



MOBILE RELEASE GUIDE

Version 6.21

[Build 6.21.50](#)

[Build 6.21.90](#)

[Build 6.21.140](#)

[Build 6.21.210](#)

[Build 6.21.247](#)

[Build 6.21.283](#)

[Build 6.21.331](#)

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POS

New Sales Receipt area

TWD-29695, TWD-30543, TWD-32797

Build 6.21.50

In V6.21.50, we've added the Sales Receipt functionality to POS PRO.

NOTE:

New security rights have been added for the Sales Receipts area in POS. To learn more about new security rights, please refer to 6.21 CHQ Release Guide.

To open the **Sales Receipts** area, on POS **Home Screen**, tap **Sales Receipts** in the navigation panel at the bottom or in the **More** menu.

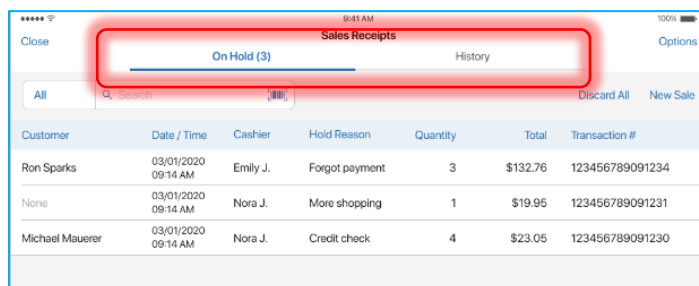
NOTE:

The location of the **Sales Receipts** button on POS **Home Screen** can be defined under **chq > settings > company settings > v6 App Designer > Point of Sale v6 > iPad > Home**.

In **layout**, the first four buttons display in the POS navigation panel at the bottom. The rest displays in the **More** menu.

Sales Receipts list view

On tapping **Sales Receipts** on **Home Screen**, the **Sales Receipts** list view opens. The list view consists of the following two tabs:



Customer	Date / Time	Cashier	Hold Reason	Quantity	Total	Transaction #
Ron Sparks	03/01/2020 09:14 AM	Emily J.	Forgot payment	3	\$132.76	123456789091234
None	03/01/2020 09:14 AM	Nora J.	More shopping	1	\$19.95	123456789091231
Michael Maurer	03/01/2020 09:14 AM	Nora J.	Credit check	4	\$23.05	123456789091230

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

On tapping **Options** in the upper right corner, the dialog with the following two options displays:

- **Open Cash Drawer:** opens the cash drawer
- **Printing Options:** opens the dialog to configure default printing settings for Sales Receipt documents

In the bar at the bottom, the following information displays:



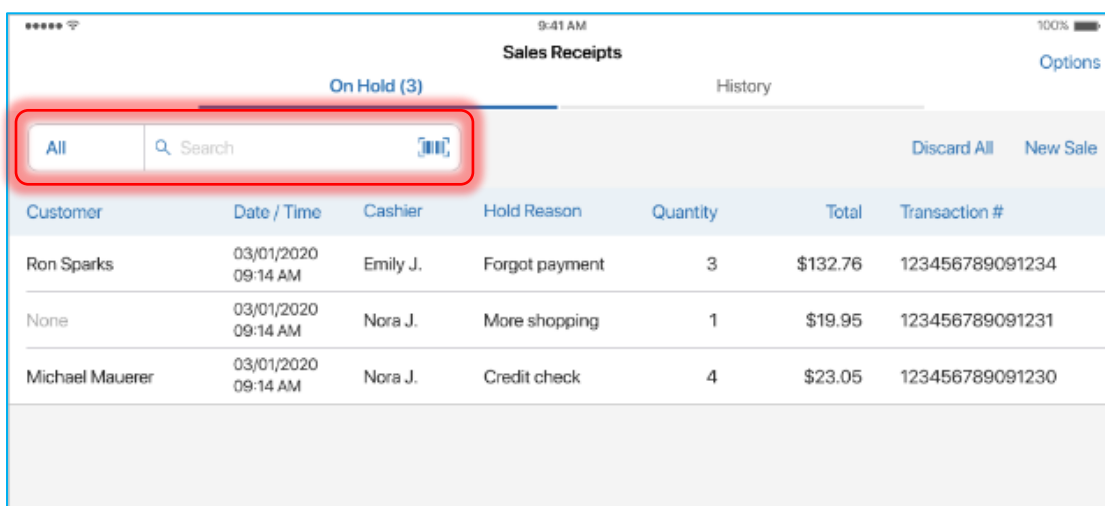
1 – the number of Receipts retrieved

2 – paging controls

3 – filter applied to the records (for example, “Last 30 Days”) and the source of the records (either “Cloud” or “Local”)

The On Hold tab

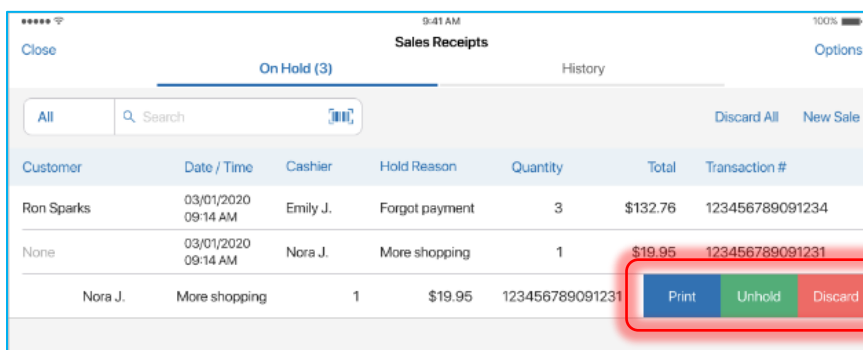
In the **On Hold** tab, to search for held Receipts, use the search field at the top:



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

To discard all held receipts for your location, tap **Discard All** in the upper right corner. Additionally, to create a new **Sales Receipt**, tap **New Sale**.

On swiping left a row with a Sales Receipt, the following options become available:

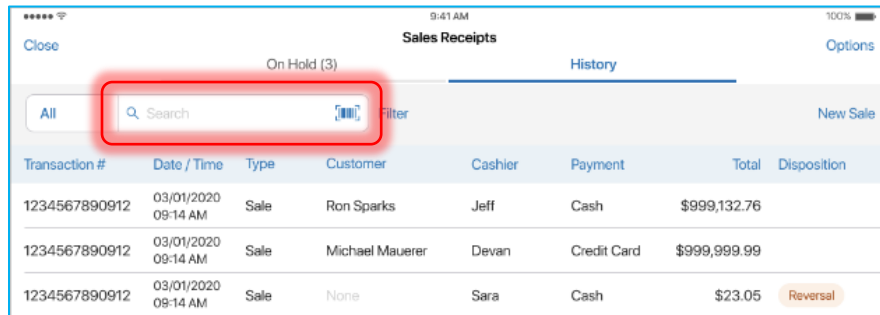


- **Print:** opens the printing dialog for that Receipt
- **Unhold:** opens the Receipt for editing

- **Discard:** discards the Sales Receipt

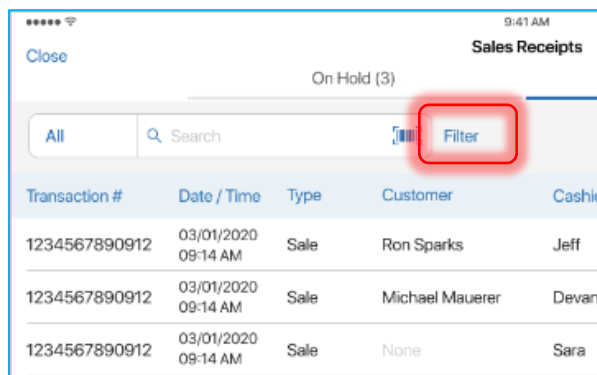
The History tab

In the **History** tab, to search for finalized Receipts, use the search field at the top:

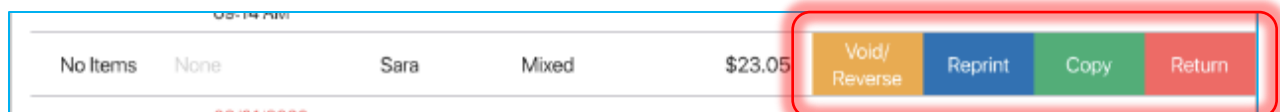


To define by which field to search, tap **All** next to the search field.

To select a time frame for the displayed Receipts, tap **Filter**:



On swiping left a row with a Receipt, the following options display:



- **Void/Reverse:** voids/reverses that Sales Receipt
- **Reprint:** opens the printing dialog for that Receipt
- **Copy:** creates an identical Sales Receipt
- **Return:** creates a new Sales Receipt with all sold items listed as return items

Creating a Sales Receipt

To create a new Sales Receipt, in the **Sales Receipts** list view, tap **New Sale** in the upper right corner. On tapping, the **Sales Receipt** dialog opens:

The screenshot shows the 'Sales Receipt' dialog with the 'Info' tab selected. The left panel displays details for the receipt, including the receipt number (1234567890123) and universal number (123456789). The right panel shows a summary of items (0 items, \$0.00) and a 'PAY' button.

The contents of the left part of the screen depend on the tab selected (**Info**, **Customer**, or **Cart**). On the contrary, the right-side panel remains available in every tab.

The right-side panel

At the top of the right-side panel, the following options may display according to your custom settings:

The screenshot shows the 'Sales Receipt' dialog with the 'Customer' tab selected. The right-side panel is highlighted with a red box, showing options: Verified Return, Send Sale, and More.

- **Verified Return**
- **Send Sale**
- **Service Items**
- **Edit Many**
- **Gift Card Purchase**
- **Gift Card Balance**
- **Hold**
- **Discard**

NOTE: Configuration in CHQ

It is possible to define what options display at the top of the right-side panel under **chq > settings > company settings > v6 App Designer > Point of Sale v6 > iPad > Home > Sales Receipt > Receipt Options**.

If three or less options are defined, all of them display in POS. If four or more options are defined, the first two display with the **More** button next to them. On tapping **More**, a menu displays with the rest of options.

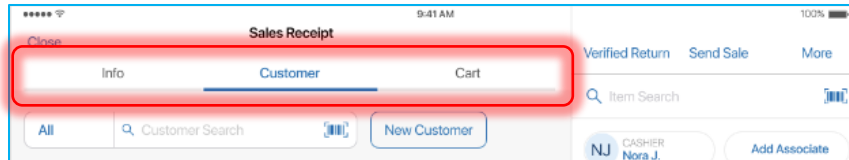
Also, under **Bags**, the following fields displaying sale totals are available:

Sub-Total (3)	\$120.00
Returns Sub-Total (2)	-\$80.00
Promo Discounts	\$0.00
Item Discounts	\$0.00
Item Fees	\$0.00
Sale Discounts	\$0.00
Sale Fees	\$0.00
Taxes	\$0.00

- **Sub-Total:** the subtotal of items sold minus any customer discount or member discount; the number in brackets indicates the total number of the non-return items
- **Returns Sub-Total:** the subtotal of return items; the number in brackets indicates the total number of the return items
- **Promo Discounts:** the total of promotion discounts applied to all sale items; tap the value in the field to see the list of all promotions applied
- **Item Discounts:** the total of discounts applied to all sale items
- **Item Fees:** the total of fees applied to the items
- **Sale Discounts:** the total of discounts applied at the sale level (global manual, coupon, customer, and membership discounts)
- **Sale Fees:** the total of all global fees added
- **Taxes:** the total of taxes applied
- **Total:** the Receipt total; the number in brackets indicates the number of items sold

The left side of the area

In the left part of the dialog, it is possible to switch between the following tabs:



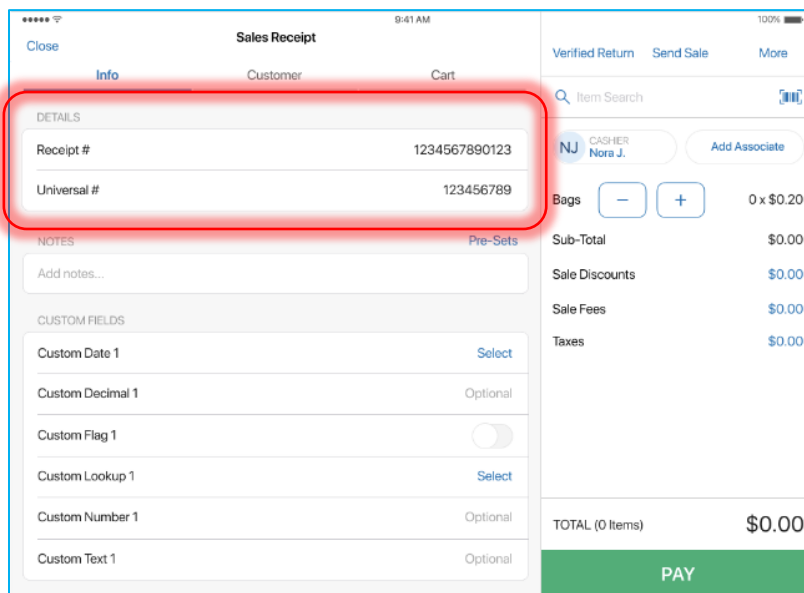
- **Info**
- **Customer**
- **Cart**

NOTE:

The order in which the **Info**, **Customer**, and **Cart** tabs display at the top can be configured in CHQ under **settings > company settings > v6 App Designer > Point of Sale v6 > iPad > Sales Receipt > Receipt Tabs**.

The Info tab

In the **Info** tab, under **Details**, the following fields display:



- **Transaction #:** the number of the Sales Receipt
- **Universal #:** the universal number of the Receipt

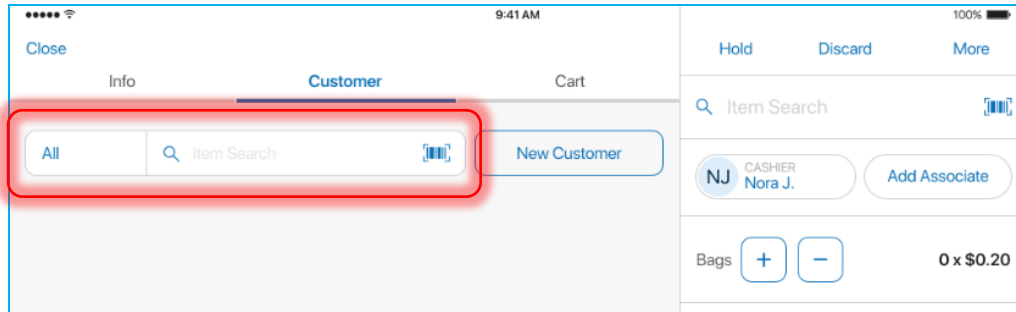
Below, the **Notes** field is available. Tap the field to manually enter a text or tap **Pre-Sets** to choose a pre-set text.

Under **Notes**, the **Custom Fields** display.

The Customer tab

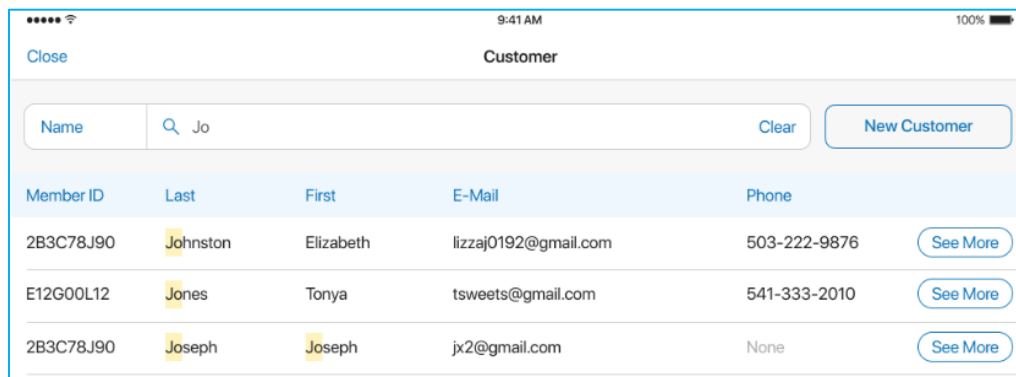
In the **Customer** tab, it is possible to add a customer to the sale.

To find a customer, use the search field at the top:



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

After searching, the list of results displays:



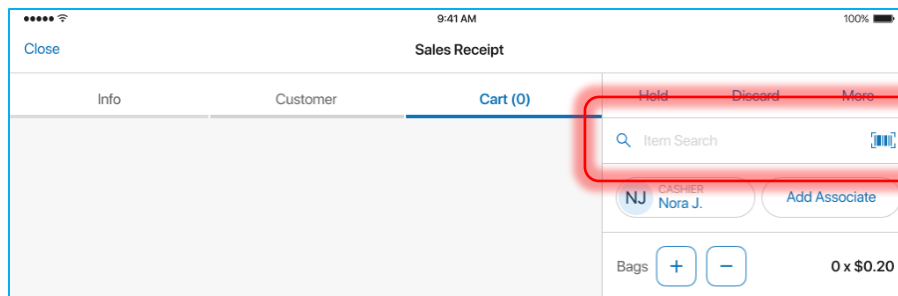
To add a customer to the Sales Receipt, tap the required row.

Alternatively, tap the **barcode** icon in the search field to scan the customer's member code or other information. Or, to add a new customer, tap **New Customer** next to the search field.

The Cart tab

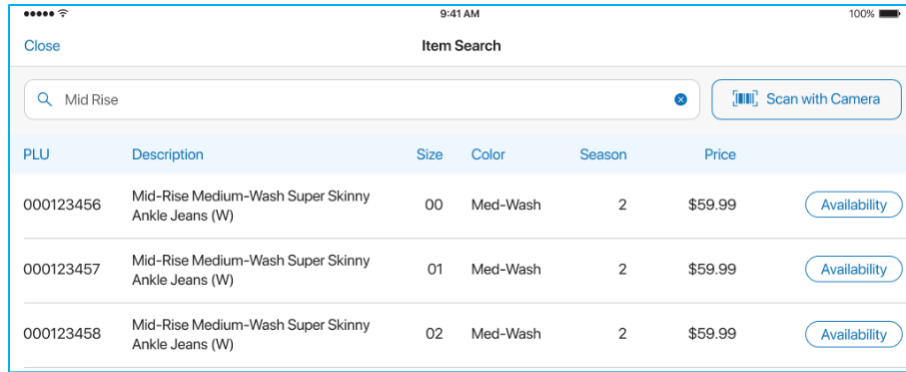
In the **Cart** tab, it is possible to manage items on the **Sales Receipt**.

