted: displays if a document is finalized; it is possible to only view such memos
- Editing: displays if the document has been opened for editing and not closed; it is possible to edit such memos

To view, edit, or discard a memo, swipe that memo's row left and tap the corresponding button.

7. To configure the memos' default printing options, tap **Print Options** in the upper right corner of the screen.



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Adjustment Memo creation

Adjustment Memos are used to record changes in quantities of the merchandise if, for example, some of your store's items have been stolen, damaged, found, or returned to another store.

To create an Adjustment Memo, in POS Pro:

1. Tap **Adjustments** in the app's **Home Screen** navigation panel or in the fly-out **More** menu (the location of the button is defined by your custom settings).

	100%
	Print Options
+	New Adjustment

2. In the **Adjustments** area, tap **New Adjustment** at the top-right.

3. On tapping **New Adjustment**, select the required adjustment reason. Once the reason is selected, the **Document** tab of the created Adjustment Memo will open.

4. Tap **Items** at the top-right.

Initially, the **Items** tab contains no items. There are two ways you can add items to the list:

- scan the item's barcode (preferred)
- enter the item's UPC, PLU, CLU, or your item's description in the Item Search field
- 5. To manually specify **Adjustment Qty**, swipe left the item's row and tap **Edit**.

Once the quantity is indicated, it is possible to set the value to be positive or negative. To do so, in the **Edit** dialog, tap the **+/-** button on the numeric keyboard.

Once done, tap Save.

Alternatively, to set the item value to either positive or negative by default, tap the **Options** button next to the **Search** field. In the **Default Item Value** field of the **Options** dialog that opens, select the required option.

•••••		9:4
Close Lock Screen		Adjus 123345
	Document	
Q Item Search	5mm2	Options

6. If required, to print the Adjustment Memo, tap **Print** in the upper right corner.

Also, to automatically print the Adjustment Memo on posting, turn the **Print on Post** switch on.

7. Tap Post.

Close	Lock Screen		Adjustments 10627000002		Hold Print
		Document		Items (1)	
Q Item S	Search	[IIII] Options			Remove All
Item		Color	Size		Adjustme
INDIGO/ WHITE	34			-1 Remove Print Tag	Print Ticket Edit
			Print on Finalize	FINA	LIZE



Outgoing – Store Pickup finalizing

A Store Pickup Memo (PKUP) contains merchandise that a customer will pick up from your store.

To finalize a Store Pickup Memo, in POS Pro:

1. Tap **Shipments** in the app's **Home Screen** navigation panel or in the fly-out **More** menu (the location of the button is defined by your custom settings).

2. In **Outgoing**, find the required Pickup Memo (PKUP) and tap to open it.

3. Tap Items at the top of the screen.

Tapping Items opens the list of merchandise that the customer will pick up.

4. Mark the items either as picked up or rejected.

To do so, at the top right of the screen, tap Pick Up All to mark all the Pickup Memo items as picked up or Reject All to reject those.

8:08 PM Thu May 28 Outgoing - Ship Memo Close Lock Screen Print 100000053 Items (0 of 3) Pick Up Document Q Search Pick Up All Sout: Options Reject All Pick Up Item Coloi Size Ord Qty Rej Qty INDIGO/ 3 0 0 Print Tag Edit WHITE Print on Save

On tapping **Reject All**,

the Pickup Memo will be saved with the "Rejected" status.

Alternatively, it is possible to pick up or reject each item manually. To do so, swipe an item's row left and tap the blue Edit button.

In the Edit dialog that opens, define Ship Qty, Reject Qty and Reject Reason.

5. Tap **Print** in the upper right corner of the screen to select and print one of the documents: a Pick List, Packing Slip, or Pick Up Label.

To automatically print the selected document on saving, turn the **Print on Save** switch on.

Additionally

When the merchandise is being collected, it is possible to capture the customer's signature. To do so, tap Pick Up at the top-right of the Outgoing – Ship Memo screen. Then, in the Pick Up tab, select Tap to Capture Customer Signature. Once a signature is drawn, tap Accept Signature.

6. Tap **Pick Up Ready** once the order has been prepared and is ready for pick-up.

Tap **Picked Up** once the order has been picked up by the customer.



Outgoing – Ship Memo finalizing

A Ship Memo (SHIP) contains merchandise that needs to be shipped to a customer.

To finalize a Ship Memo, in POS Pro:

1. Tap **Shipments** in the app's **Home Screen** navigation panel or in the fly-out **More** menu (the location of the button is defined by your custom settings).

2. In **Outgoing**, find the required Shipment Memo (SHIP) and tap to open it.

3. Tap **Items** at the top of the screen.

Tapping **Items** opens the list of merchandise that needs to be shipped to the customer.

4. Mark the items either as shipped or rejected.

To do so, at the top right of the screen, tap **Ship All** to mark <u>all</u> the Ship Memo items as shipped or **Reject All** to reject those.

On tapping **Reject All**, the Ship Memo will be saved with the "Rejected" status.

3:09 PM Thu May	28								奈 45% ■
Close L	ock Screen			- Outgoing 10000	Ship Memo				Print
		Document		Items	(0 of 2)		Shipment		
Q Search		5mC	Options					Ship All	Reject All
ltem			Color	Size			Ord Qty	Ship Qty	Rej Qty
ok					2	0	0	Reject Pri	nt Tag Edit

Alternatively, it is possible to ship or reject each item manually. To do so, swipe an item's row left and tap **Edit**.

In the Edit dialog that opens, define Ship Qty, Reject Qty and Reject Reason. Once done, tap Save to confirm changes.