On opening, the **Cart** tab is empty. Use the **Item Search** field in the right-side panel to add items:



If an exact match is found, the item will be added to the cart immediately.

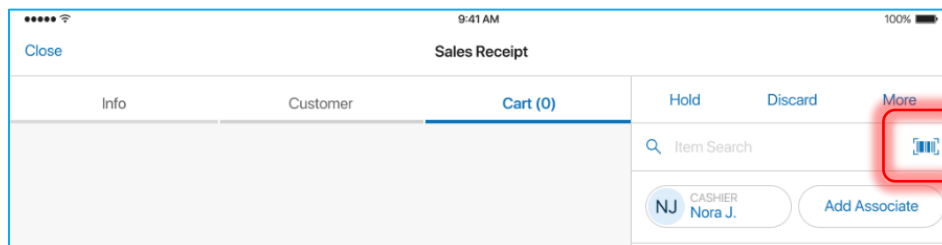
If not, the list of search results opens:



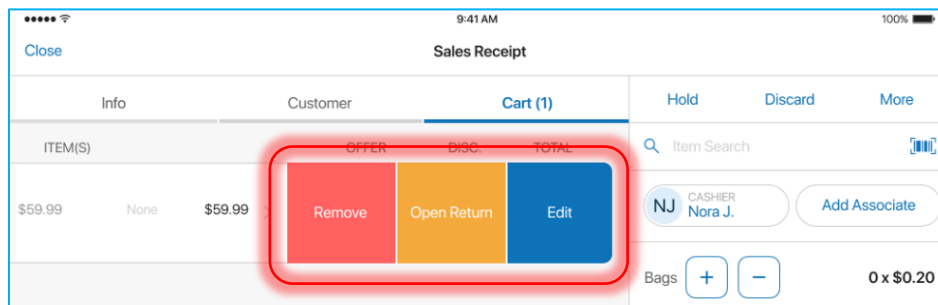
Tapping **Availability** in a row opens the **Availability** grid for that item.

Tapping anywhere else in the row adds that item to the cart.

Alternatively, to scan an item, tap the **barcode** icon in the **Item Search** field:

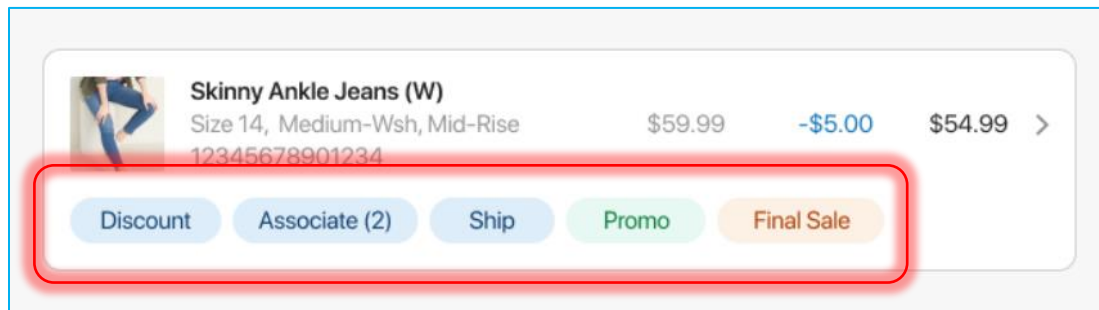


When an item is added to the cart, on swiping left, the following options display:



- **Edit:** opens the item dialog for editing
- **Open Return:** opens the item edit dialog to mark the item as an open return (a return without referencing the original Sales Receipt)
- **Remove:** removes the item from the cart

If a cart item has been edited, the corresponding tags display under its description:



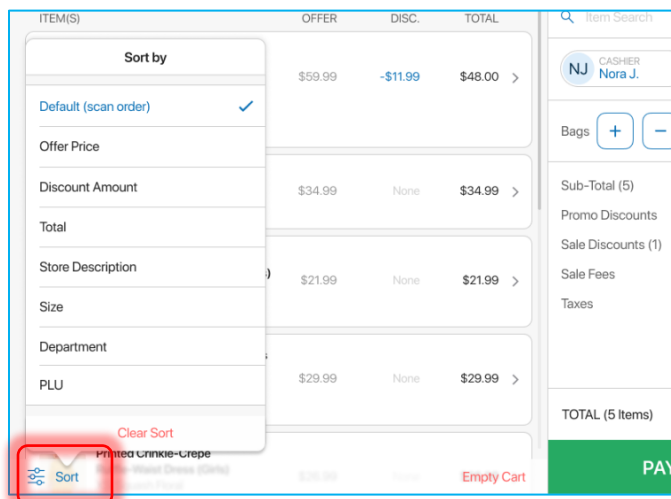
The following tags may be applied to an item:

- **Final Sale:** the item is a part of the final sale and cannot be returned
- **Discount:** a discount has been applied to that item
- **Promo:** a promotion has been applied to that item
- **Fee:** a fee has been applied to that item
- **Ship:** a ship-to address is defined for that item
- **Associate:** the associate the item has been applied to
- **Tax Exempt:** the item is tax-exempt
- **Service Item:** the item belongs to service items
- **Serial #:** the serial number has been entered for that item

Tapping such a tag opens the corresponding section of the item edit dialog.

Sorting items in the Cart tab

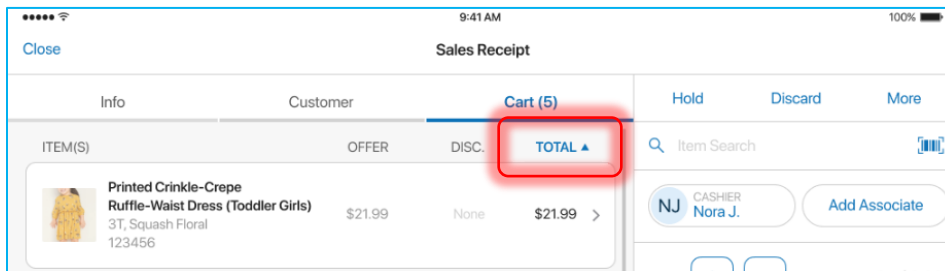
To choose how the items in the cart should be sorted, tap **Sort** in the bottom left corner:



In the dialog that opens, select by which item field to sort or tap **Clear Sort** at the bottom to return to the default sort.

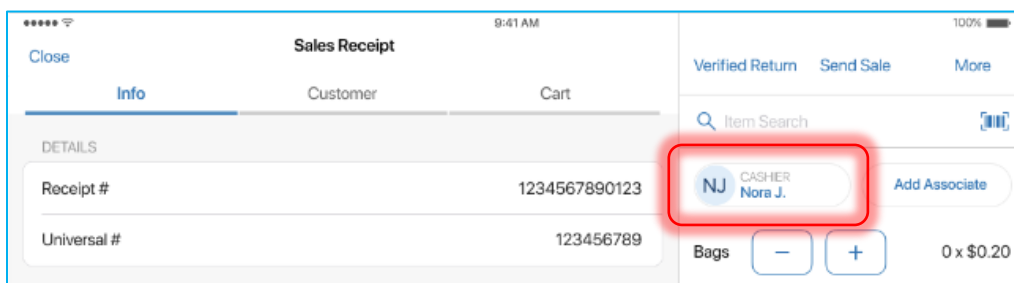
By default, the items are sorted in the ascending order.

To change it to the descending order, tap the label of the column by which the items are sorted:



Adding a cashier to the Sales Receipt

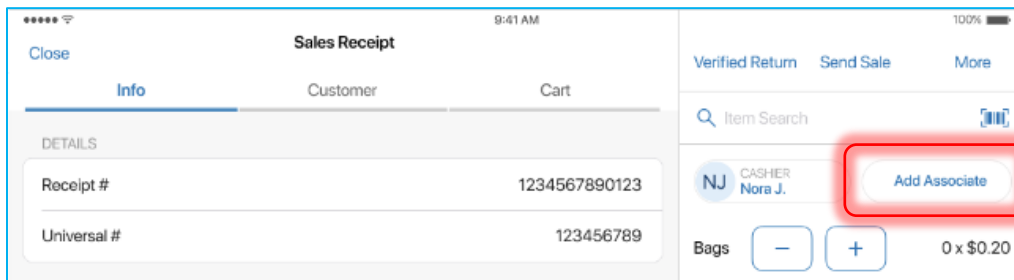
To add or change the cashier on the Sales Receipt, in the right-side panel, tap the **Cashier** option:



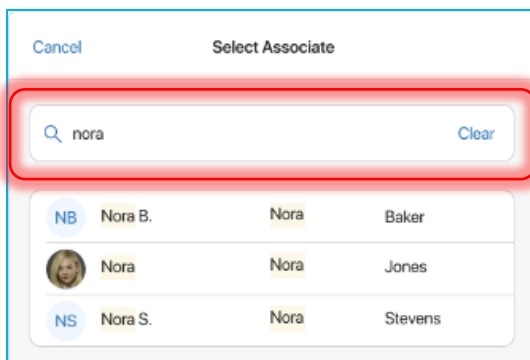
In the dialog that opens, select the required cashier and then enter the password.

Adding an associate to the Sales Receipt

To add or change the associate on the **Receipt**, tap the **Associate** option:



In the dialog that opens, use the **Search** field to find the required employee:

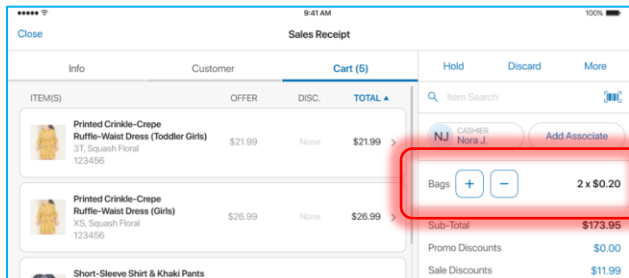


Search can be performed by **Nick Name**, **First Name**, or **Last Name**.

Once found, tap the required row to assign the associate to the Sales Receipt.

Adding bags to the Sales Receipt

Adding bags is possible in the **Bags** field of the right-side panel:



To add or remove a bag, tap **+** or **-** respectively.

NOTE: Configuration in CHQ

For the **Bags** option to be available in POS, the **shopping bag quick add** field must be defined under **chq > settings > location settings > locations / location settings > (your location) > sales**. Next to the **shopping bag quick add** field, tap **select** to define an item as a bag.

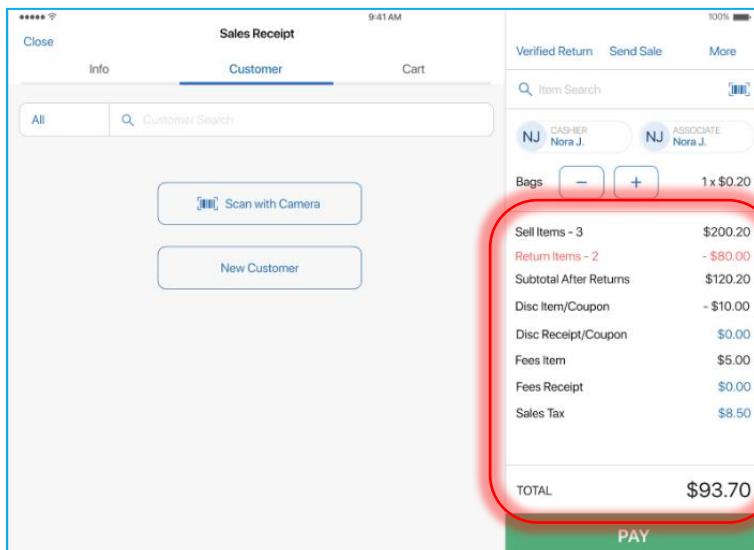
Once finished editing the Sales Receipt, tap **Payment** in the bottom right corner to proceed to the **Payment** dialog.

Updated Sales Receipt totals

TWD-37675

Build 6.21.331

In 6.21.331, we've updated how the totals display in the **Sales Receipt** area:



The following changes have been made:

- the **Sub-Total** field has been renamed to **Sell Items**
- the **Returns Sub-Total** field has been renamed to **Return Items**
- a new **Subtotal After Returns** field has been added; the value is calculated as **Sell Items** minus **Return Items**
- the **Item Discounts** field has been renamed to **Disc Item/Coupon**
- the **Promo Discounts** field has been renamed to **Disc Promo**
- the **Sale Discounts** field has been renamed to **Disc Receipt/Coupon**
- the **Item Fees** field has been renamed to **Fees Item**
- the **Sale Fees** field has been renamed to **Fees Receipt**
- the **Taxes** field has been renamed to **Sales Tax**
- a new **Rounded** field has been added below the **TOTAL** field; displays the amount the total was rounded to

NOTE: Configuration in CHQ

The rounding of the Sales Receipt total can be configured under **chq > settings > sales > sales documents > rounding workflow**.

Also, rounding for a certain currency can be configured under **chq > settings > company settings > currencies > denominations > amount rounding denomination**.

- a new **VAT Included** field has been added; displays the VAT tax amount applied

Sales Receipt: Updated scanning of the customer's data

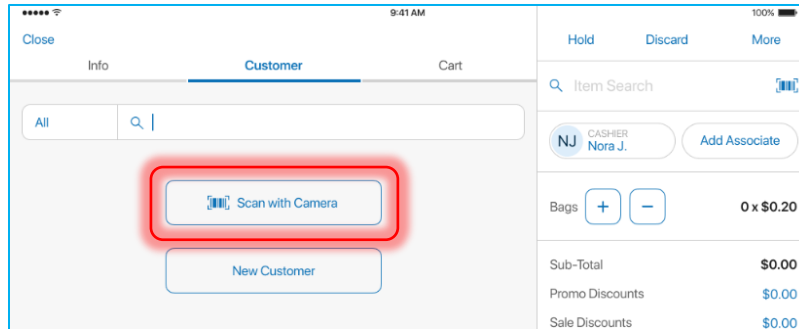
TWD-34772

Build 6.21.50

Prior to 6.21.50, when adding a customer to a new Sales Receipt via scanning, only the customer's member code could be recognized.

Starting from this version, it is now possible to scan the customer's **Name, Phone, Email**, or **Member Code** to find and add their account to the Sales Receipt.

Also, in the **Customer** tab of the Sales Receipt in POS, the **Scan with Camera** button is now located below the search field:



Editing items on a Sales Receipt

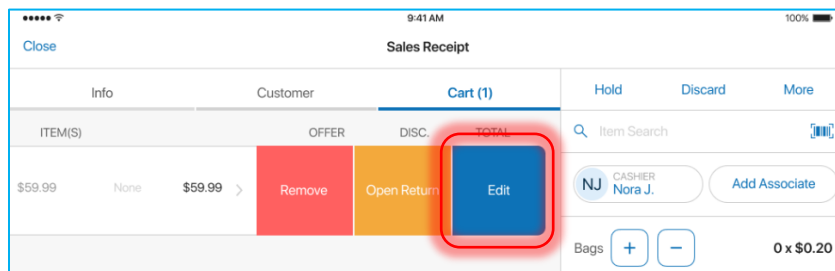
TWD-30484

Build 6.21.90

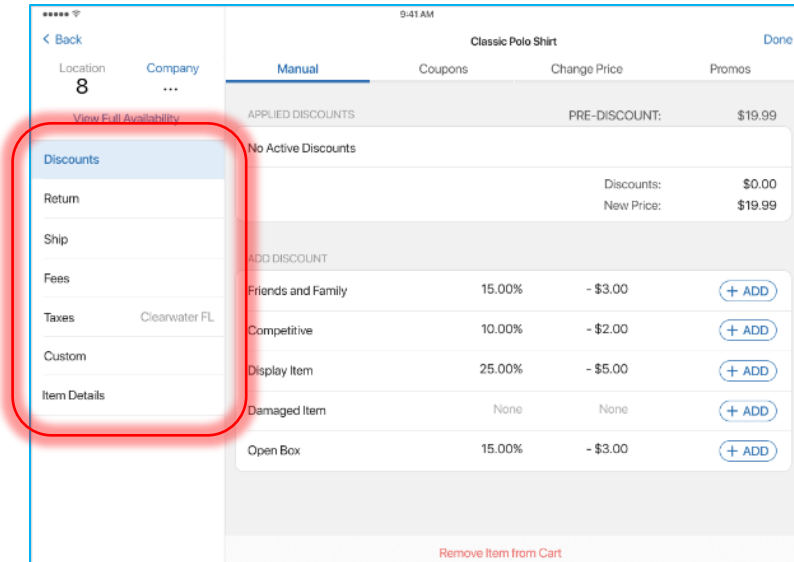
We've added the capability to edit items on a Sales Receipt. In particular, it is now possible to edit Item details, add discounts or fees, and perform open returns.

To edit an item on a Sales Receipt in POS, do the following:

1. On **Home Screen**, tap **New Sale**. On tapping, the **Sales Receipt** area opens.
2. In the **Sales Receipt** area, add items to the sale.
3. Once your items are added, they become available for editing. In the **Cart** tab, swipe left the row with the required item and then tap **Edit**:

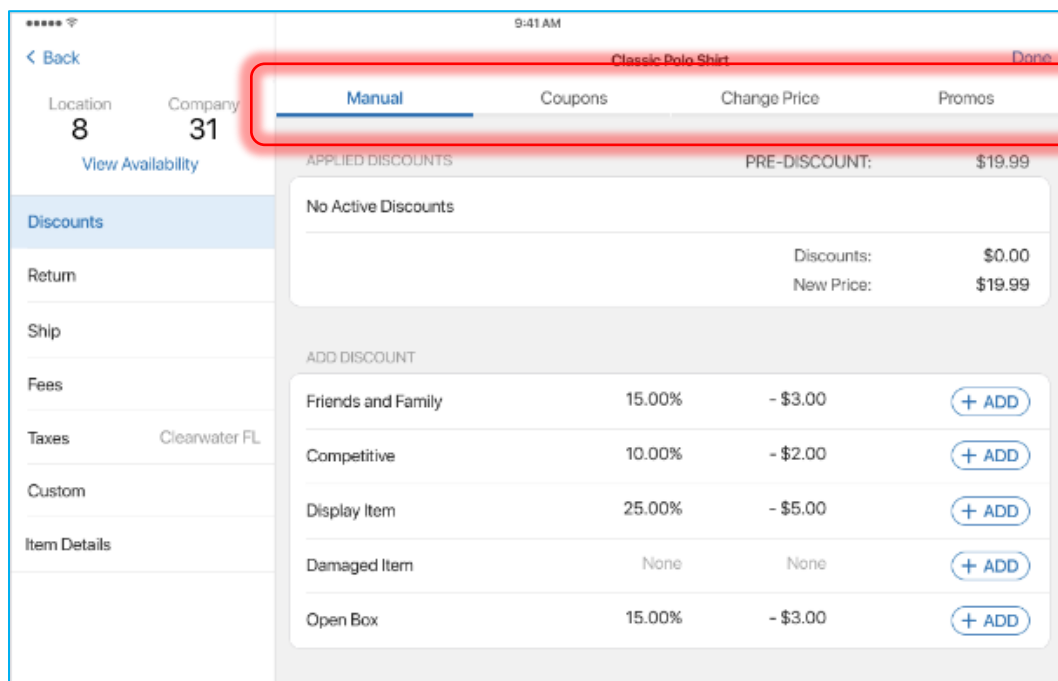


On tapping, that item's edit dialog opens. On the left, the list of available tabs displays:



The Discounts tab

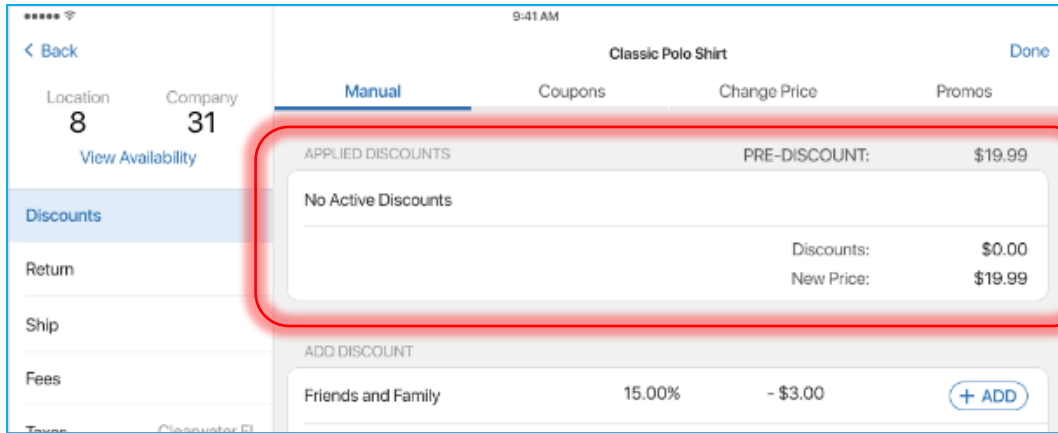
In **Discounts**, the tabs at the top correspond with the discount types available for application:



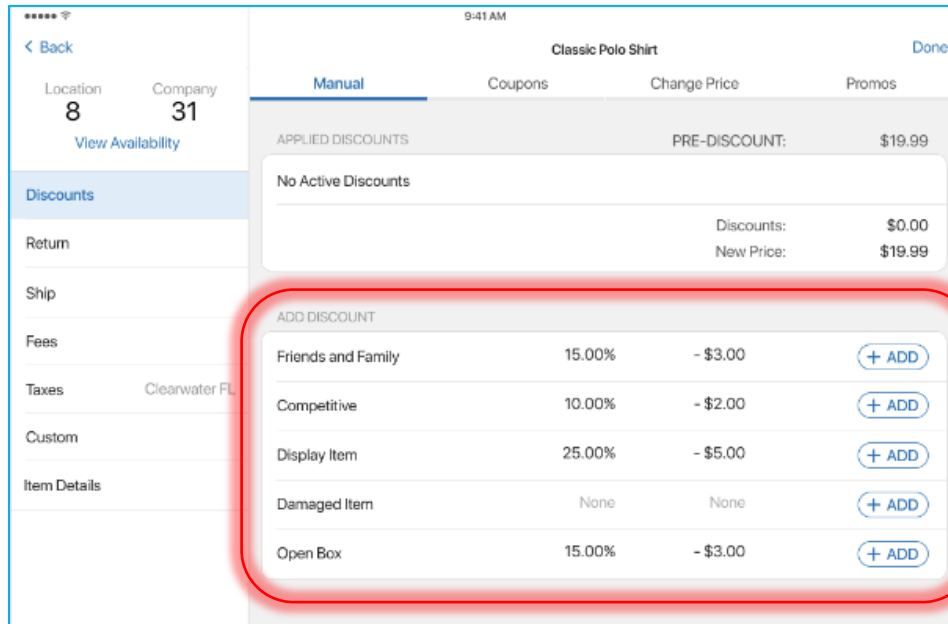
Discounts – Manual

To apply a manual discount to the item, tap the **Manual** tab at the top.

In **Manual**, under **Applied Discounts**, the information on the discounts already applied to the item displays:



Below, the list of available discounts displays:



NOTE: Configuration in CHQ

Configuring the list of available discounts in POS is possible under **chq > settings > sales > discount reasons**.

For each discount, the following information displays in the list:

- the name / reason for the discount
- discount percentage
- discount amount

To apply the discount to the item, tap **Add**.

If there is a default amount or percentage defined for the discount, the discount is applied at once. If not, the discount edit dialog displays:

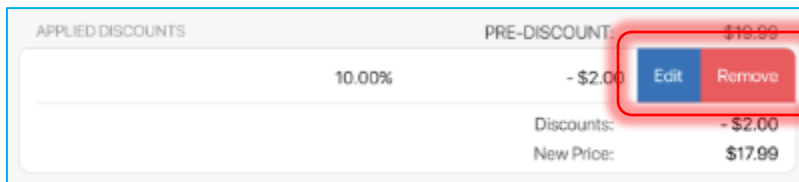
Cancel	Competative	Done
Pre-Discount Price		\$19.99
Percentage		10.00%
Amount		\$2.00
New Price		\$17.99
Authorization		Required

In the dialog, the following fields display:

- **Pre-Discount Price:** the item offer price before applying the discount
- **Percentage:** discount percentage; editable
- **Amount:** discount amount; editable
- **New Price:** the item price after applying the discount
- **Authorization:** the authorization code

Tapping **Done** in the upper right corner applies the discount to the item.

Once applied, the discount displays under **Applied Discounts**. To edit or remove the discount, swipe the discount row left and then tap the required option:



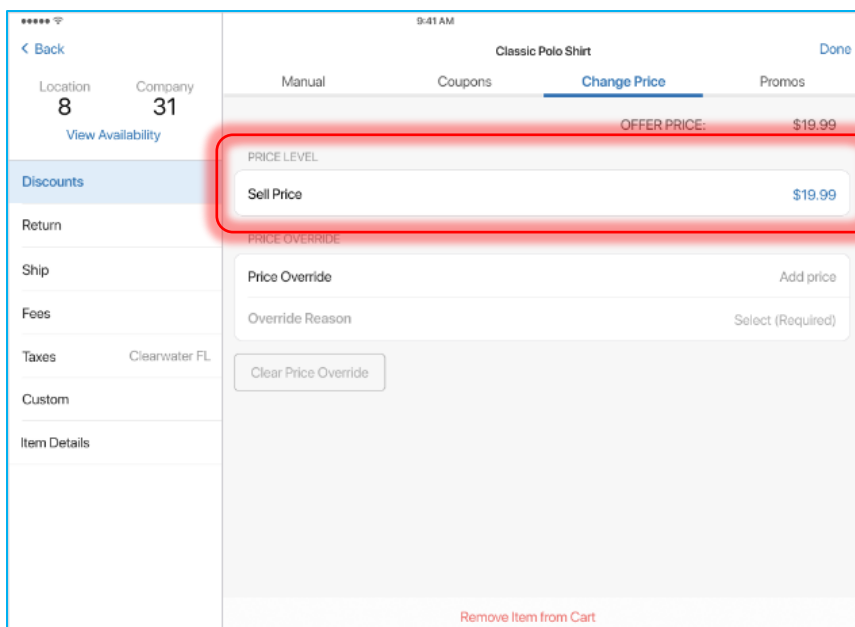
Once finished, tap **Done** in the upper right corner.

Discounts – Change Price

In the **Change Price** tab, it is possible to do the following:

- change the item price level
- manually override the item price

To change the item price level, tap the row under **Price Level**:



In the dialog that displays, select the required price level.

To manually override the item price, in the **Price Override** field, enter the item's new price:

The screenshot shows the 'Change Price' tab for a 'Classic Polo Shirt'. The 'OFFER PRICE' is \$19.99. The 'PRICE LEVEL' section shows 'Sell Price' at \$19.99. The 'PRICE OVERRIDE' section has a 'Price Override' field highlighted with a red box, with an 'Add price' button next to it. Below it is an 'Override Reason' field with a 'Select (Required)' dropdown and a 'Clear Price Override' button.

Then, in the **Override Reason** field below, tap **Select** to choose a reason for the price override. The override amount becomes the item's new offer price.

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

The Return tab

To learn more about **Open Returns** available in 6.21.90, see [Sales Receipt: Open Return](#).

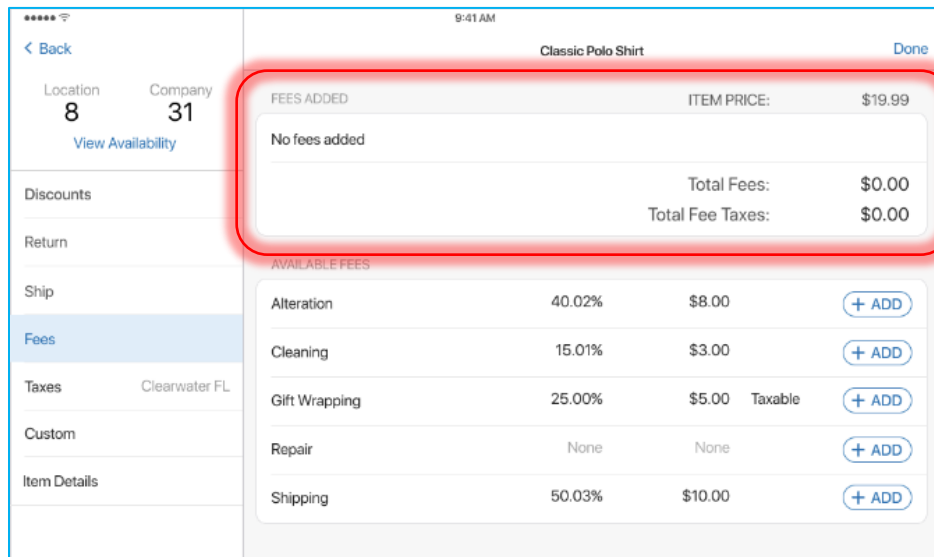
The Fees tab

To apply a fee to the item, in the left-side panel, tap **Fees**:

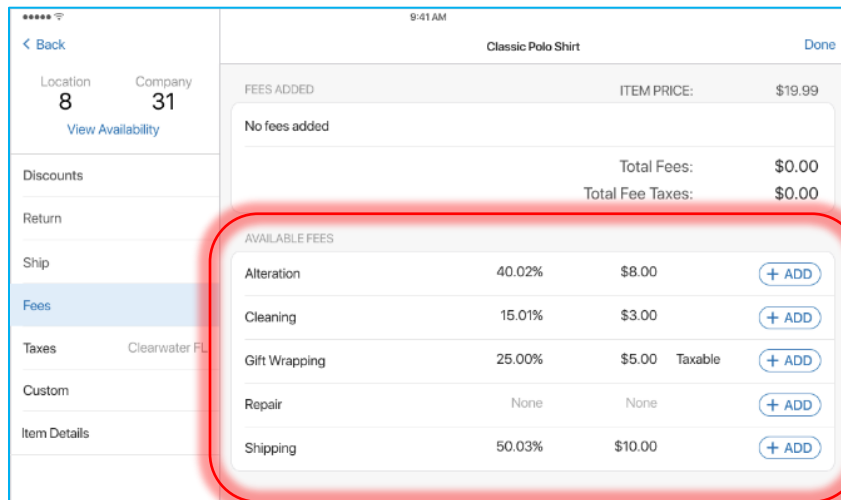
The screenshot shows the 'Fees' tab for a 'Classic Polo Shirt'. The 'ITEM PRICE' is \$19.99. The 'FEES ADDED' section shows 'No fees added' and 'Total Fees: \$0.00' and 'Total Fee Taxes: \$0.00'. The 'AVAILABLE FEES' section lists several fees with their percentages and amounts, each with a '+ ADD' button:

Fee Name	Percentage	Amount	Other Info	Action
Alteration	40.02%	\$8.00		+ ADD
Cleaning	15.01%	\$3.00		+ ADD
Gift Wrapping	25.00%	\$5.00	Taxable	+ ADD
Repair	None	None		+ ADD
Shipping	50.03%	\$10.00		+ ADD

In **Fees**, under **Fees Added**, the information on the fees already applied to the item displays:



Below, the list of available fees displays:



NOTE: Configuration in CHQ

Configuring the list of available fees in POS is possible under **chq > settings > sales > fees**.

For each fee, the following information displays in the list:

- fee name
- percentage of the item price the fee constitutes
- fee amount
- the tax amount (if the fee is taxable)

To apply the fee to the item, tap **Add** to the right of the respective fee name.

If there is a default amount or percentage defined for the fee, the fee is applied at once. If not, the fee edit dialog displays:

Field	Value
Quantity	1
Item Price	\$19.99
Percentage	40.02%
Fee Amount	\$8.00
Tax	\$0.00

Add notes here

Remove Fee

In the dialog, the following fields display:

- **Quantity:** the quantity of fees applied
- **Item Price:** the current item price
- **Percentage:** percentage of the item price the fee constitutes
- **Fee Amount:** the amount of the fee
- **Tax:** the tax amount

Tapping **Done** in the upper right corner applies the fee to the item.

Once applied, the fee displays under **Fees Added**. To edit or remove the fee, swipe the fee row left and then tap the required option:

FEES ADDED	ITEM PRICE	Tax
40.02%	\$19.99	\$1.40

Total Fees: \$8.00
Total Fee Taxes: \$1.40

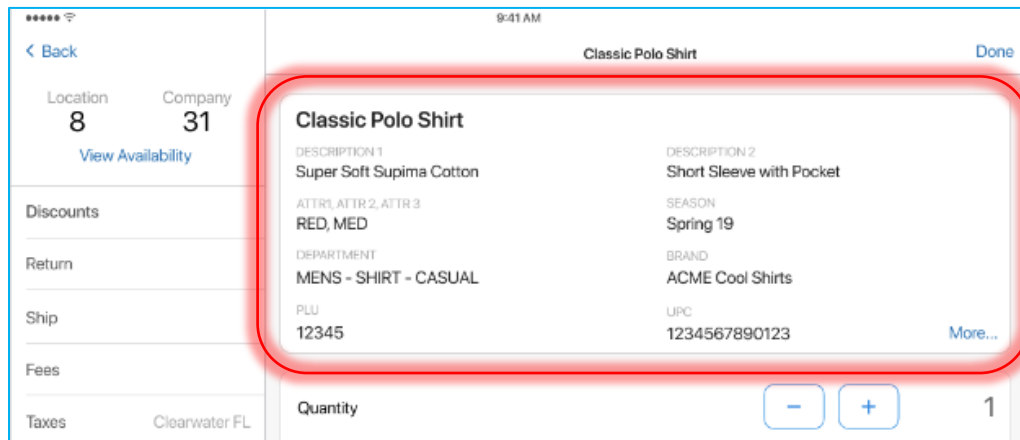
Remove All Fees

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

The Item Details tab

The **Item Details** tab contains information about the item on the Sales Receipt.

At the top, the catalog information about the item displays:



Below, the following fields are available:

- **Quantity:** the item quantity on the Sales Receipt; tap + or - to increment or reduce the item quantity by one, respectively
- **Associate:** the associate the item is assigned to; tap the value in the field to define the associate
- **EPC:** the Electronic Product Code if the item was added via the RFID scanning
- **Notes:** user-defined notes

In the **Price Breakdown** section, the information displays on every factor that affected the item price on the Sales Receipt.

If any changes were made in **Item Details**, tap **Done** in the upper right corner to save them.

Applying global discounts and fees to a Sales Receipt

TWD-30855

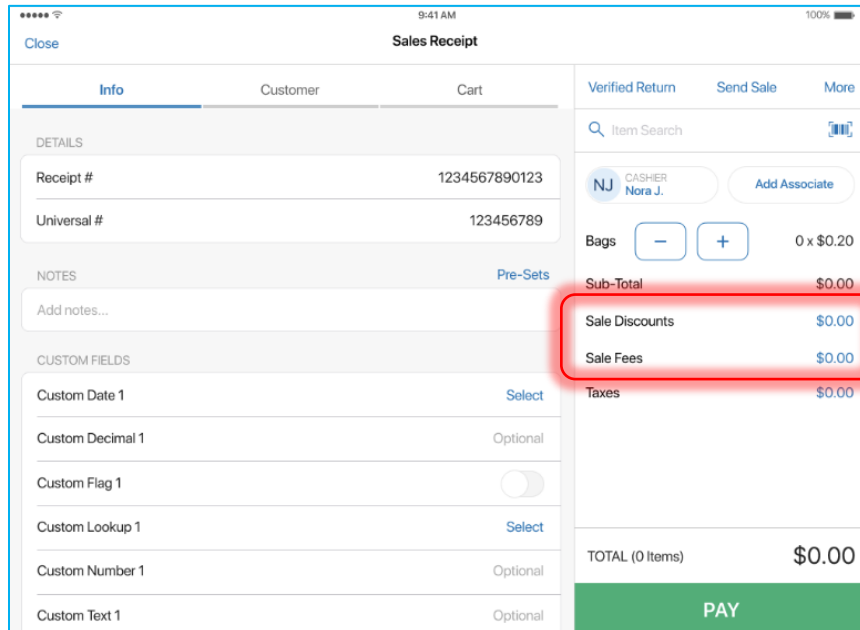
Build 6.21.90

Starting from 6.21.90, we've added the capability to apply global discounts and fees to a Sales Receipt.