5. Tap **Shipment** at the top-right of the screen. If your **Delivery Method** is "Manual Ship", define

8:09 PM Thu	May 28			奈45%■
Close	Lock Screen	Outgoing - Ship Memo 1000000052		Print
_	Document	Items (0 of 2)	Shipment	_

Ship Method and **Tracking #**. If "ShipStation" or "ShippyPro", define the weight and dimensions of the package and tap **Get Label**.

6. Optionally, tap **Print** in the upper right corner of the screen to select and print one of the documents: a Pick List, Packing Slip, Shipping Label, or Mailing Label.

To automatically print the selected document on saving, turn the **Print on Save** switch on.

7. Tap Shipped.



Outgoing – Creating multiple Transfers Out against a Transfer Order

Transfer Out (T-Out) contains items that your store is sending to another location. In POS Pro, it is possible to create multiple Transfers Out on finalizing a Transfer Order (TO).

The resulting number of Transfers Out will be the same as the number of cartons on the document that you define for packing the merchandise.

To assign a carton number to an item:

1. Tap **Shipments** in the app's **Home Screen** navigation panel or in the fly-out **More** menu (the location of the button is defined by your custom settings).

- 2. In **Outgoing**, find and tap the required Transfer Order (TO).
- 3. Tap **Items** at the top-right.
- 4. Swipe left the row of the item you are assigning a carton number to and tap Edit.

On tapping, the item Edit dialog opens.

Firstly, in the **# of Cartons** field, define the total number of cartons in which that item will be packed (valid values are *1* to *999*).

Then, in each **Carton #** field, define the sequence number of a carton (valid values are 1 to 999).

One sequence number can be assigned for two different items on the document. However, it's not possible to use one sequence number twice for one item.

Also, in each **Quantity** field, define the item quantity that

will be packed in the corresponding carton. The sum of all **Quantity** fields displays in the **Out Qty** field below. If **Out Qty** is less than **Order Qty**, you will need to define a reject reason.

5. Once done, tap **Save** in the upper right corner of the dialog. The assigned cartons display in the item's row:

Item	Attr1 (A1)	Attr2	Ord Qty	Rej Qty	Out Qty	Difference
UPC Description 4 • Carton #: 1, 2	White	Med	9,999,999	9,999,999	9,999,999	9,999,999

6. To print multiple Transfer Memos on finalizing, in the **Items** tab, turn the **Print on Finalize** switch on.

7. In the **Items** tab, tap **Finalize** at the bottom-right.

Cancel	Ed	dit		Save
Item Store Description	Field			
UPC: 01234567890	123		PLU: STYLE:	
# of Cartons Carton #		Quantity		1 0
Order Qty				3
Out Qty				0



Finalizing documents with acknowledgement

In POS Pro, finalizing certain documents may require entering your credentials (manager override) and/or capturing your signature. Such documents include Transfer Order, Transfer In, and Transfer Out, Purchase Order, Purchase Receipt, and Purchase Return as well as Adjustment Memo.

To finalize a document when acknowledgement is required:

1. Tap Finalize or Post in the document (depending on your document type).

On tapping, the **Acknowledgement** dialog with several acknowledgement statements displays:



2. Select the required statement and tap **Continue** in the upper right corner of the dialog.

3. Then, if manager override is required, the **Manager Override** dialog displays. In the dialog, enter your username and password and then tap **Log In**.

Please note that to perform the manager override, you must be granted with the **Allowed to** acknowledge transaction right.

4. If capturing signature is required, the dialog for drawing a signature displays next:

88848 Ÿ	S:41.8M Capture Signature	100% 💼
Cancel	Captore Signature	
	Customer acknowledges this merchandise has been received.	
X		
	Clear Signature Accept Signature	

In the dialog, draw your signature in the blank space.

5. Once done, tap **Accept Signature** at the bottom of the dialog. Alternatively, tap **Clear Signature** to start the signature over.



Orientation to Count Memos

In the **Count Memos** area of POS Pro, you can view, create, edit, and archive Count Memos. A Count Memo (CM) is a document that records changes in merchandise quantities for the initialized location.

To open the Count Memos area in POS Pro:

1. Tap **Count Memos** in the app's **Home Screen** navigation panel or in the fly-out **More** menu (the location of the button is defined by your custom settings).

On tapping, the list of all Count Memos for the initialized locations opens.

2. To refresh the information displayed, pull the page down.

3. To create a new Count Memo, tap **New Count Memo** in the right upper corner.

4. To search for Memos, use the **Search** field in the left upper corner. You can search by **Count ID** and **Description**.

5. Count Memos are available with the following statuses:

•••••		9:41 AM Count Memos			100% Filter
Q Search				+ New Cour	nt Memo
Count ID	Description	Count Date / Time	Status	Items	Difference
4PTWB6F	Summer 2020 Dresses	03/01/2020 / 09:14 AM	Editing	400	
4PTWB6F	Spring 2020 Jackets	03/01/2020 / 09:14 AM	Open	2,167	·
4PTWB6F	Mens Accessories	03/01/2020 / 09:14 AM	Finalized	812	2
4PTWB6F	Spring 2020 Shoes	03/01/2020 / 09:14 AM	Adjusted	166	
\sim				E C	

- Open: the memo has been just created
- *Editing*: the memo is being edited
- Finalized: the memo has been finalized
- Adjusted: an Adjustment Memo has been created for that Count Memo

7. To edit a Count Memo, tap the row with that memo.

If you try to edit a memo that is open on another device, the **Document is Being Edited** dialog displays.

In the dialog, if you select **Continue to Edit**, changes made to the memo on another device will be lost.