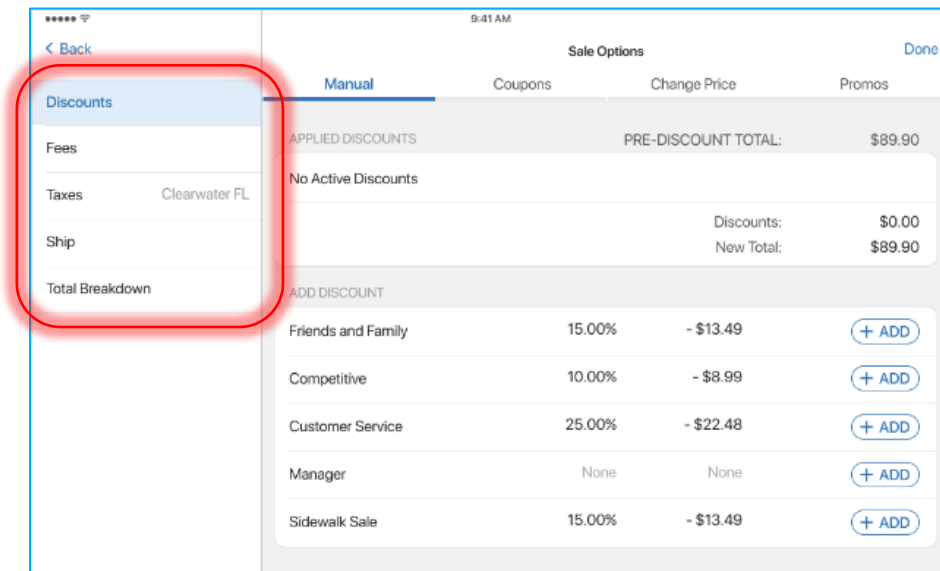
To add a global discount or fee to a Sales Receipt in POS, do the following:

1. On **Home Screen**, tap **New Sale**. On tapping, the **Sales Receipt** area opens.
2. In the **Sales Receipt** area, add items to the sale.

3. To add a global discount or fee to the Receipt, when in the **Sales Receipt** area, tap respectively the **Sale Discounts** or **Sale Fees** value in the right-side panel:



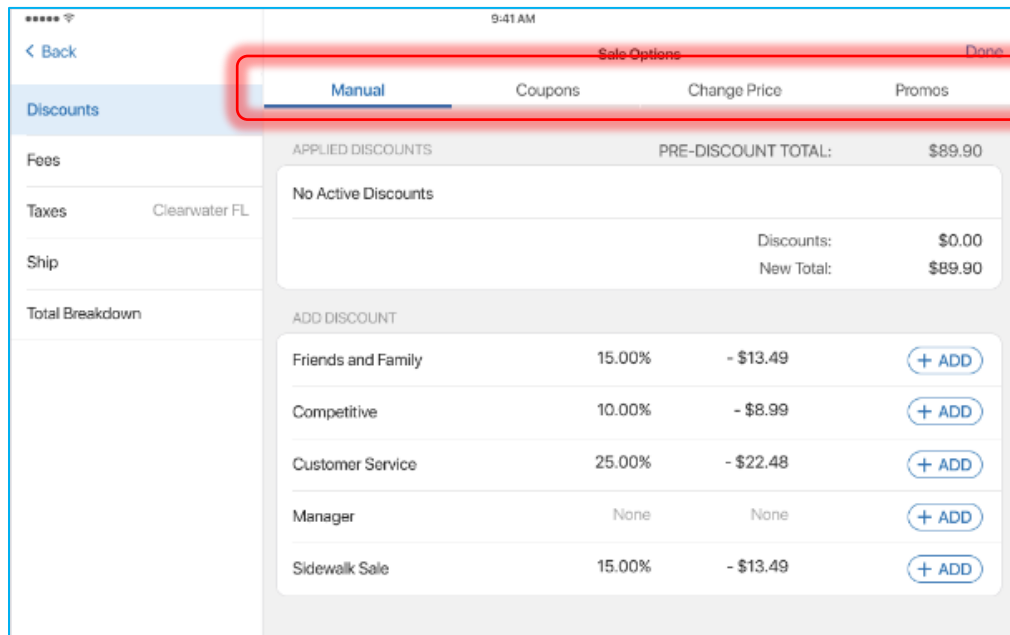
On tapping, the **Sale Options** area displays. In the dialog, the list of available tabs is located on the left:



Adding a global discount to the Sales Receipt

To add a global discount to the Sales Receipt, tap **Discounts** in the list of tabs on the left.

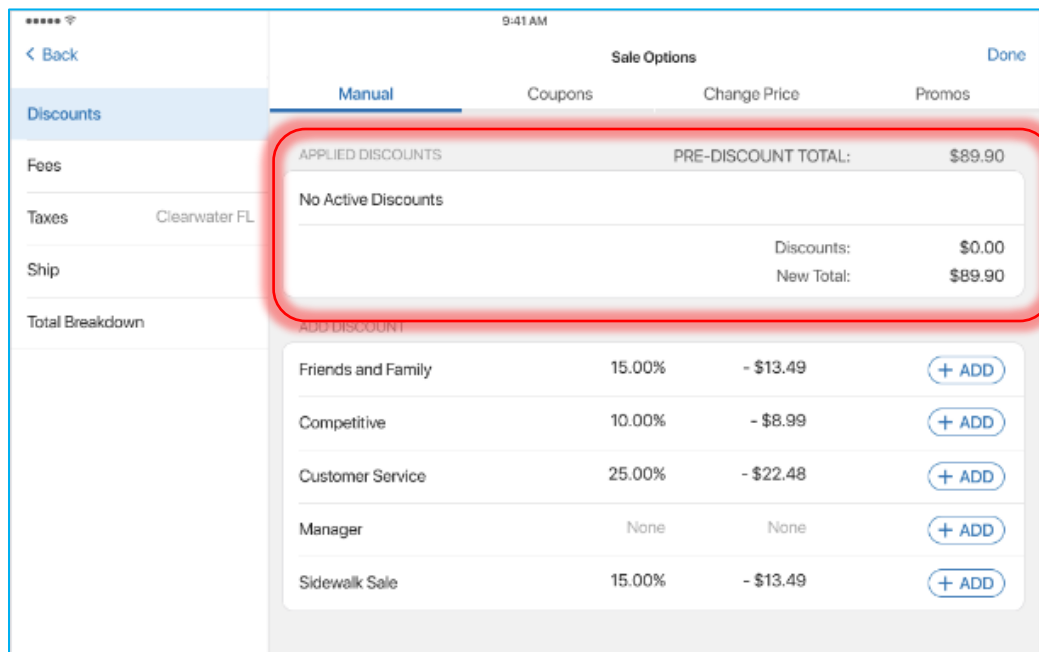
In **Discounts**, the tabs at the top correspond with the discount types available for application:



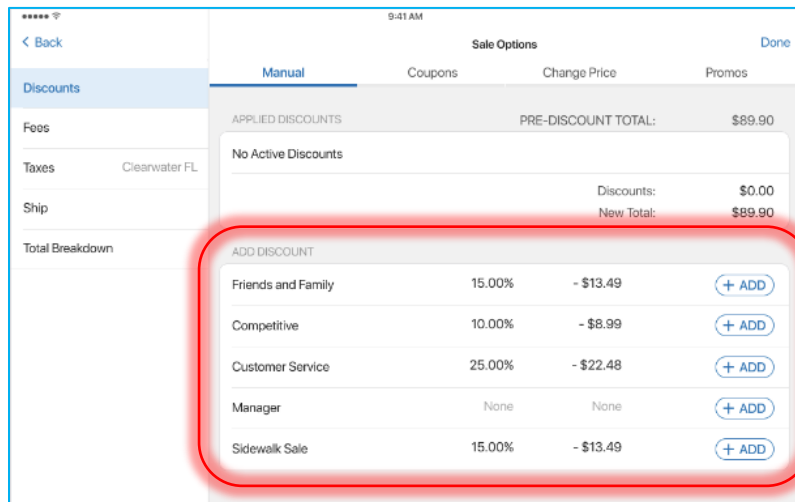
Discounts – Manual

To apply a manual discount, tap the **Manual** tab at the top.

In **Manual**, under **Applied Discounts**, the information displays on the discounts already applied to the Sales Receipt:



Below, the list of available discounts displays:



NOTE: Configuration in CHQ

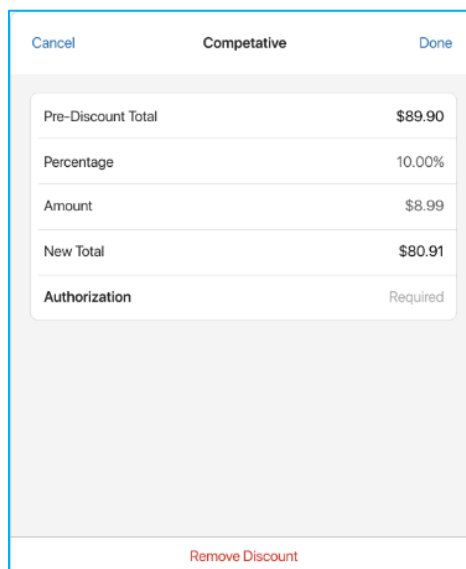
Configuring the list of available discounts in POS is possible under **chq > settings > sales > discount reasons**.

For each discount, the following information displays in the list:

- the name / reason for the discount
- discount percentage
- total discount amount

To apply the discount, tap **Add** to the right of the discount name.

If there is a default amount or percentage defined for the discount, the discount is applied at once. If not, the discount edit dialog displays:

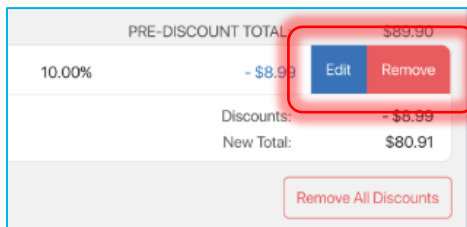


In the dialog, the following fields display:

- **Pre-Discount Total:** the Receipt total before any discount is applied
- **Percentage:** discount percentage; editable
- **Amount:** discount amount; editable
- **New Total:** the Receipt total after the discount is applied
- **Authorization:** the authorization code

Tapping **Done** in the upper right corner applies the discount.

Once applied, the discount displays under **Applied Discounts**. To edit or remove the discount, swipe the discount row left and then tap the required option:

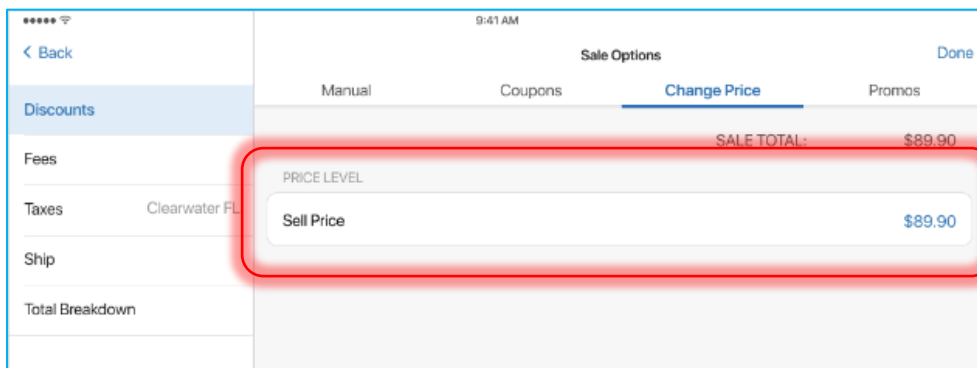


Once finished, tap **Done** in the upper right corner.

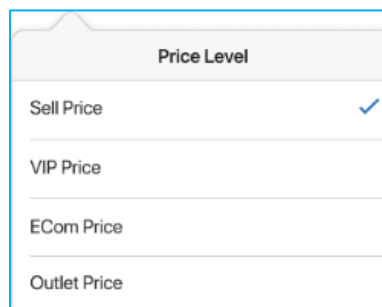
Discounts – Change Price

In the **Change Price** tab, it is possible to change the price level for all items on the Sales Receipt.

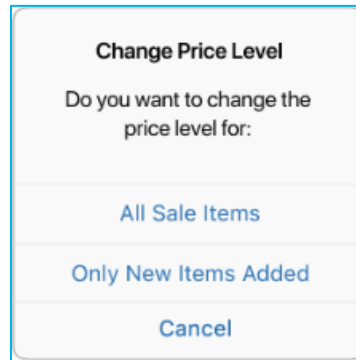
To do so, tap the row under **Price Level**:



In the **Price Level** dialog that displays, tap the required option:



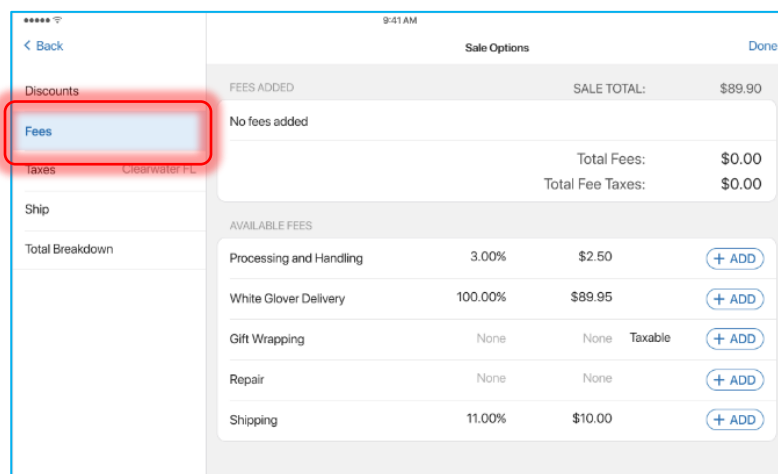
If there are items on the Sales Receipt and a new price level was selected, the **Change Price Level** dialog displays:



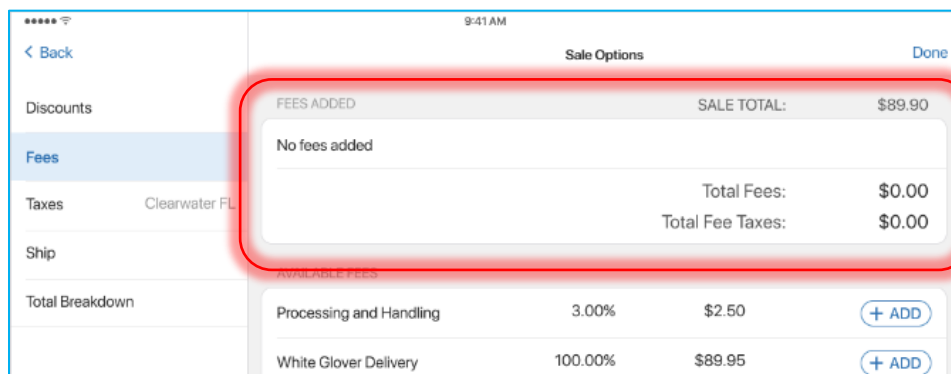
Tap the required option and then, once in the **Sale Options** area again, tap **Done** in the upper right corner to save changes.

Adding a fee to the Sales Receipt

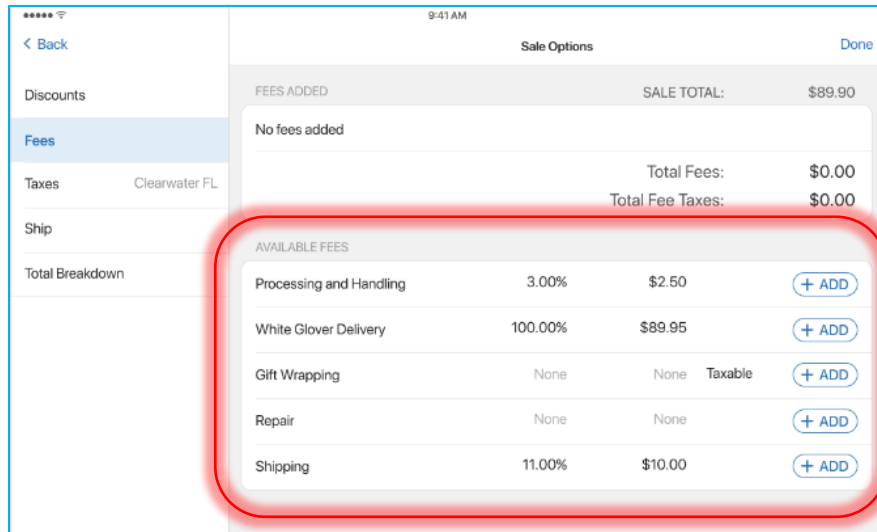
To apply a fee to the Sales Receipt, in the left-side panel, tap **Fees**:



In **Fees**, under **Fees Added**, the information on the fees already applied to the Receipt displays:



Below, the list of available fees displays:



NOTE: Configuration in CHQ

Configuring the list of available fees in POS is possible under **chq > settings > sales > fees**.

For each fee, the following information displays in the list:

- fee name
- fee percentage from the Receipt total
- fee amount
- if the fee is taxable, the tax amount

To apply the fee to the Receipt, tap **Add**.

If there is a default amount or percentage defined for the fee, the fee is applied at once. If not, the fee edit dialog displays:

Gift Wrapping	
Quantity	1
Sale Total:	\$89.90
Percentage	13.00%
Fee Amount	\$12.00
Tax	\$1.08
Add notes here	
Remove Fee	

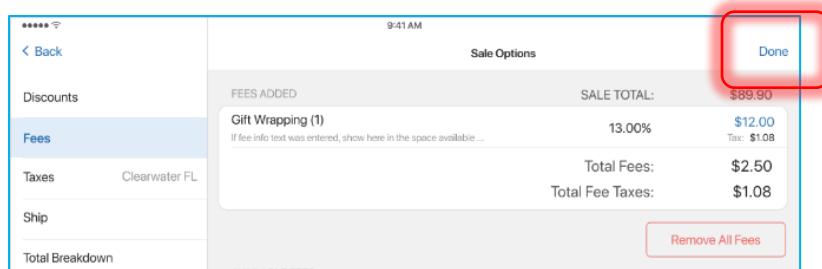
In the dialog, the following fields display:

- **Quantity:** the quantity of fees applied
- **Sale Total:** the current sale total
- **Percentage:** fee percentage
- **Fee Amount:** the amount of the fee
- **Tax:** the tax amount

Tapping **Done** in the upper right corner applies the fee to the Receipt.