€ 43%

Count Memo creation

A Count Memo (CM) is a document that records changes in merchandise quantities for the initialized location.

In POS Pro, to create a Count Memo:

1. Tap **Count Memos** in the app's **Home Screen** navigation panel or in the fly-out **More** menu (the location of the button is defined by your custom settings).

2. Once the list of Count Memos is open, tap **New Count Memo** in the upper right corner.

In the **New Count Memo** dialog that opens, fill out the fields in the **FILTER** section to only include items with specific properties into the memo.

Alternatively, leave the fields blank to include all catalog items in the memo.

Once finished, tap **Save** in the upper right corner.

3. Once the resulting Count Memo opens, tap **Items** at the

top. In the **Items** tab, there are two ways to search for an added item: Close Lock Sc

• enter that item's ID in the **Item Search** field in the upper left corner

• tap the **barcode scanning** button and scan an item

To filter items by quantity difference or override quantity, tap **Filter** next to the **Item Search** field.

4. In the **Items** tab, you can only edit **Override Qty** and delete item scans.

To do so, tap the required item row. Once the **Edit** dialog opens, in the

Quantity tab, enter the required **Override Quantity**. Please be advised that Override Quantity is given priority over the count quantity when quantity difference is determined.

To delete an item scan, in the **Edit** dialog, tap **Scans**. In the **Scans** tab, tap the required item row and then tap **Delete Scan**. Once done, tap **Save** in the upper right corner.

5. It is possible to delete all item scans associated with one zone in the **Zones** tab. To do so, in the **Zones** tab, tap the required row and then select **Delete Zone Scans**.

6. Once finished configuring the memo, tap **SAVE** at the bottom to save changes and close the memo.

To assign the "Finalized" status to the memo (no further edits will be possible), tap **Finalize**. To archive the memo (an archived memo can only be viewed), tap **Archive**.



Close Lo	ock Screen			Memo IGY7			Create Adjustn		Archive
Doo	cument Ite	ms	Sc	ans	Zone	es	Unre	ecogn	ized
Q Item !		(IIII)	Filter						
Item		Color	Size	Ledger Qty	Co	ount	Override Qty	Dif	ference
DIEGO 5 DIEGO 3510, 38	Shirt Long sleeves NAVY	38		0	0			0	Edit
	BRITANY Jumper BRITANY 0008, XS	NOIR	XS	0		0			0
Q	ICEVE MOHAIR V NECK ICEVE 4025, XL	RIO RED/ OFF WHITE/ PEACOAT	XL	0		0			0
	ARLOTA Dress Long sl ARLOTA 3202, 38	MAJORELL E	38	0		0			0
50515 Ite	ms	First Pr	ev Page: 1	of 1011 Next La	ast				
Count	Report			S	AVE		FINA	LIZE	



Performing adjustments from Count Memo

In POS Pro, it is possible to create an Adjustment Memo from a Count Memo. The Adjustment memo updates the stock ledger quantities based on the Count Memo item difference.

To create an Adjustment Memo from a Count Memo:

1. Tap **Count Memos** in the app's **Home Screen** navigation panel or in the fly-out **More** menu (the location of the button is defined by your custom settings).

2. In Count Memos, tap the required Count Memo to open it.

3. In the required Count Memo, tap **Create Adjustment** at the top. On tapping, the **Create Adjustment** dialog opens:

Cancel	Create Adjustment	Creat
POSITIVE ADJUS	STMENTS	
Items		22
Quantity		395.6
NEGATIVE ADJU	STMENTS	
Items		48
Quantity		877
Adjustment Mem	o Reason	Select (required)
Automatically Arc	hive Count Memo	

In the Create Adjustment dialog that opens:

- the **Items** fields show the number of PLUs affected
- the **Quantity** fields show the total item quantity being adjusted

To define a reason for adjustment, tap **Select** in the **Adjustment Memo reason** field (required).

Optionally, to archive the Count Memo on creation of the Adjustment Memo, toggle the **Automatically Archive Count Memo** switch on.

Once done, tap **Create** in the upper right corner of the dialog.



Finalizing Ship Memos with ShippyPro integrated

A Ship Memo can have ShippyPro defined as the shipping service. Then, in the **Shipment** tab, ShippyPro displays as **Delivery Method**.

To finalize a Ship Memo with ShippyPro:

1. Tap **Shipments** in the app's **Home Screen** navigation panel or in the fly-out **More** menu (the location of the button is defined by your custom settings).

2. Once the **Outgoing** area of **Shipments** is open, find and tap the required Ship Memo.

3. In the Ship Memo, tap **Shipment** on the upper-right.

In the **Shipment** tab, enter the weight of your package in the **Weight** fields (<u>required</u>).

To select weight units, tap **Options** on the upper-right.

Then, enter the size of the package in **Dimensions** (required).

Alternatively, to automatically fill out **Dimensions**, tap the required label of a default box size:

Dimensions (inches) Box Label 3 Box Label 1 Box Label 2 Box Label 4 Box Label 5 Box Lal

4. To change the ship-to address of the Ship Memo, tap **EDIT** next to the **Ship To** field. It is only possible to edit the ship-to address before the shipping label is retrieved.

SHIPPING INFO		
Ship From	Ship To CEDIT	Label Preview
Store Name	First Name Last Name	10000- 1
Address 1	Company Name	Constant user constant user (The Constant Constant user) constant user constant user

5. Then, tap **Get Label**. On tapping, both shipping label and return shipping label are retrieved.

On retrieving, in the **Label Preview** section, a preview of the shipping label displays.

6. To void labels and edit the **Weight** and **Dimensions** fields again, tap **Void Labels** in the **Tracking #** field.