Once applied, the fee displays under **Fees Added**. To edit or remove the fee, swipe the fee row left and then tap the required option.

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



Sales Receipt: Open Return

TWD-33255

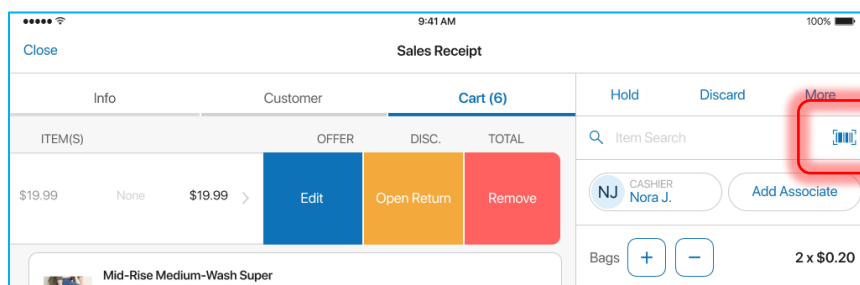
Build 6.21.90

We have added the capability to perform **Open Returns** in the Sales Receipt area of POS.

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

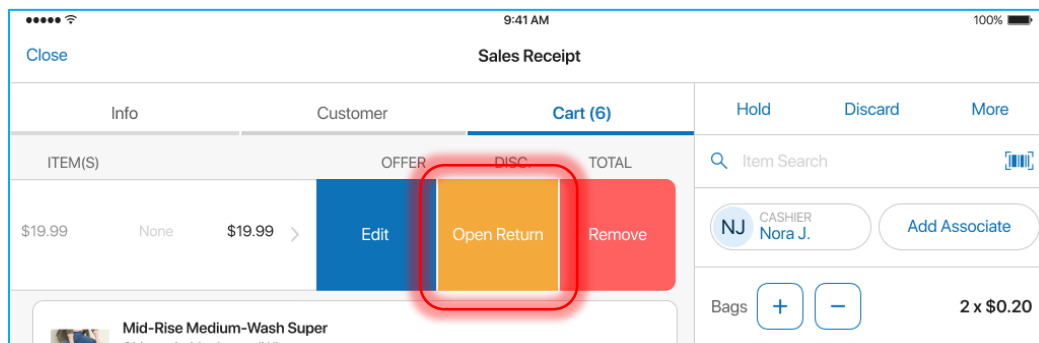
To perform an Open Return in POS:

1. On **Home Screen**, tap **New Sale**.
2. In the **Sales Receipt** area that opens, tap the **Cart** tab at the top.
3. In the **Cart** tab, tap the **barcode** icon in the right-side panel to scan the return item and add it to the cart:



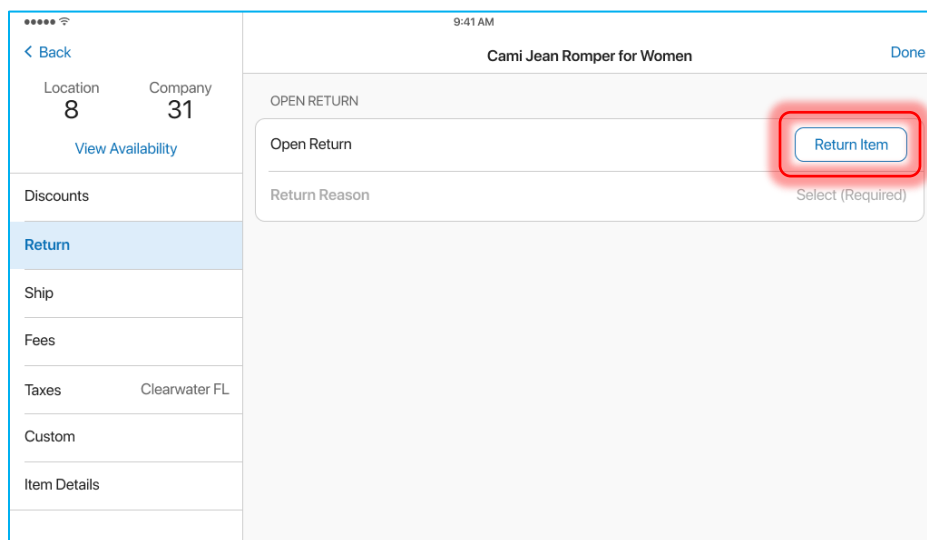
Alternatively, search for it manually via the **Item Search** field.

4. Once the item is added to the cart, swipe the item row left and tap **Open Return**:



On tapping, the **Return** tab of the item edit dialog opens.

5. To make the item an open return, in the **Open Return** field, tap **Return Item**:



Tapping **Return Item** enables the **Return Reason** field below which is always required. Tap **Select** to choose a reason.

6. Once finished, tap **Done** in the upper right corner.

New Drawer Memo area

TWD-28149

Build 6.21.140

We've added Drawer Memo functionality to Teamwork POS Pro version 6.

Drawer Memos (DM) are documents that record all of the incoming and outgoing money within the store.

NOTE: Security rights

Please be advised that new security rights have been added for the POS **Drawer Memo** area. For further details, refer to CHQ Release Guide V6.21

Home Screen

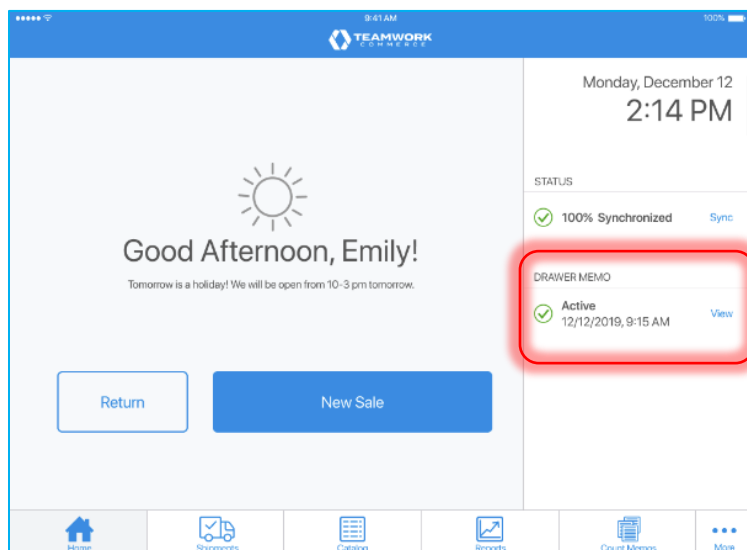
To open the Drawer Memo area from the **Home Screen**, tap **Drawer Memo** in the navigation panel at the bottom or in the **More** menu.

NOTE:

The location of the **Drawer Memo** button on POS **Home Screen** can be defined under **chq > settings > company settings > v6 App Designer > Point of Sale v6 > iPad > Home**.

In **layout**, the first four buttons display in the POS navigation panel at the bottom. The rest display in the **More** menu.

Additionally, on **Home Screen**, the Drawer Memo status displays on the right:



The following statuses are possible:

- **Active:** the current Drawer Memo is active; the date and time of DM creation displays
- **Inactive:** the Drawer Memo is inactive; the date and time of DM creation displays
- **Server Unavailable:** the current Drawer Memo has been saved on the device but not sent to CHQ

If the Memo status is **Active** or **Inactive**, click **View** next to the status to open the current **Drawer Memo**.

Also, if there are no active or inactive DMs, the **Start New Drawer Memo** button displays.

List view

On tapping **Drawer Memo** on **Home Screen**, the Drawer Memo list view opens.

Memo #	Status	Drawer Station	Started	Started By	Finalized	Finalized By
12345	Active	100-1	03/01/2020 09:14 AM	Michael		
12344	Inactive	100-1	03/01/2020 09:14 AM	Jeff		

The list view consists of two tabs: **Drawer Memo** and **History**.

The Drawer Memo tab

The **Drawer Memo** tab (see the screenshot above) contains all Drawer Memos that have not been finalized.

The following columns are available in the grid:

- **Memo #:** the number of the Memo
- **Status:** the status of the Memo; possible values are “Active” and “Inactive”
- **Drawer Station:** the drawer station ID of the POS
- **Started:** the date and time when the Memo was created
- **Started By:** the associate that created the Memo
- **Finalized:** the date and time when the Memo was finalized
- **Finalized By:** the associate that finalized the Memo

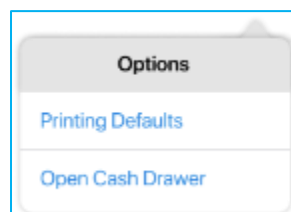
Also, the **Not Sent** badge may display in the column next to **Finalized By** if the Memo hasn't been sent to CHQ. That may happen if, for example, there is no Internet connection.

If all Memos displayed are inactive, the **Start New Drawer Memo** button displays below.

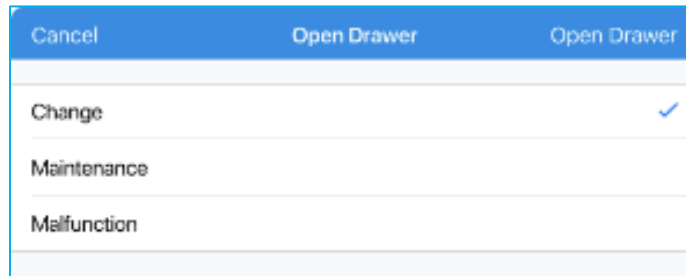
Alternatively, to view or edit an existing Drawer Memo, tap the required row in the list.

Options

On tapping **Options** in the upper right corner, the following menu displays:



- Tapping **Printing Defaults** opens the dialog where you can configure default settings for printing the **Drawer Memo** and the **Deposit Slip**.
- Tapping **Open Cash Drawer** opens the **Open Drawer** dialog:



In the dialog, select the required reason for opening the cash drawer and then tap **Open Drawer** in the upper right corner.

The History tab

The **History** tab of the list view contains all finalized Drawer Memos:

MEMO #	STATUS	DRAWER STATION	STARTED	STARTED BY	FINALIZED	FINALIZED BY
10922	Finalized	100-1	12/12/2018, 08:29	Ron	12/12/2018, 21:18	Devan
10922	Finalized	100-1	12/12/2018, 08:29	Ron	12/12/2018, 21:18	Devan
10922	Finalized	100-1	12/12/2018, 08:29	Ron	12/12/2018, 21:18	Devan
10922	Finalized	100-1	12/12/2018, 08:29	Ron	12/12/2018, 21:18	Devan
10922	Finalized	100-1	12/12/2018, 08:29	Ron	12/12/2018, 21:18	Devan
10922	Finalized	100-1	12/12/2018, 08:29	Ron	12/12/2018, 21:18	Devan
10922	Finalized	100-1	12/12/2018, 08:29	Ron	12/12/2018, 21:18	Devan

The columns in the grid are the same as in the [Drawer Memo tab](#) described above.

Tapping any of the finalized Memos opens it in the read-only mode.

Editing a Drawer Memo

Tapping a row in the Drawer Memo list view opens that **Drawer Memo**.

In **DETAILS** on the left, the following information about the document displays:

DETAILS	
Drawer Memo #	10255
Drawer Station	100-1
Device ID	11095
Status	Active
Last Edit	Nora J. @ 05/31/2020 09:58 AM
Start of Day	Nora J. @ 05/31/2020 08:12 AM
End of Day	
Finalized	

Sales	\$2,250.00
Returns	-\$200.00
Net Sales	\$2,050.00
DRAWER	
Cash in Drawer	\$1,852.00
Over / Short	No
SAFE	
Cash in Safe	\$3,500.00
Over / Short	No

- **Drawer Memo #:** the number of the document
- **Drawer Station:** the ID of the Drawer Station for that POS
- **Device ID:** the ID of the device that have made transactions against that Memo
- **Status:** the status of the Memo; possible values are “Active” and “Inactive”
- **Last Edit:** the date-time when the Memo was last saved and the user who edited it
- **Start of Day:** the date-time when the Start of Day (SOD) process was last saved and the user who edited it
- **End of Day:** the date-time when the End of Day (EOD) process was last saved and the user who edited it
- **Finalized:** the date and time when the Memo was finalized

At the top-right, the **Print** and **Open Drawer** buttons display:

- Tapping **Print** opens the dialog from which it is possible to select either **Drawer Memo** or **Deposit Slip** for printing.
- Tapping **Open Drawer** opens the dialog where it is possible to select a reason for opening the cash drawer, for example, “Maintenance” or “Change”.

Below these buttons, the following fields display:

The screenshot shows a mobile application interface for a 'Drawer Memo'. The top status bar indicates the time is 9:41 AM and the battery is at 100%. The screen title is 'Drawer Memo'. There are two buttons at the top right: 'Open Drawer' and 'Print'. The main content area is divided into several sections:

- Sales Summary:**
 - Sales: \$2,250.00
 - Returns: -\$200.00
 - Net Sales: \$2,050.00
- DRAWER:**
 - Cash in Drawer: \$1,852.00
 - Over / Short: No
- SAFE:**
 - Cash in Safe: \$3,500.00
 - Over / Short: No

At the bottom of the screen, there are three buttons: 'Manage Cash', 'Start of Day', and 'End of Day'. The 'Start of Day' and 'End of Day' buttons are highlighted in blue.

- **Sales:** total sales amount
- **Returns:** total returns amount
- **Net Sales:** the value is calculated by deducting the **Returns** amount from the **Sales** amount

Below, the **DRAWER** and **SAFE** sections display.

NOTE: Enabling safe management in CHQ

For the safe management functionality to work and the **SAFE** section to display on a Drawer Memo, the **safe management** checkbox must be selected in CHQ under **services > device controller > (selected device) > general**.

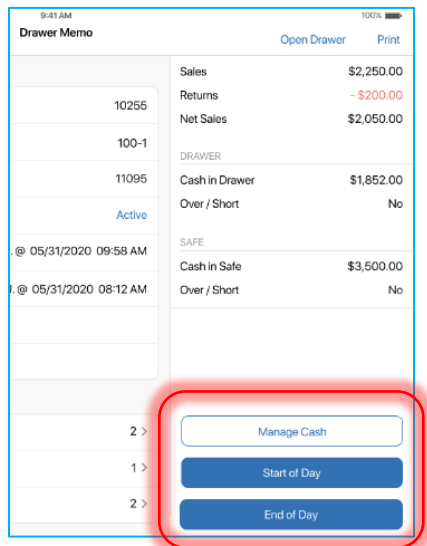
Under **DRAWER**, the following fields display:

- **Cash in Drawer:** the current amount in the drawer
- **Over / Short:** discrepancies recorded in the Start or End of Day processes

Under **SAFE**, the following fields display:

- **Cash in Safe:** the current amount in the safe
- **Over / Short:** discrepancies recorded in the Start or End of Day processes

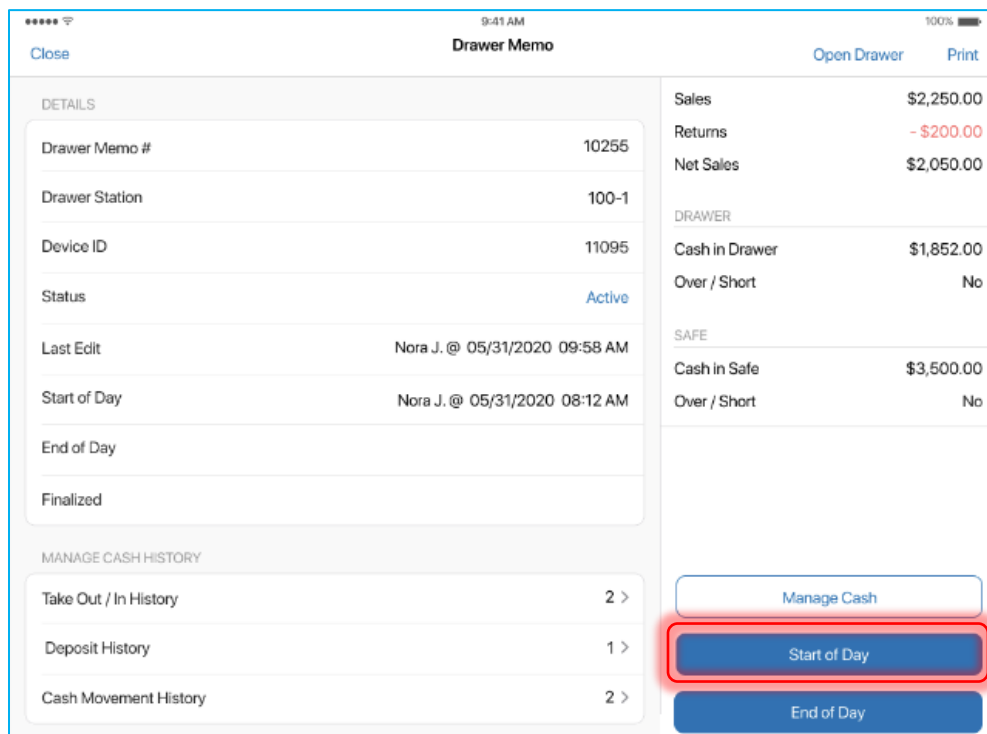
Below the **DRAWER** and **SAFE** sections described above, the following three buttons display:



- **Manage Cash:** opens a dialog from which it's possible to select a type of cash management, for example, "Deposit" or "Move to Safe"
- **Start of Day:** begins the Start of Day process or opens it for editing
- **End of Day:** sets the status of the Memo to "Inactive" and begins the End of Day process

Start of Day

The Start of Day area displays when the user creates a new Drawer Memo. It is also possible to open the **Start of Day** area on tapping **Start of Day** on a Drawer Memo:



The Start of Day process allows for counting cash in both drawer and safe at the start of the day as well as recording any discrepancies with the closing count of the previous Drawer Memo.

Typically, the Start of Day process is completed at the beginning of each day to make the current Drawer Memo active and start making sales.

NOTE:

Completing the Start of Day process is required to change the Drawer Memo status to “Active”.

In the **Start of Day** area, the panel on the left displays sections that the user has to go through to complete the process:

Type	Prev Amount	Prev Count	Count	Amount	Difference
\$100 Bill	0.00	0	0	0.00	0.00
\$50 Bill	0.00	0	0	0.00	0.00
\$20 Bill	200.00	10	10	200.00	0.00
\$10 Bill	200.00	20	20	200.00	0.00
\$5 Bill	200.00	40	40	200.00	0.00
\$1 Bill	200.00	200	200	200.00	0.00
\$1 Coin	0.00	0	0	0.00	0.00

The space to the right of the panel displays data according to the chosen section.