7. To print the shipping label or return shipping label, tap **Print** on the upper-right.

8. Once finished, tap **Shipped** on the bottom-right to finalize the Memo.



	100%
	Print
Shipment	
	Options
	FedEx



Printing an item ticket

In POS Pro, it is possible to print a ticket for an item without saving the whole document. The ticket can contain important information about the item, for example if it is damaged.

It is possible to print item tickets in the following documents:

- Transfer Out, Transfer Order, Transfer In
- Purchase Receipt, Purchase Return, Purchase Order
- ASN
- Adjustment Memo

To print an item ticket:

- 1. Open the required document in **Shipments** or **Adjustments**.
- 2. In the document, tap **Items** at the top.
- 3. In Items, swipe left the required item row. Then, tap Print Ticket:

01	23456789	0125 MELLAH L	ong flared dress	Mauve LRG	SS	19	98	0 98	0
uve	XLG	SS 19	100	0	-100	Clear	Print Tag	Print Ticket	Edit
01	23456789	0126 MELLAH I	long flared dress	Mauve XLG	SS	19	100	0 0	-100

Alternatively, to add notes to the item ticket, swipe left the item row and then tap Edit.

In the Edit dialog, fill out the Notes field and then tap Print Ticket:

Custom Text 1	Add
Custom Lookup 1	Select
Notes	
Clear All	Print Ticket

Additionally

To configure default settings for printing an item ticket, in **Shipments** or **Adjustments**, tap **Print Options**:

	Print Options
History	
	New Purchase Receipt

In the **Printing Options** dialog that opens, choose the required type of ticket (**Transfer Item Ticket**, **Purchasing Item Ticket**, or **Adjustment Item Ticket**) and configure the settings.



Orientation to the Customer area

In the **Customer** area of POS Pro, you can add new customers as well as search for and edit existing customer profiles.

1. To open the **Customer** area, on POS **Home Screen**, tap **Customer**. The **Customer** button is located either in the navigation panel at the bottom or in the **More** menu depending on your settings. On tapping, the **Customer** main page opens.

2. To search for customers, use the **Customer Search** field at the top.

To define by which field to search, tap **All** next to the search field.

Alternatively, tap **Scan with Camera** to scan the customer's member code.

3. To open the full customer profile, in the list of search results, tap the row with the required customer. Once opened, the profile can be edited.

••••• ?			9:41 AM		100%
Close			Customer		
All	Q Jo		Clear (IIII) Sca	n with Camera	New Customer
Member Code	Last	First	E-Mail	Phone	
2B3C78J90	<mark>Jo</mark> hnston	Elizabeth	lizzaj0192@gmail.com	503-222-9876	See More
E12G00L12 John Smith (Spouse)	Smith	Tonya	tsweets@gmail.com	541-333-2010	See More
2B3C78J90	<mark>Jo</mark> seph	<mark>Jo</mark> seph	jx2@gmail.com	None	See More
E12G00L12	<mark>Jo</mark> seph	Rick	rick. <mark>jo</mark> seph@gmail.com	503-321-3332	See More
2B3C78J90 John Joyce (Brother),	Joyce Mathew Joyce (Son)	Judy	therealjudge@gmail.com	701-202-5468	See More
E12G00L12	<mark>Jo</mark> yce	Trish	wishuweretrish@gmail.com	808-587-9076	See More
6 Record(s) found	ł				

Also, to view basic read-only information about a customer, tap **See More** in the required row.

4. To add a new customer, tap **New Customer** in the upper right corner. On tapping, the **New Customer** dialog opens:

GENERAL INFORMATION		
First (Required)	Middle	
Last (Required)	Title	
BIRTHDATE	GENDER	
Select	Select	
Company	Other	
Mobile	Phone 2	
Email (Required)		TRANSACTIONS
Primary Address		>

In the dialog, you can enter basic customer information and then tap **Add** in the upper right corner. Alternatively, to include additional information, tap **Edit Full Form** at the bottom.



Configure customer opt-in preferences

In each customer profile in POS Pro, it is possible to indicate the following:

- if the customer agreed to receive information via the phone, email, or mail
- if the customer's mobile phone and postal address are valid
- if the customer's loyalty points are converted to rewards

To do so, in POS:

1. On **Home Screen**, tap **Customer** in the navigation panel at the bottom or in the **More** menu. On tapping, the **Customer** main page opens.

2. In the **Customer** main page, search for the required profile via the **Customer Search** field.

3. In the list of search results, tap the row with the required customer. On tapping, the customer's full profile opens.

To indicate that the customer allowed calling or sending texts on their phone number, turn on the **Calls** or **SMS** switch next to the required phone number.

To indicate if the customer's mobile phone is valid, configure the **Validated** field next to the switches.

MOBILE (REQUIRED)	validated Valid	CALLS	SMS
PHONE 2		CALLS	SMS

To indicate if the customer allowed sending emails about upcoming sales and promotions (**Marketing**) or with purchase receipts and shipping information (**Transactions**), turn on the **Marketing** or **Transactions** switch respectively next to the required email:

PRIMARY EMAIL (REQUIRED)	MARKETING	
EMAIL 2	MARKETING	

To enable the conversion of the customer's loyalty points to rewards, turn on the **Customer Loyalty Opt In** switch.

To indicate that the customer allowed sending mail to their postal address, under **Postal Address**, tap **Edit**.

POSTAL ADDRESS		
		EDIT
	Accepts Mail	⊘ Valid Address

In the **Postal Address** dialog that opens, turn on the **Mail Opt In** switch. Also, to mark the address as valid, configure the **Validation** field below.



Monday, December 12

Orientation to Drawer Memo

In the **Drawer Memo** area, it is possible to create, edit, and finalize Drawer Memos. Drawer Memos are documents that record all of the incoming and outgoing money within the store.

9:41 AM

1. On the POS **Home Screen**, the status of the current Drawer Memo displays on the right. The following statuses are possible:

• Active: the Memo has been created via the Start of Day process; sales can be performed and recorded against that Memo

• **Inactive**: the Memo hasn't been finalized via the End of Day process and expired; it is required to reactivate the Memo or create a new one to perform sales

2. To open the **Drawer Memo** area in POS, on the **Home Screen**, tap **Drawer Memo**.

The **Drawer Memo** button can be located in the navigation panel at the bottom or in the **More** menu depending on your settings. On tapping, the **Drawer Memo** list view opens.

The **Drawer Memo** list view includes two tabs:

- Drawer Memo: contains active and inactive Memos
- History: contains finalized Memos

4. To configure default printing settings for a **Drawer Memo** or a **Deposit Slip** (records the amount of cash on a deposit made against a Memo), tap **Options** in the upper right corner of the screen.

```
Also, to open the cash drawer, tap Options in the upper right corner and then Open Cash Drawer.
```

lose				9:41 AM Drawer Memo			
lose	_	Drawer Memo (2)			30)	Options	
1emo #	Status	Drawer Station	Started	Started By	Finalized	Finalized By	
2345	Active	100-1	03/01/2020 09:14 AM	Michael			
2344	Inactive	100-1	03/01/2020 09:14 AM	Jeff			

5. If there is no active Drawer Memo at the moment, it is possible to create a new one.

To do so, in the **Drawer Memo** tab, tap **Start New Drawer Memo**. On tapping, the Start of Day process begins.



Drawer Memo – Start of Day

The **Start of Day** (SOD) process allows for counting cash at the store opening as well as recording any discrepancies with the closing count of the previous Drawer Memo.

To create a new Drawer Memo and start the SOD process, in POS:

1. On the **Home Screen**, tap **Drawer Memo**. The **Drawer Memo** button can be located in the navigation panel at the bottom or in the **More** menu depending on your settings. On tapping, the **Drawer Memo** area opens.

2. In the **Drawer Memo** area, tap **Start New Drawer Memo**. On tapping, the **Start of Day** area opens.

Please be advised that the look of the Start of Day area depends on your CHQ settings.

To complete the SOD process, you have to go through each tab displayed on the left:

a. On the Drawer Cash - Opening Count tab (A in the screenshot), in the Count (B) column of

the grid, enter the present number of bills or coins for each denomination. Tap **Next** at the bottomright (**C**).

If the **Previous Diff** column has a non-zero value, on tapping **Next**, you will be asked to create a cash movement record to handle that difference.

b. On the Safe Cash – Opening Count tab (if applicable), in the Opening Amount field,

••••• ?		9:41	AM				100%				
Cancel		Drawer Cash -	Opening Cou	int							
Start of Day	Left in Drawer	r (Previous Draw	er Memo)				\$1,000.00				
DRAWER CASH	Opening Amo	unt			в		\$ 1,000.00				
Opening Count					V		ount Previous Di				
SAFE CASH	Denomination	Prev Amount	Prev Count	Plan Count	Count	Amount	Previous Dif				
Opening Count	\$100 Bill	0.00	0	0	0	0.00	0.00				
COMPLETE	\$50 Bill	0.00	0	0	0	0.00	0.0				
Summary	\$20 Bill	200.00	10	10	10	200.00	0.0				
	\$10 Bill	200.00	20	20	20	200.00	0.0				
	\$5 Bill	200.00	40	40	40	200.00	0.00				
	\$1 Bill	200.00	200	200	200	200.00	0.00				
	\$1 Coin	0.00	0	0	0	0.00	0.00				
	50 Cents	0.00	0	0	0	0.00	0.00				
	Total	\$1,000.00				\$1,000.00	\$0.0				

enter the current amount in the safe. Tap Next.

c. In **Complete – Summary**, to automatically print the Memo on finalizing, turn the **Print Start of Day** switch on.

If the Notes field is required, tap Add Notes.

Then, to verify the counts, in the **Opening Verification** field, tap **Select** and then enter the credentials of a user with the appropriate security right.

3. Tap **Complete** to finish the SOD process and activate the Memo.



Drawer Memo – End of Day

The **End of Day** (EOD) process allows for counting cash both in the drawer and safe at the store closing. The EOD process must be completed to finalize an active Drawer Memo.

To begin the EOD process, in POS:

1. On **Home Screen**, tap **View** next to the Drawer Memo status on the right. On tapping, the active Drawer Memo opens.

2. In the **Drawer Memo** dialog, tap **End of Day** at the bottom-right. On tapping, the **End of Day** area displays.

To complete the EOD process, you have to go through each tab displayed on the left:

a. First, in **Payments** that opens automatically, you can review all types of payments made. Tap

Next at the bottom-right.

b. On the **Drawer Cash – Closing Count** tab, in the **Count** column of the grid, enter the present number of bills or coins for each denomination. Tap **Next**.

c. On the **Drawer Cash – Leave in Drawer Amount** tab (**A** in the screenshot), in the **Float** (**B**) column of the grid, enter the number of bills or coins for each denomination according to your denomination plan. Tap **Next** (**C**).