In the left-side panel, three sections are available:

- **SAFE CASH**
- **DRAWER CASH**
- **COMPLETE**

To go to the next section, tap **Next** in the bottom right corner. Alternatively, you can tap the next section in the left-side panel.

Start of Day – Safe Cash

The **SAFE CASH** section allows for counting the amount in the safe. Unlike the drawer cash, only take in or take out records can credit or debit the safe cash.

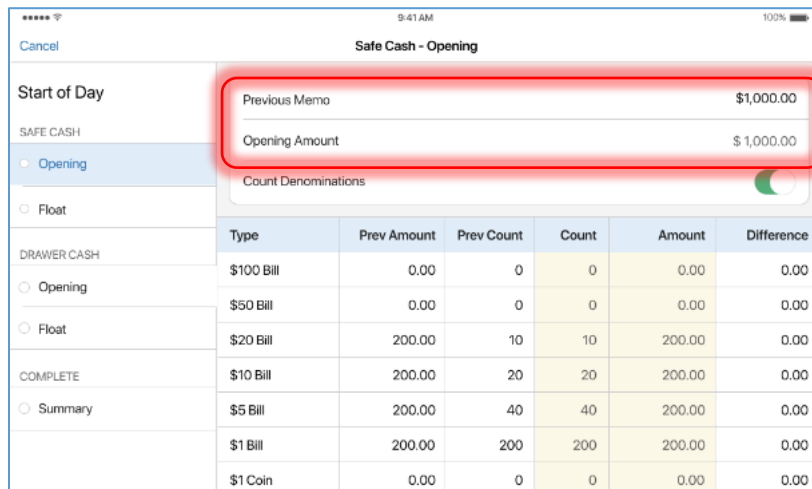
In the **SAFE CASH** section, two sub-sections display: **Opening** and **Float**.

NOTE:

A cash drawer float is a desired balance that you wish to maintain in the cash drawer. Essentially, a cash float is the money that you use to give customers change when they pay in cash.

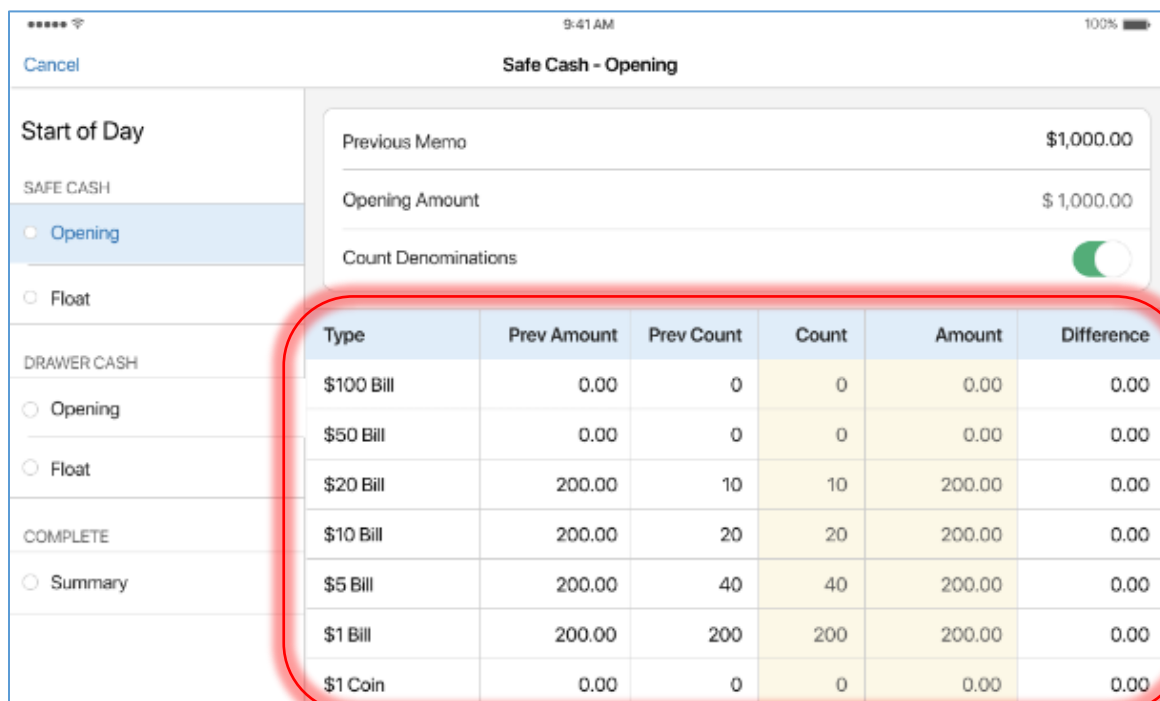
Opening

In the **Opening** sub-section, the following fields display at the top:



- **Previous Memo:** the closing count from the previous Drawer Memo
- **Opening Amount:** the total from the **Amount** column; the counted amount in the safe at the start of the day

In the grid below, the following columns are available:



- **Type:** the bill or coin denomination
- **Prev Amount:** the closing amount from the previous Drawer Memo; calculated as **Prev Count * Type**
- **Prev Count:** the closing count of bills or coins from the previous Drawer Memo
- **Count:** the current number of bills or coins; editable; entering a value automatically updates the corresponding **Amount** value
- **Amount:** the current amount in the safe; editable; entering a value automatically updates the corresponding **Count** value
- **Difference:** the difference between the **Prev Amount** and **Amount** values

Please note that the count amount from the **Opening** screen becomes the float for the respective drawer memo.

When finished configuring the **Opening** sub-section, tap **Next** in the bottom right corner or tap the **Float** sub-section in the left-side panel.

Float

In the **Float** sub-section, the following fields display at the top:

Type	Plan Amount	Plan	Count	Count Amount	Difference
\$100 Bill	0.00	0	0	0.00	0.00
\$50 Bill	0.00	0	0	0.00	0.00
\$20 Bill	200.00	10	10	200.00	0.00
\$10 Bill	200.00	20	20	200.00	0.00
\$5 Bill	200.00	40	40	200.00	0.00
\$1 Bill	200.00	200	200	200.00	0.00
\$1 Coin	0.00	0	0	0.00	0.00
50 Cents	0.00	0	0	0.00	0.00
Total	\$1,000.00			\$1,000.00	\$0.00

- **Planned Float:** the float (denomination) plan used for that Memo

NOTE:

The float plan defines how the cash drawer or safe should be loaded at the store opening. The plan comes from the previously closed Drawer Memo, the same Memo that the previous counts come from.

- **Plan Amount:** the total amount defined by the **Planned Float**
- **Actual Count:** the total from the count on the **Opening** tab

NOTE:

The **Planned Float**, **Plan Amount**, and **Actual Count** fields are read-only.

In the grid below the fields, the following columns are available for reviewing:

Type	Plan Amount	Plan	Count	Count Amount	Difference
\$100 Bill	0.00	0	0	0.00	0.00
\$50 Bill	0.00	0	0	0.00	0.00
\$20 Bill	200.00	10	10	200.00	0.00
\$10 Bill	200.00	20	20	200.00	0.00
\$5 Bill	200.00	40	40	200.00	0.00
\$1 Bill	200.00	200	200	200.00	0.00
\$1 Coin	0.00	0	0	0.00	0.00
Total	\$1,000.00			\$1,000.00	\$0.00

- **Type:** a bill or coin denomination
- **Plan Amount:** the amount calculated as **Plan * Type**
- **Plan:** the count of bills and coins defined by the **Planned Float**
- **Count:** the count from the Opening tab for each denomination
- **Count Amount:** the amount for each denomination from the opening tab
- **Difference:** the difference between the **Plan Amount** and **Count Amount**

When finished reviewing the **Float** sub-section, tap **Next** in the bottom right corner or tap the **DRAWER CASH > Opening** sub-section in the left-side panel.

Also, you can return to the **Opening** tab and change the actual count values.

Start of Day – Drawer Cash

The **DRAWER CASH** section allows for counting the amount in the cash drawer.

The section contains two sub-sections: **Opening** and **Float**.

Opening

The fields and the grid displayed in **DRAWER CASH > Opening** are the same as described in Safe Cash – Opening.

The **Open Drawer** button at the bottom allows for opening the cash drawer:

The screenshot displays the 'Drawer Cash - Opening' screen. At the top, there is a 'Cancel' button and the title 'Drawer Cash - Opening'. Below the title, there are three input fields: 'Previous Memo' with a value of \$100.00, 'Opening Amount' with a value of \$100.00, and 'Count Denominations' with a toggle switch turned on. The main part of the screen is a table with the following data:

Type	Prev Amount	Prev Count	Count	Amount	Difference
\$100 Bill	0.00	0	0	0.00	0.00
\$50 Bill	0.00	0	0	0.00	0.00
\$20 Bill	200.00	10	10	200.00	0.00
\$10 Bill	0.00	0	24	240.00	0.00
\$5 Bill	200.00	40	40	200.00	0.00
\$1 Bill	200.00	200	200	200.00	0.00
\$1 Coin	0.00	0	0	0.00	0.00
50 Cents	0.00	0	0	0.00	0.00
Total	\$100.00			\$100.00	\$0.00

At the bottom of the screen, there is an 'Open Drawer' button (highlighted with a red box) and a 'Next' button.

When finished configuring the **Opening** sub-section, tap **Next** in the bottom right corner or tap the **Float** sub-section in the left-side panel.

Float

The fields and the grid displayed in **DRAWER CASH > Float** are the same as described in **SAFE CASH > Float**.

When finished reviewing the **Float** sub-section, tap **Next** in the bottom right corner or tap the **Complete > Summary** sub-section in the left-side panel.

Also, you can return to the **Opening** tab and change the actual count values.

Start of Day – Complete

The **COMPLETE** section consists of the **Summary** sub-section with the information from the **Safe Cash** and **Drawer Cash** sections as well as several options:

Under **OPTIONS**, the following fields display:

- **Print Start of Day on Complete:** option to indicate if the Start of Day information should be printed on tapping **Complete**
- **Notes:** option to add notes; required if the **require notes to finalize drawer memo with over/short** settings is enabled in CHQ and there is an **Opening Difference** either in **Safe Cash** or **Drawer Cash**

NOTE: Configuration in CHQ

The **require notes to finalize drawer memo with over/short** checkbox can be configured under **chq > settings > drawer management > drawer memo settings**.

- **Opening Verification:** displays the user who verified the opening counts; required if the **require verification login for start/end of day** setting is enabled in CHQ

NOTE: Configuration in CHQ

The **require verification login for start/end of day** checkbox can be configured under **chq > settings > location settings > locations / location settings > (selected location) > general settings**.

Under **SAFE CASH**, if the safe management functionality is enabled for the device, the following fields display:

- **Opening Amount:** shows the opening amount (the count amount from the **Opening** tab)
- **Opening Difference:** shows the difference amount from the **Opening** tab

NOTE: Configuration in CHQ

The **safe management** setting can be configured under **chq > services > device controller > (selected device) > general**.

Under **DRAWER CASH**, the following fields display:

- **Opening Amount:** shows the opening amount (the count amount from the **Opening** tab)
- **Opening Difference:** shows the difference amount from the **Opening** tab

Under **SOD INFO**, the following fields display:

- **Started:** the date-time when the Start of Day process was completed and the associate who completed
- **Last Edited:** the date-time when the Start of Day was opened after completion and the user who edited

To finish the Start of Day process and make the Drawer Memo active, tap **Complete** at the bottom.

End of Day

The End of Day process deactivates the Drawer Memo and allows for counting cash at the end of the day.

In the **End of Day** area, the panel on the left displays sections which the user has to go through to complete the process:

Count \$2,135.50

Type	Count	Amount
\$100 Bill	0	0.00
\$50 Bill	0	0.00
\$20 Bill	10	200.00
\$10 Bill	24	240.00
\$5 Bill	40	200.00
\$1 Bill	200	200.00
\$1 Coin	0	0.00
50 Cents	0	0.00
25 Cents	0	0.00
10 Cents	0	0.00
Total		\$2,135.50

Open Drawer Clear Counts Next

The space to the right of the panel displays data in accordance with the chosen section.

In the left-side panel, the following sections are available:

- **PAYMENTS**
- **DRAWER CASH**
- **SAFE CASH**
- **FINALIZE**

To go to the next section, tap **Next** in the bottom right corner. Also, you can tap the section in the left-side panel.

End of Day – Payments

The **PAYMENTS** section contains information on payments taken during the day.

The information is available for each payment method separately:

- **Cash**
- **Credit Card**
- **Check**
- **Offline Credit Card**
- **House Charge**

NOTE:

In 6.21.140, only **Cash**, **Offline Credit Card**, and **Offline Credit Card Credit** payments are available.

Such information includes:

- **Payments:** shows the total of all payments for that payment method
- **Returns & Void/Reverse:** shows the total amount returned to customers
- **Net Total:** shows the difference between Payments and Returns & void/Reverse

Also, for the selected payment method, the information on each transaction is available. This information includes:

- transaction number
- transaction date/time
- amount associated with that transaction

End of Day – Drawer Cash

In **DRAWER CASH**, it is possible to count the amount in the drawer at the end of the day.

Under **DRAWER CASH**, the following three sub-sections are available:

- **Count**
- **Float**
- **Summary**

Count

In **Count**, the grid with the following columns is available:

Type	Count	Amount
\$100 Bill	0	0.00
\$50 Bill	0	0.00
\$20 Bill	10	200.00
\$10 Bill	24	240.00
\$5 Bill	40	200.00
\$1 Bill	200	200.00
\$1 Coin	0	0.00
50 Cents	0	0.00
25 Cents	0	0.00
10 Cents	0	0.00
Total		\$2,135.50

- **Type:** the bill or coin denomination
- **Count:** the current number of bills or coins in the drawer; editable; entering a value automatically updates the corresponding **Amount** value
- **Amount:** the current amount in the drawer; editable; entering a value automatically updates the corresponding **Count** value

At the top, the **Count** field displays the total amount in the drawer at the time of counting.

At the bottom, the following two buttons display:

- **Open Drawer:** opens the cash drawer
- **Clear Counts:** clears all **Count** and **Amount** values in the grid above

When finished configuring the **Count** sub-section, tap **Next** in the bottom right corner or tap the **Float** sub-section in the left-side panel.

Float

In **Float**, the grid with the following columns displays:

Type	Plan Amount	Plan	Float	Float Amount	Difference
\$100 Bill	0.00	0	0	0.00	0.00
\$50 Bill	0.00	0	0	0.00	0.00
\$20 Bill	200.00	10	10	200.00	0.00
\$10 Bill	0.00	0	24	240.00	0.00
\$5 Bill	200.00	40	40	200.00	0.00
\$1 Bill	200.00	200	200	200.00	0.00
\$1 Coin	0.00	0	0	0.00	0.00
Total	\$100.00			\$100.00	\$0.00

- **Type:** a bill or coin denomination
- **Plan Amount:** the amount calculated as **Plan * Type**
- **Plan:** the count of bills and coins defined by the denomination **Plan**

- **Float:** the current number of bills and coins in the drawer; editable; entering a value updates the corresponding **Float Amount** value
- **Float Amount:** the current amount in the drawer; editable; entering a value updates the corresponding **Float** value
- **Difference:** the difference between the **Plan Amount** and **Float Amount**

At the top, the following two fields display:

- **Planned Float:** allows for selecting the denomination plan; once the required plan is selected, the planned values for each denomination are updated in the grid below

WARNING:

Please be advised that the float (denomination) plan specified during EOD will be applied to the next day. It is not possible to change the plan during Start of Day. The float plan defines how the cash drawer or safe should be loaded at the store opening.

- **Plan Amount:** the planned total amount set by the current denomination plan; equals the total of the Plan Amount column in the grid
- **Actual Float:** total float amount

When the tab displays for the first time, the float count and amount are defaulted to match the current plan count / amount.

At the bottom, the **Reset Float** button is available that resets all the **Float** values in the grid to zero.

When finished configuring the **Float** sub-section, tap **Next** in the bottom right corner or tap the **Summary** sub-section in the left-side panel.

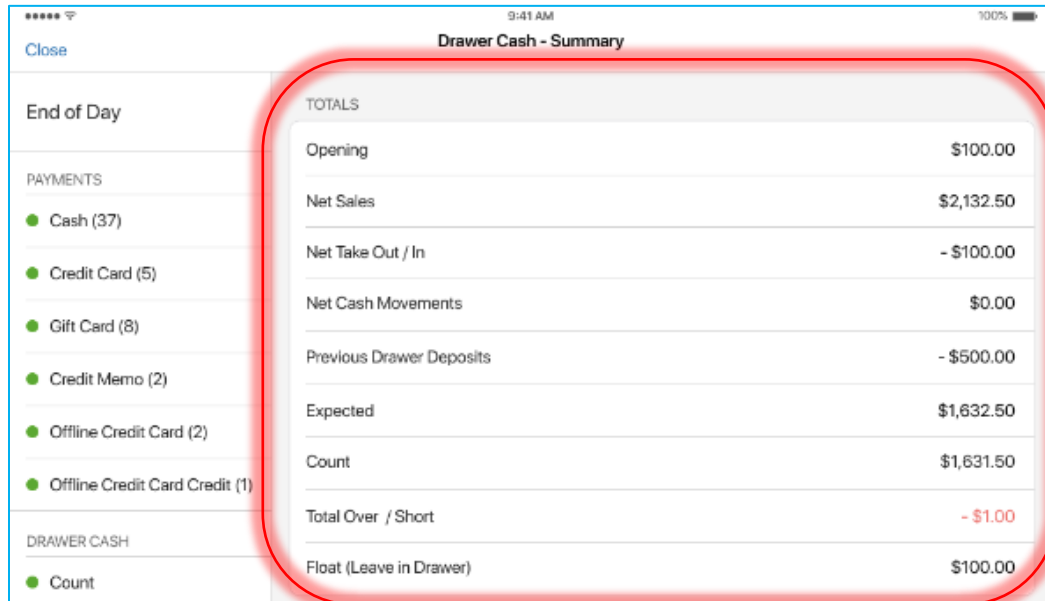
WARNING:

If the user defines the float amount to be greater than the amount available in the drawer, on clicking **Next**, the **Float Exceeds Count** warning displays.

The same warning displays if the user tries to finalize the EOD / DM in the similar situation.

Summary

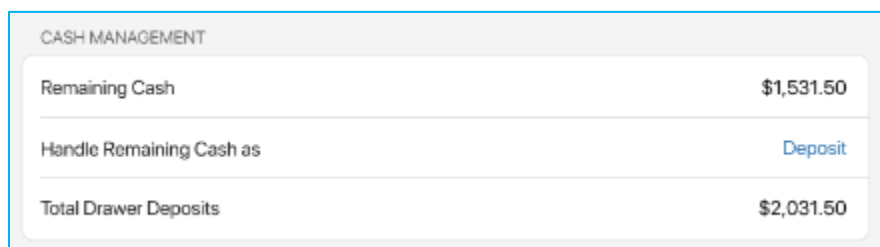
In **Summary**, under **TOTALS**, the following fields are available:



TOTALS	
Opening	\$100.00
Net Sales	\$2,132.50
Net Take Out / In	-\$100.00
Net Cash Movements	\$0.00
Previous Drawer Deposits	-\$500.00
Expected	\$1,632.50
Count	\$1,631.50
Total Over / Short	-\$1.00
Float (Leave in Drawer)	\$100.00

- **Opening:** the opening count from the associated Start of Day process
- **Net Sales:** net sales amount (after deduction of return amounts)
- **Net Take Out / In:** the total amount from Take In and Take Out records on that Memo
- **Net Cash Movements:** the net total from **Move to Drawer** and **Move to Safe** records on that Memo
- **Previous Drawer Deposits:** the total of all deposits created
- **Expected:** the sum of **Opening**, **Net Sales**, **Net Take Out / In**, **Net Cash Movements**, and **Previous Drawer Deposits**
- **Count:** the total count amount from **Drawer Cash > Count**
- **Total Over / Short:** calculated as **Expected** minus **Count**
- **Float (Leave in Drawer):** the total **Float Amount** under **Drawer Cash > Float**

Under **CASH MANAGEMENT**, the following fields are available:



CASH MANAGEMENT	
Remaining Cash	\$1,531.50
Handle Remaining Cash as	Deposit
Total Drawer Deposits	\$2,031.50

- **Remaining Cash:** the difference between **Count** and **Float (Leave in Drawer)**
- **Handle Remaining Cash as:** how the remaining cash should be handled; tap the value to choose what record to create: either **Deposit** or **Move to Safe**

NOTE:

The default option for the **Handle Remaining Cash as** field can be defined under **chq > settings > location settings > locations / location settings > (selected location) > general settings > end of day excess cash handling**.

- **Total Drawer Deposits:** total of deposits made on that Memo

When finished, tap **Next** in the bottom right corner or tap the **Count** sub-section under **SAFE CASH** in the left-side panel.

End of Day – Safe Cash

The **SAFE CASH** section allows for counting the amount in the safe at the end of the day.

In **SAFE CASH**, the following sub-section are available:

- **Count**
- **Float**
- **Summary**

The information contained in the **SAFE CASH** sub-sections is equivalent to that under **DRAWER CASH** sub-sections.

Summary

In **Summary**, under **TOTALS**, the following information displays:

TOTALS	
Opening	\$500.00
Net Take Out / In	\$500.00
Net Cash Movements	\$0.00
Previous Safe Deposits	\$0.00
Expected	\$1,000.00
Count	\$999.00
Total Over / Short	-\$1.00
Float (Leave in Safe)	\$1,000.00

- **Opening:** the opening count from the associated Start of Day process
- **Net Take Out / In:** the total amount from Take In and Take Out records on that Memo
- **Net Cash Movements:** the net total from **Move to Drawer** and **Move to Safe** records on that Memo
- **Previous Safe Deposits:** the total of all deposits created

- **Expected:** the sum of **Opening, Net Take Out / In, Net Cash Movements,** and **Previous Safe Deposits**
- **Count:** the total **Amount** from **Safe Cash – Count**
- **Total Over / Short:** calculated as **Expected** minus **Count**
- **Float (Leave in Safe):** the total **Float Amount** under **Safe Cash – Float**

Under **CASH MANAGEMENT**, the following fields are available:

CASH MANAGEMENT	
Remaining Cash	- \$1.00
Handle Remaining Cash as	Take In
Total Safe Deposits	\$0.00

- **Remaining Cash:** the difference between **Count** and **Float (Leave in Safe)**
- **Handle Remaining Cash as:** how the remaining cash should be handled; tap the value to choose what record to create: either **Deposit** or **Take In**
- **Total Safe Deposits:** total of deposits from the safe

End of Day – Finalize

In **Finalize**, under **OPTIONS**, the following fields are available for configuration:

- **Print Drawer Memo on Finalize:** if the Drawer Memo should be printed on finalizing
- **Print Deposit Slip on Finalize:** if deposit slips for both drawer and safe should be printed on finalizing
- **Notes:** option to add notes; required if the **require notes to finalize drawer memo with over/short** settings is enabled in CHQ and there is an **Over / Short** value either in **Safe Cash** or **Drawer Cash**
- **Closing Verification:** displays the user who verified the closing counts; required if the **require verification login for start/end of day** setting is enabled in CHQ

NOTE: Configuration in CHQ

The **require verification login for start/end of day** checkbox can be configured under **chq > settings > location settings > locations / location settings > (selected location) > general settings**.

Under **SALES**, the following fields are available:

- **Sales:** total sales amount on the Drawer Memo
- **Returns:** total returns amount on the Drawer Memo
- **Net Sales:** calculated as **Sales** minus **Returns**

Under **SAFE CASH**, the following information is available:

SAFE CASH	
Over / Short	-\$1.00
Float (Leave in Safe)	\$1,000.00
Total Safe Deposits	\$0.00

- **Over / Short:** the difference between the expected amount and the actual count of the safe cash
- **Float (Leave in Safe):** the total float amount in the safe
- **Total Safe Deposits:** the total amount of deposits from the safe

Under **DRAWER CASH**, the following fields are available:

- **Over / Short:** the difference between the expected amount and the actual count of the drawer cash
- **Float (Leave in Drawer):** the total float amount in the drawer
- **Total Drawer Deposits:** the total amount of deposits from the drawer

Under **DEPOSIT**, the following fields are available:

DEPOSIT	
Total Deposits	\$2,031.50
Deposit Confirmation	Select (Required)
USER INFO	
End of Day	
Last Edited	Jeff @ 12/12/2020, 22:04
<input type="button" value="FINALIZE"/>	

- **Total Deposits:** the total of the safe and drawer deposit records

- **Deposit Confirmation:** the option to open the login dialog and enter the user’s credentials; required if there are deposits on the Drawer Memo

Under **USER INFO**, the following information is available:

- **End of Day:** the date-time when the Memo was finalized and the user who finalized it
- **Last Edited:** the date-time when the End of Day process was last saved and the user who saved it

To save the End of Day process and finalize the Drawer Memo, tap **Finalize** in the bottom right corner.

Modification to the new Drawer Memo area

TWD-37883

Build 6.21.331

This feature is a modification to the [New Drawer Memo area](#) feature described in this Release Guide.

In 6.21.331, we’ve updated the **Start of Day** and **End of Day** areas associated with Drawer Memo.

Changes in the Start of Day area

In the **Start of Day** area, the following changes have been made:

1. For both **Drawer Cash** and **Safe Cash**, the **Opening** tab has been renamed to **Opening Count** (“1” in the screenshot).

2. For both **Drawer Cash** and **Safe Cash**, the **Previous Memo** field has been renamed to **Previous Amount** (“2” in the screenshot).

3. In all the denomination grids of the **Start of Day** area, the **Type** column has been renamed to **Denomination** (“3” in the screenshot).

	Denomination	Prev Amount	Prev Count	Plan Count	Count	Amount	Previous Diff
DRAWER CASH							
SAFE CASH							
COMPLETE							
Summary							
	\$100 Bill	0.00	0	0	0	0.00	0.00
	\$50 Bill	0.00	0	0	0	0.00	0.00
	\$20 Bill	200.00	10	10	10	200.00	0.00
	\$10 Bill	200.00	20	20	20	200.00	0.00
	\$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	\$0.00

- In the denomination grid of the **Opening Count** tab, the **Difference** column has been renamed to **Previous Diff** (“4” in the screenshot above).
- Under **DRAWER CASH – Opening Count**, a new **Plan Count** column has been added to the denominations grid. The **Plan Count** column displays the planned amount from the previous Drawer Memo (“5” in the screenshot above).
- The denomination grids no longer display for **SAFE CASH**.

Additionally, the **Float** tab has been removed from both **DRAWER CASH** and **SAFE CASH**.

Changes in the End of Day area

We’ve made updates to several tabs in the **End of Day** area.

Updates under DRAWER CASH

Under **DRAWER CASH**, the following changes have been made:

- For both **DRAWER CASH** and **SAFE CASH**, the **Count** tab has been renamed to **Closing Count** (“1” in the screenshot below).
- Under **DRAWER CASH – Closing Count**, a new **Expected Amount** field has been added (“2” in the screenshot below). The **Expected Amount** field displays the cash amount that is expected to be present in the drawer at the end of the day.
- Under **DRAWER CASH – Closing Count**, the **Count** field has been renamed to **Counted Amount** (“3” in the screenshot below).

Drawer Cash - Closing Count

Expected Amount ² \$2,135.50

Counted Amount ³ \$2,135.50

Denomination	Count	Amount
\$100 Bill	0	0.00
\$50 Bill	0	0.00
\$20 Bill	10	200.00
\$10 Bill	24	240.00
\$5 Bill	40	200.00
\$1 Bill	200	200.00
\$1 Coin	0	0.00
50 Cents	0	0.00
25 Cents	0	0.00
Total		\$2,135.50

Buttons: Open Drawer, Clear Counts, Next

- Under **DRAWER CASH – Cash Handling**, the following changes have been made:

- the **Count** field has been renamed to **Closing Count**
- the **Float** field has been renamed to **Next Drawer Float**
- the new **Balance** field displays the amount to be deposited or moved to safe (calculated as **Remaining Cash** minus **Take Out**)
- the **Handle Remaining Cash** field has been renamed to **Handle Balance as**

5. Under **DRAWER CASH – Summary**, the following changes have been made:

- the **Opening** field has been renamed to **Opening Amount**
- the **Net Sales** field has been renamed to **Net Cash Payments**
- the **Net Cash Movements** field has been renamed to **Net Safe Movements**
- the **Previous Drawer Deposits** field has been renamed to **Previous Deposits**
- the **Expected** field has been renamed to **Expected Amount**
- the **Count** field has been renamed to **Counted Amount**
- the **Float (Leave in Drawer)** field has been renamed to **Next Drawer Float**
- the **Cash Handling Take Out** field has been renamed to **Closing Drawer Take Out**
- the **Remaining Cash** field has been renamed to **Balance**
- the **Handle Remaining Cash as** and the **Total Drawer Deposits** fields have been removed
- the new **Deposit Amount** and **Move to Safe Amount** fields have been added

Changes under SAFE CASH

Under **SAFE CASH**, the following changes have been made:

1. The denominations grid no longer displays for **SAFE CASH**.

2. Under **SAFE CASH – Closing Count**, the following two fields have been added:

- the **Over / Short** field displays the difference between **Expected Amount** and **Counted Amount**
- the **Next Drawer Float** field displays the float amount for the next **Drawer Memo** defined by the user

3. The **Float** tab has been renamed to **Next Drawer Float**. In **Next Drawer Float**, the following fields have been renamed:

- **Planned Float** to **Denomination Plan**
- **Plan Amount** to **Denomination Plan Amount**
- **Actual Float** to **Next Day Float Amount**

4. Under **SAFE CASH – Summary**, the following fields have been renamed:

- the **Count** field to **Opening Amount**
- the **Net Cash Movements** field to **Net Safe Movements**
- the **Previous Safe Deposits** field to **Previous Deposits**

- the **Expected** field to **Expected Amount**
- the **Count** field to **Counted Amount**
- the **Float** field to **Next Safe Float**

Managing cash in drawer and safe

TWD-33202

Build 6.21.140

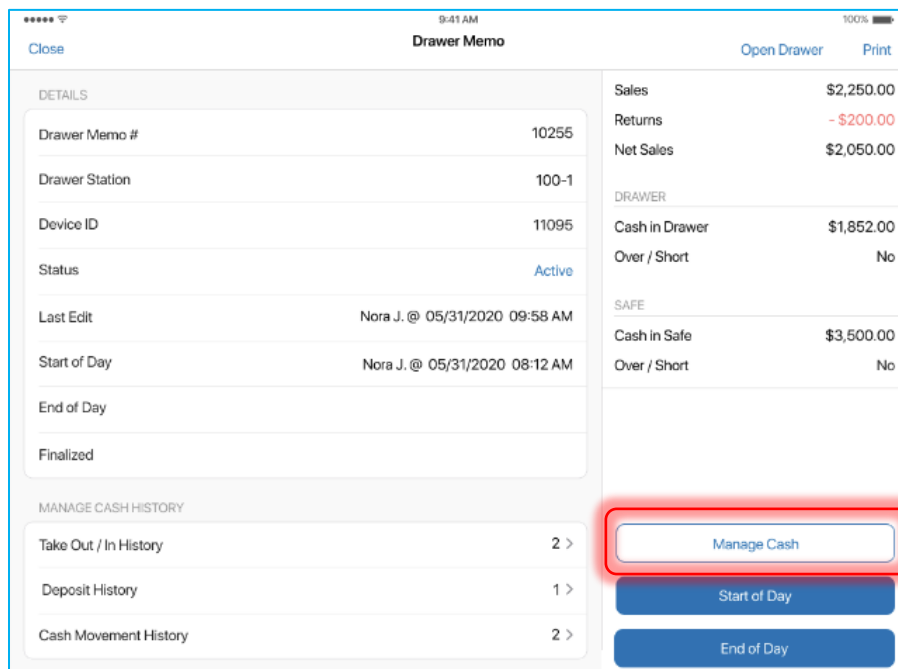
The cash management feature introduces the capability to manage cash from drawer to safe (and vice versa) as well as record bank deposits and cash drops against the active Drawer Memo.

NOTE:

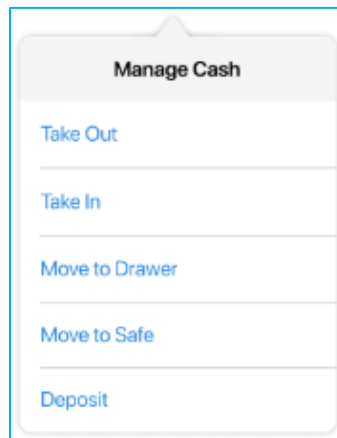
For safe management to be available in POS, the **safe management** checkbox must be selected in CHQ under **services > device controller > (selected device) > general**.

To manage cash on a Drawer Memo, in POS:

1. On the **Home Screen**, tap **Drawer Memo** in the navigation panel at the bottom or in the **More** menu. On tapping, the **Drawer Memo** list view opens.
2. In the list view, tap the required row to open your Drawer Memo.
3. On the Drawer Memo, tap **Manage Cash**:



On tapping, the list of the following cash management options displays:



Tap the required option to open the area with the corresponding records.

Creating a Take Out record

A **Take Out** record indicates that cash has been taken out of the drawer or safe, for example, to pay for store maintenance or to give change to a customer.

On tapping **Take Out** in the **Manage Cash** dialog, the **Take Out** dialog displays.

In the dialog, the following fields display:

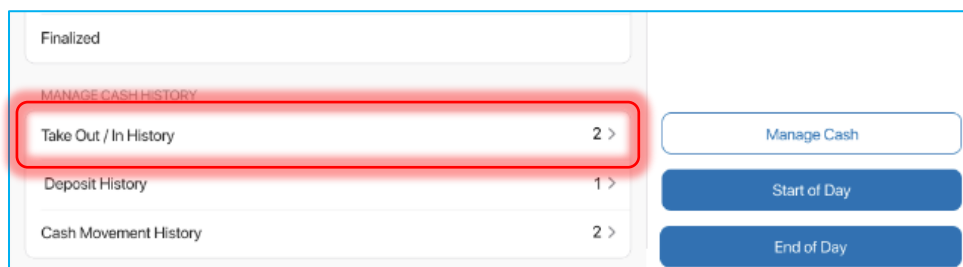
- **Reason:** the reason for taking out the cash; required
- **Source:** possible values are "Drawer" and "Safe"
- **Amount:** the amount taken
- **Notes:** user-defined notes

Tapping **Open Drawer** below allows for opening the drawer to take out cash.

Once finished configuring the fields, tap **Done** in the upper right corner to save the take record.

The Take Out / In area

To open the **Take Out / In area**, when in the **Drawer Memo** dialog, tap **Take Out / In History**:



In the area, the list of all **Take Out** and **Take In** records displays:

Type	Date/Time	Created By	Reason	Amount	Source	Disposition
Out	03/01/2020 09:14 AM	Michael	Store Maintenance	\$100.00	Drawer	Voided
In	03/01/2020 09:14 AM	Jeff	Change	\$10.00	Drawer	

In the grid, the following columns are available:

- **Type:** the type of the record; possible values are “Out” or “In”
- **Date/Time:** the date and time when the record was created
- **Created By:** the associate who created the record
- **Reason:** the reason for creating a take record
- **Amount:** the amount taken or deposited
- **Source:** possible values are “Drawer” and “Safe”
- **Status:** the status of the record; the “Voided” status appears for voided records

To void a take record, swipe the required row left and then tap **Void**.

Creating a Take In record

A **Take In** record indicates that cash has been put into the drawer or safe, for example, on receiving change from a customer.

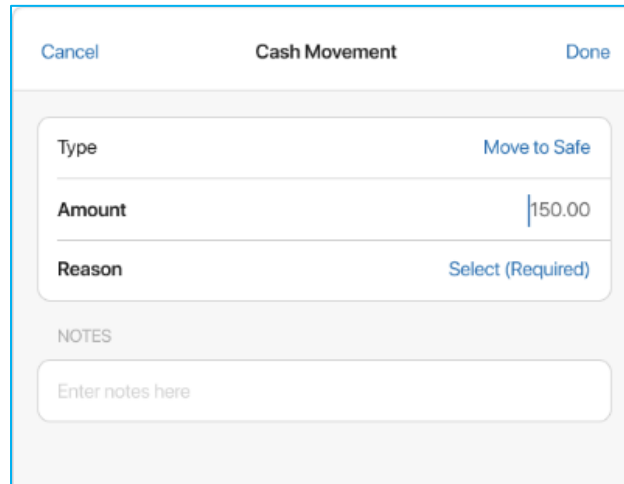
On tapping **Take In** in the **Manage Cash** dialog, the **Take In** dialog displays with the same options as in the **Take Out** dialog described above.