••••• 9:41 AM								
Close	Drawer	Cash - Leave in Dr	awer Amount					
End of Day	Denomination Pla	an				Busy Season		
PAYMENTS	Denomination Pla	in Amount				\$1,000.00		
 Cash (37) 	Leave in Drawer					¢1000.00		
 Credit Card (5) 	Leave in Drawer	Amount		В		\$ 1,000.00		
DRAWER CASH	Denomination	Plan Amount	Plan	Float	Float Amount	Difference		
Closing Co A	\$100 Bill	0.00	o	0	0.00	0.00		
	\$50 Bill	0.00	0	0	0.00	0.00		
 Leave in Drawer Amount 	\$20 Bill	200.00	10	10	200.00	0.00		
Cash Handling	\$10 Bill	0.00	0	24	240.00	0.00		
Summary	\$5 Bill	200.00	40	40	200.00	0.00		
SAFE CASH	\$1 Bill	200.00	200	200	200.00	0.00		
Closing Count	\$1 Coin	0.00	0	0	0.00	0.00		
Closing Count	50.0	0.00	^	~	0.00	0.00		
 Summary 	Total	\$1,000.00			\$1,000.00	\$0.00		

d. On the Drawer Cash – Cash

Handling tab, in the **Take Out** field, enter the amount to be taken out of the drawer. Then, tap the **Handle Balance as** field to define how the remaining cash should be handled. Tap **Next**.

e. On the Drawer Cash – Summary tab, tap Next.

f. On the **Safe Cash – Closing Count** tab (if applicable), in the **Counted Amount** field, enter the current amount in the safe. Then, in the **Leave in Safe Amount** field, define how much should be left in the safe for the next day.

g. On the Safe Cash – Summary tab (if applicable), tap Next.

e. In the **Finalize** tab, to print the Drawer Memo or Deposit Slip, turn on the **Print Drawer Memo** or **Print Deposit Slip** switch, respectively.

If the Notes field is required, tap Add Notes.

After that, if any deposit records were created against that Drawer Memo, in the **Deposit Confirmation** field, tap **Select**. In the dialog that opens, enter the credentials of a user with the appropriate security right.

3. Tap Finalize.



Options

Orientation to Sales Receipts

In the **Sales Receipts** area of POS, it is possible to create new and manage finalized Sales Receipts.

1. To open the **Sales Receipts** area, on the POS **Home Screen**, tap **Sales Receipts**. The **Sales Receipts** button is located either in the navigation panel at the bottom or in the **More** menu depending on your settings. On tapping, the **Sales Receipts** list view opens.

The list view includes two tabs:

- On Hold: contains held Sales Receipts
- History: contains finalized Sales Receipts

......

Close

2. To create a new Sales Receipt, tap New Sale (A in the screenshot) in the upper right corner.

3. To search for Sales Receipts, use the **Search** field at the top-left (**B** in the screenshot). To define by which field to search, tap **All** next to the search field.

Alternatively, to scan a Receipt, tap the **barcode** icon in the **Search** field.

	В	On Hold	(3)		History		
All Q	Search		[IIII] Filter				New Sal
Transaction #	Date / Time	Туре	Customer	Cashier	Payment	Total	Disposition
1234567890912	03/01/2020 09:14 AM	Sale	Ron Sparks	Jeff	Cash	\$999,132.76	
1234567890912	03/01/2020 09:14 AM	Sale	Michael Mauerer	Devan	Credit Card	\$999,999.99	
1234567890912	03/01/2020 09:14 AM	Sale	None	Sara	Cash	\$23.05	Reversal
1234567890912	03/01/2020 09:14 AM	Sale	None	Jeff	Cash	\$23.05	Reversed
1234567890912	03/01/2020 09:14 AM	Sale	Michael Mauerer	Devan	Credit Card	\$19.95	
No Items No		Sara	Mixed	С	Void/ Reverse	Reprint C	opy Return
1234567890912	03/01/2020 09:14 AM	Return	Ron Sparks	Jeff	Cash	\$999,132.76	
1234567890912	03/01/2020 09:14 AM	Sale	Michael Mauerer	Devan	Credit Card	\$19.95	
1234567890912	03/01/2020 09:14 AM	No Items	None	Sara	Mixed	\$23.05	
1234567890912	03/01/2020	Noltems	None	Sara	Mixed	\$23.05	
87 Receipt(s)		First	Prev Page: 1	of 2 Nex	t Last	Las	t 30 Days / Clou

9:41 AM Sales Receipts

 To void/reverse or reprint a finalized Receipt, in the

History tab, swipe left the required row and then select the required option (C in the screenshot).

5. To configure the default printing settings for Sales Receipts, tap **Options** (**D** in the screenshot) in the upper right corner and then **Printing Options**.

Also, to open your cash drawer, tap **Options** and then **Open Cash Drawer**.

6. To select the time span for which historical Sales Receipts will display, tap **Filter** next to the **Search** field.



Sales Receipt creation – Adding a customer and items to the sale

To create a Sales Receipt, first, you need to add a customer and sale items to it.

To do so, in POS:

- 1. On the Home Screen, tap New Sale.
- 2. In the Sales Receipt area that opens, tap the Customer tab at the top.

Under **Customer**, use the **Search** field at the top to find the required customer. Alternatively, to scan the customer's member code, tap **Scan with Camera** below the search field.

In the list of search results, tap the required row to add that customer to the sale.

••••• 후		9:41 AM			100%
Close			Hold	Discard	More
Info	Customer	Cart	0.10.0		George 2
			🔍 Item Se		(imi)
All Q			NJ CASHIE Nora J	R Ade	d Associate
	[IIII] Scan with Camera		Bags +	-	0 x \$0.20
	New Customer		Sub-Total		\$0.00
(Promo Disco	unts	\$0.00

Alternatively, tap **New Customer** below the search field to create a new account.

3. Tap the **Cart** tab at the top.

To scan an item and add it to the sale, tap the **barcode** icon next to the **Item Search** field in the right-side panel (**A** in the screenshot).

Alternatively, use the **Item Search** field to add items to the sale. If an exact match is found, the item is added immediately. If multiple matching results are found, tap the required row to add that item to the sale.

To edit an item that's been

4:46 PM Tue Nov 10 🗢 100% 🎫 Close Sales Receipt Cart (1) Custome Info Discard **RFID** Tag Status ITEM(S) Qty Price Disc A. Total Q Item Search (iiii) OM CASHIER LEEVE... Add Associate €175.. €175.00 Edit €175.00 Sell Items - 1 Disc Receipt/Coupon €0.00 Fees Receipt €0.00 TOTAL €175.00 Sort Empty Cart

added (for example, to add a discount or a fee), swipe the item row left and then tap **Edit** (**B** in the screenshot).

4. To add or change a cashier or associate on the sale, in the right-side panel under the **Search** field, tap **Cashier** or **Associate**, respectively.

5. Tap Pay (C in the screenshot) to proceed to the Payment area.

the Receipt, tap Print

6. To edit or remove a

Sales Receipt creation – Cash payment

This guide describes how to complete a sale if the customer is paying in cash.

To accept a cash payment on a Sales Receipt, in POS:

1. On the Home Screen, tap New Sale.

2. On the Sales Receipt that opens, add a customer and sale items. To learn how to do that, see Sales Receipt creation – Adding a customer and items to the sale.

3. Then, tap **Payment** in the bottom right corner. On tapping, the Payment dialog opens.

4. In **Payment**, tap **Cash** in the right-side panel. On tapping, the **Cash** dialog opens (see the screenshot on the right).

In the field below Amount Due, enter the amount the customer is paying and then tap Pay. On tapping, you are returned to the Payment dialog.

5. If any change is due, tap **Cash** again (which now displays with a blue

arrow (1). In the **Cash** dialog, enter the required amount and then tap **Give Change**. On tapping, you are returned to the **Payment** dialog.

payment or a change record, swipe that row left and then tap the required option (A in the screenshot). 7. To print the Sales Receipt on finalizing, select Print above the Finalize button (B in the screenshot). Additionally, to configure the default printing settings for

Options in the upper right corner (**C** in the screenshot).

8. Once the required amount of cash is captured, tap **Finalize** at the bottom-right.

86608 Ş	9:41 AM		
K Sale Discard	Payment (2)		C Print Options
Sale Total: 3 Item(s)	\$289.45	Fo.]	
Payments Taken	\$300.00	Cash	Credit Card
Change Given	- \$10.55		
A Edit	Remove	Gift Card	Offline Credit Card
Cash	- \$10.55		ľ.
		Credit Memo	Check
Change Due		Store Credit	Tokens
Change Due \$0.00	в	Email Print Print Printer1	Gift Receipt
		FINA	LIZE







Sales Receipt creation – Offline credit card payment

This guide describes how to complete a sale offline if the customer is paying with a credit card.

To accept an offline credit card payment on a Sales Receipt, in POS:

1. On the Home Screen, tap New Sale.

2. On the Sales Receipt that opens, add a customer and sale items. To learn how to do that, see Sales Receipt creation – Adding a customer and items to the sale.

3. Then, tap **Payment** in the bottom right corner. On tapping, the **Payment** dialog opens.

4. In **Payment**, tap **Offline Credit Card** in the right-side panel. On tapping, the **Offline Credit Card** dialog opens (see the screenshot on the right).

In the dialog, select the card type and enter the card's last four digits as well as the authorization code (if required). Then, tap **Done** in the upper right corner.



5. In the dialog that opens on tapping **Done**, enter the amount the customer is paying in the field below **Amount Due**. Then, tap **Pay**. On tapping, you are returned to the **Payment** dialog.

6. In **Payment**, to view or remove a payment record, swipe that row left and then tap the

required option (**A** in the screenshot).

7. To print the Sales Receipt on finalizing, select **Print** above the **Finalize** button (**B** in the screenshot).

Additionally, to configure the default printing settings for the Receipt, tap **Print Options** in the upper right corner (**C** in the screenshot).

8. Once the required

amount is captured, tap Finalize at the bottom-right.





Sales Receipt – Managing promotions

Promotions are automatically applied when items meeting the requirements are added to the Sales Receipt.

Once a promotion has been applied, in the **Cart** tab of the **Sales Receipt** area, the green "Promotions Applied – View Promos" message displays at the top:



1. To view the name and discount amount of each applied promotion, tap **View Promos** (1 in the screenshot above) in the message.

2. To see promotion details for a specific item or apply an additional discount on top of the promotion, tap **Promo (2** in the screenshot above) and then:

a. In Promos, under APPLIED PROMOTIONS

(A in the screenshot on the right), the list of all promotions applied to that item displays.

b. To apply an additional discount to the item, under **ADD DISCOUNT**, tap **ADD** (**B** in the screenshot) next to the required discount type.

c. Then, tap **Done** in the upper right corner of the area.

***** ÷		9:41 AM		
< Back		Done		
Location Company	Manual	Coupons	Change Price	Promos
8 31 View Availability	APPLIED PROMOTIONS	A	OFFER PRICE:	\$19.99
Discounts	Buy 3 get \$5.00 off a 4th		25.00%	- \$5.00
Return			After Promo: Additional Discount: New Price:	\$14.99 \$0.00 \$14.99
Ship	ADD DISCOUNT			
Fees	Friends and Family	15.00%	- \$3.00	(+ ADD)
Taxes Clearwater FL	Competitive	10.00%	- \$2.00	(+ ADD)
Custom				
Item Details	Display Item	25.00%	- \$5.00	(+ ADD)
	Damaged Item	None	None	(+ ADD)
	Open Box	15.00%	- \$3.00	(+ ADD)



Making an Open Return

An Open Return can occur when the customer returns merchandise without the original Sales Receipt.

To make an Open Return, in POS:

- 1. On the Home Screen, tap New Sale.
- 2. In the Sales Receipt area that opens, tap Cart (A in the screenshot below) at the top.

3. In the **Cart** tab, tap the **barcode** icon (**B** in the screenshot) in the right-side panel to scan the return item and add it to the cart. Alternatively, search for it manually via the **Item Search** field.



4. Once the item is added to the

cart, swipe the item row left and tap **Open Return** (**C** in the screenshot above). On tapping, the **Return** tab of the **[item name] – edit** dialog opens.

5. In the **Return** tab, do the following:

a. If no default return reason is defined, the Return Reason list displays automatically. In the

list, tap the required reason.

Once a return reason is defined, the **RETURN VALUES** and **ADDITIONAL INFORMATION** sections become available below.

b. To add a discount to the return item, in the **Discount Reason** field, tap **Select** (**1** in the screenshot on the right).

c. To add a fee to the return item, in the **Fee Type** field, tap **Select**.

- < Back 2 Classic Polo Shirt Done Location OPEN RETURN N/A N/A Return Reason Wrong Size View Ava Discounts RETURN VALUES Retu Open \$19.99 Ron Ship Select Fees Select \$1.79 Taxes Clearwater FL Clearwater FL TOTAL RETURN \$19.99 Custom ADDITIONAL INFORMATION Item Details 100 - Clearwater FL **ORIGINAL RECEIPT #** Select
- d. To indicate the original sale

location, date as well as the Sales Receipt number, under ADDITIONAL INFORMATION, define the Original Sale Location, Original Sale Date, and Original Receipt # fields respectively.

- e. Tap **Done** in the upper right corner of the area (**2** in the screenshot).
- 6. Back in the Sales Receipt area, tap Payment to go to the Payment area.



Sales Receipt – Applying a discount to multiple items

To apply the same discount to multiple sale items, in POS:

1. On the Home Screen, tap New Sale.

2. In the **Sales Receipt** area that opens, tap **Cart** at the top (**A** in the screenshot on the right).

3. In the **Cart** tab, tap the **barcode** icon (**B** in the screenshot) in the right-side panel to scan the required items and add them to the cart. Alternatively, search for them manually via the **Item Search** field.

Close			9:41 A/ Sales Re			100%
	Info Cus	stomer		Cart (5)	Hold Discard	d More
ITEM(S)		OFFER	DISCOUNT	TOTAL	Q Item Search	B 🗊
13	Mid-Rise Medium-Wash Super Skinny Ankle Jeans (W) Size 14 123456	\$59.99		\$59.99 >	NJ CASHIER Nora J.	Add Associate
	Crew-Neck Cardigan (W) Medium, Canary Yellow 123456	\$34,99		\$34.99 >	Bags + -	2 x \$0.2 \$173.9
6	Printed Crinkle-Crepe Ruffle-Waist Dress (Toddler Girls) 3T, Squash Floral 123456	\$21.99		\$21.99 >	Promo Discounts Sale Discounts Sale Fees Taxes	\$0.0 \$0.0 \$0.0 \$3.2
8	Short-Sleeve Shirt & Khaki Pants Set (Infant Boys) 12-18 M, Navy Dots / Khaki Pants 123456	\$29.99		\$29.99 >	TEACS	фU.2
	Printed Crinkle-Crepe Ruffle-Waist Dress (Girls)	\$29.99		\$26.99 >	TOTAL (5 Items)	\$177.59
Sort	MC Counter Floored	Many		Empty Cart	PAYME	NT

4. Once items are added to the cart, tap Edit Many at the bottom (C in the screenshot above).

In the Edit Many area that opens, do the following:

a. Tap to select the items that should be discounted.

b. Then, tap **Select** in the **REASON** field (**1** in the screenshot on the right) to choose a discount reason.

c. Optionally, to change the discount type ("Percentage" or "Amount"), tap the value in the TYPE field. Then, in the TYPE field (2 in the screenshot), enter the required discount percentage or amount, respectively.

d. Tap **Apply & Close (3** in the screenshot).

•••• 🕫	P			9:41 AM		100%
ance	ł			Edit Many		
ITEN	A(S)		OFFER	DISC	TOTAL	Discount
0	P	Mid-Rise Medium-Wash Super Skinny Ankle Jeans (W) Size 14 123456	\$59.99		\$59.99	REASON Military
•		Crew-Neck Cardigan (W) Medium, Canary Yellow 123456	\$34.99		\$34,99	Percentage 2 10.00
	A	Printed Crinkle-Crepe Ruffle-Waist Dress (Toddler Girls) 3T, Squash Floral 123456	\$21.99		\$21.99	
	8	Short-Sleeve Shirt & Khaki Pants Set (Infant Boys) 12-18 M, Navy Dots / Khaki Pants 123456	\$29.99		\$29.99	Apply
	A	Printed Crinkle-Crepe Ruffle-Waist Dress (Girls) XS, Squash Floral 123456	\$26.99		\$26.99	Apply & Close
¢ s	Sort			Select All	Deselect All	Remove Discount

Discounts Applied (2)

Once the discount is applied, in the **Sales Receipt** area, the green message appears at the top.