Move to Drawer and Move to Safe

There are two types of cash movement records available:

- **Move to Drawer:** moving cash from the safe to the drawer
- **Move to Safe:** moving cash from the drawer to the safe

On tapping the required option in the **Cash Management** dialog, the **Cash Movement** dialog opens:



The screenshot shows a dialog box titled "Cash Movement". At the top, there are three buttons: "Cancel" on the left, "Cash Movement" in the center, and "Done" on the right. Below the title bar, there are three input fields: "Type" with a dropdown menu currently showing "Move to Safe", "Amount" with a text input field containing "150.00", and "Reason" with a dropdown menu showing "Select (Required)". Below these fields is a section labeled "NOTES" with a text input field containing the placeholder text "Enter notes here".

In the dialog, the following fields are available:

- **Type:** either **Move to Safe** or **Move to Drawer**
- **Amount:** the amount to move
- **Reason:** the reason for cash movement; required
- **Notes:** user-defined notes

If the cash is being moved from the drawer to the safe, tap **Open Drawer** at the bottom to take out the cash.

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

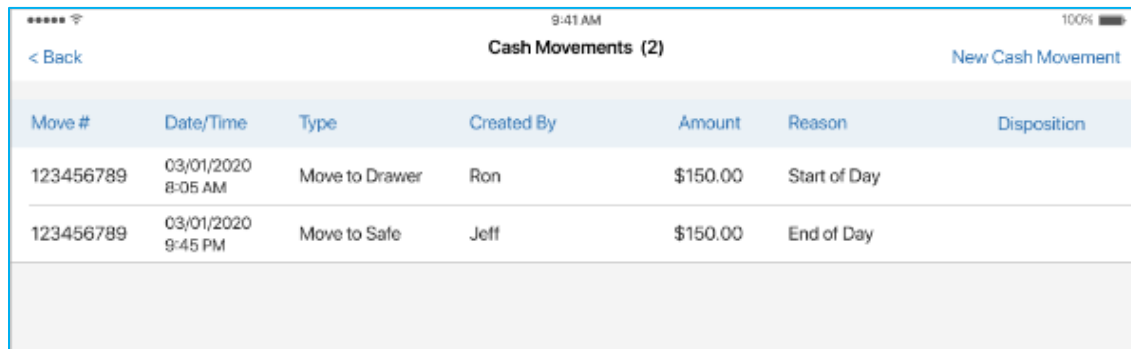
The Cash Movements area

To open the **Cash Movements** area, when in the **Drawer Memo** dialog, tap **Cash Movement History**:



The screenshot shows a section of the "Drawer Memo" dialog titled "MANAGE CASH HISTORY". On the left, there is a list of items: "Finalized", "Take Out / In History" (with a count of 2 and a right arrow), "Deposit History" (with a count of 1 and a right arrow), and "Cash Movement History" (with a count of 2 and a right arrow). The "Cash Movement History" item is highlighted with a red rectangular border. On the right side of the dialog, there are three buttons: "Manage Cash", "Start of Day", and "End of Day".

The area contains the list of all cash movement records on the Drawer Memo:

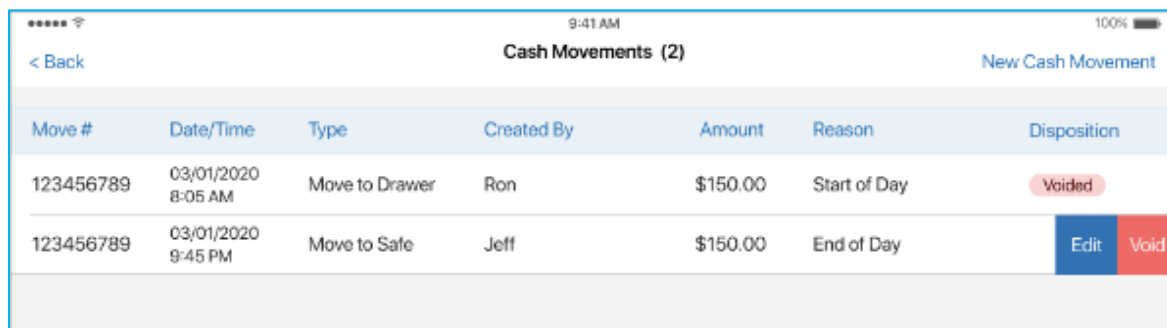


Move #	Date/Time	Type	Created By	Amount	Reason	Disposition
123456789	03/01/2020 8:05 AM	Move to Drawer	Ron	\$150.00	Start of Day	
123456789	03/01/2020 9:45 PM	Move to Safe	Jeff	\$150.00	End of Day	

In the grid, the following columns are available:

- **Move #:** the unique number of the record
- **Date/Time:** the date-time when the record was created
- **Type:** either “Move to Drawer” or “Move to Safe”
- **Created by:** the user who created the document
- **Amount:** the amount moved
- **Reason:** the reason for cash movement
- **Disposition:** if the records has been voided; if yes, displays the “Voided” label

To void a record, swipe the required row left and then tap **Void**:

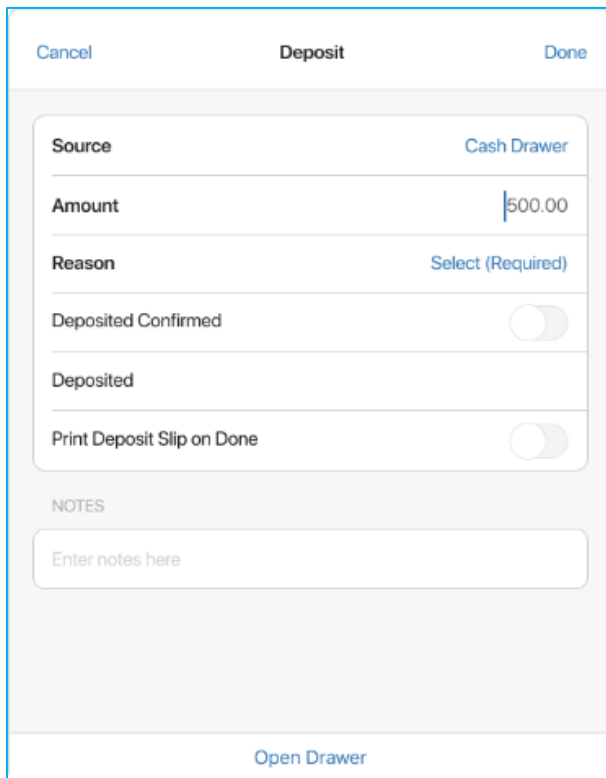


Move #	Date/Time	Type	Created By	Amount	Reason	Disposition
123456789	03/01/2020 8:05 AM	Move to Drawer	Ron	\$150.00	Start of Day	Voided
123456789	03/01/2020 9:45 PM	Move to Safe	Jeff	\$150.00	End of Day	Edit Void

Creating a Deposit record

A **Deposit** record indicates that cash has been removed from the safe or the drawer and taken to the bank.

On tapping **Deposit** in the **Cash Management** dialog, the **Deposit** dialog opens:



The screenshot shows a mobile application dialog titled "Deposit". At the top, there are three buttons: "Cancel" on the left, "Deposit" in the center, and "Done" on the right. Below the title bar is a form with several fields:

- Source:** A dropdown menu currently showing "Cash Drawer".
- Amount:** A text input field containing "500.00".
- Reason:** A dropdown menu showing "Select (Required)".
- Deposited Confirmed:** A toggle switch that is currently turned off.
- Deposited:** A text input field for recording the date and time.
- Print Deposit Slip on Done:** A toggle switch that is currently turned off.

Below the form is a section labeled "NOTES" with a text input field containing the placeholder "Enter notes here". At the bottom of the dialog is a button labeled "Open Drawer".

In the dialog, the following fields are available for configuration:

- **Source:** either Cash Drawer or Safe
- **Amount:** the amount deposited
- **Reason:** the reason for the deposit; required
- **Deposit Confirmed:** if the deposit is confirmed and money is moved to the bank; once the switch is turned on, becomes read-only
- **Deposited:** the date-time when the deposit was confirmed and the user who confirmed
- **Print Deposit Slip on Done:** if the deposit slip should be printed on tapping Done
- **Notes:** user-defined notes

If the cash is being deposited from the drawer, tap **Open Drawer** at the bottom to take out the money.

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

The Deposits area

To open the **Deposits** area, when in the **Drawer Memo** dialog, tap **Deposit History**:



The area contains the list of all deposit records on the Drawer Memo:

Deposit #	Date/Time	Created By	Source	Amount	Reason	Confirmed	Disposition
123456789	03/01/2020 11:44 AM	Ron	Safe	\$500.00	Safe float decrease	Yes	
123456789	03/01/2020 9:45 PM	Jeff	Cash Drawer	\$2,135.65	Final Deposit (EOD)		

In the grid, the following columns are available:

- **Deposit #:** the unique number of the record
- **Date/Time:** the date-time when the record was created
- **Created By:** the user who created the document
- **Amount:** the amount deposited
- **Reason:** the reason for deposit
- **Confirmed:** if the deposit is confirmed
- **Disposition:** if the record has been voided; if yes, displays the “Voided” label

On swiping left a row in the list, the following options display:

Deposit #	Date/Time	Created By	Source	Amount	Reason	Confirmed	Disposition
123456789	03/01/2020 11:44 AM	Ron	Safe	\$500.00	Safe float decrease	Yes	Voided
1/2020 PM	Jeff	Cash Drawer	\$2,135.65	Final Deposit (EOD)			Print Edit Void

- **Print:** opens the dialog to print the deposit
- **Edit:** opens the dialog to edit the record
- **Void:** voids the record

Sales Receipts: Payment

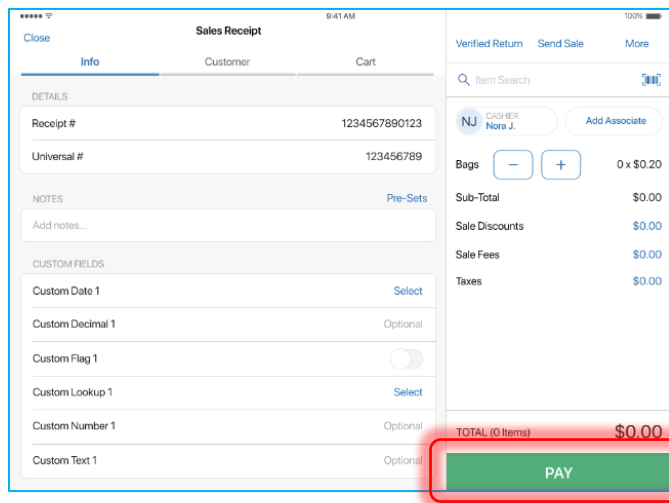
TWD-32267, TWD-32405, TWD-32538, TWD-32694

Build 6.21.140

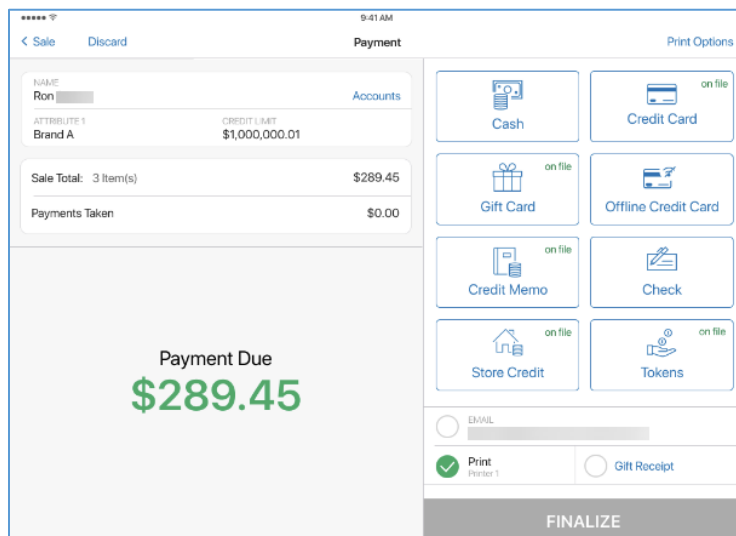
Payment types have been added to Sales Receipts in POS PRO.

To access the **Payment** area, first, a Sales Receipt must be created. To learn how to do that, see [New Sales Receipt area – Creating a Sales Receipt](#) of this Release Guide.

After adding a customer and sales items, tap **Pay** in the **Sales Receipt** dialog:



On tapping, the **Payment** area opens:



At the top-left, customer information may be available depending on your CHQ settings:

The screenshot shows a mobile payment interface. At the top, there are navigation options: '< Sale', 'Discard', 'Payment', and 'Print Options'. The main content is divided into two sections. On the left, a red box highlights the customer information fields: 'NAME: Ron', 'ATTRIBUTE 1: Brand A', and 'CREDIT LIMIT: \$1,000,000.01'. Below this, there is a summary section with 'Sale Total: 3 Item(s) \$289.45' and 'Payments Taken \$0.00'. On the right, there are several payment options, each with an icon and a label: 'Cash', 'Credit Card' (with 'on file' status), 'Gift Card' (with 'on file' status), and 'Offline Credit Card'. There are also icons for 'Credit Memo' and 'Tokens' at the bottom right.

NOTE: Configuration in CHQ

To configure the display of customer information in the **Payment** area, in CHQ, go to **settings > company settings > v6 App Designer > Point of Sale v6 > iPad > Home > Sales Receipt > Customer on Payment Form**.

Under the customer information, the following fields are available:

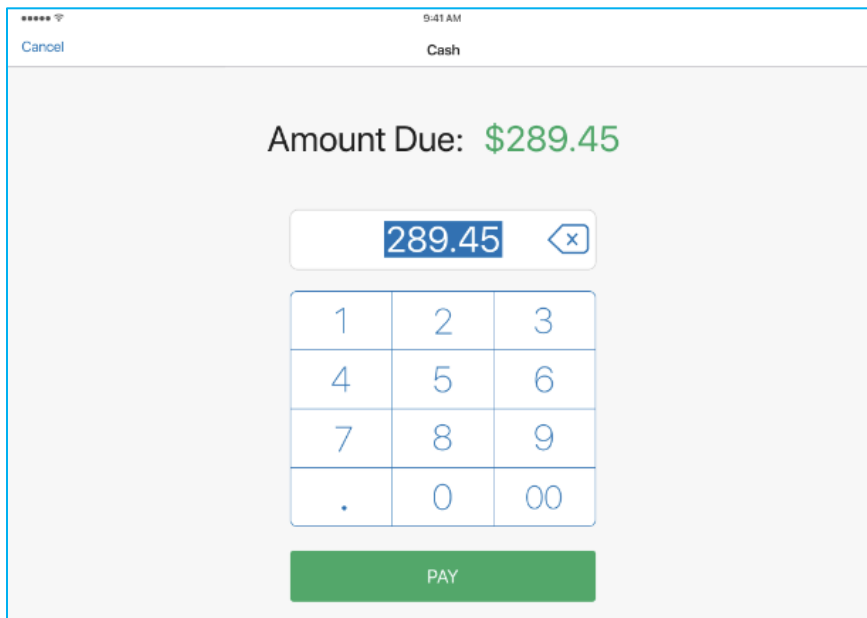
- **Sale Total:** the total due amount on the sale
- **Payments Taken:** the total of all payments taken
- **Change Given:** the total of the change given

On the right, available payment types display:

The screenshot shows a mobile payment interface. At the top, there are navigation options: '< Sale', 'Discard', 'Payment', and 'Print Options'. The main content is divided into two sections. On the left, there is a large green text display: 'Payment Due \$289.45'. Above this, there is a summary section with 'Sale Total: 3 Item(s) \$289.45' and 'Payments Taken \$0.00'. On the right, a red box highlights the payment options: 'Cash', 'Credit Card' (with 'on file' status), 'Gift Card' (with 'on file' status), 'Offline Credit Card', 'Credit Memo' (with 'on file' status), 'Check', 'Store Credit' (with 'on file' status), and 'Tokens' (with 'on file' status). At the bottom, there are options for 'EMAIL', 'Print Printer 1' (with a green checkmark), and 'Gift Receipt'. A large 'FINALIZE' button is at the very bottom.

Cash payment

On tapping **Cash** in the **Payment** area, the **Cash** dialog opens:



Amount Due: \$289.45

289.45

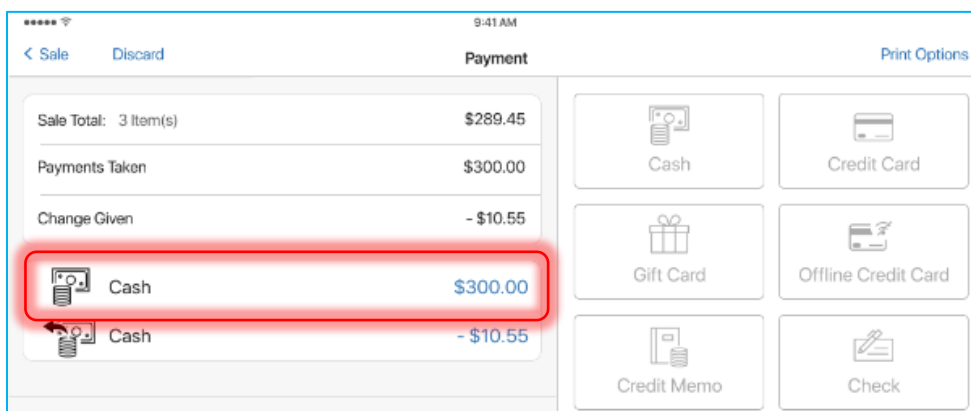
1	2	3
4	5	6
7	8	9
.	0	00

PAY

By default, the value in the amount field matches the **Amount Due**.

Once the amount the customer is paying is entered, tap **Pay**. On tapping, you are returned to the **Payment** area.

In **Payment**, the cash payment record now displays on the left:



Payment

Sale Total: 3 Item(s)	\$289.45
Payments Taken	\$300.00
Change Given	-\$10.55
Cash	\$300.00
Cash	-\$10.55

Cash

Credit Card

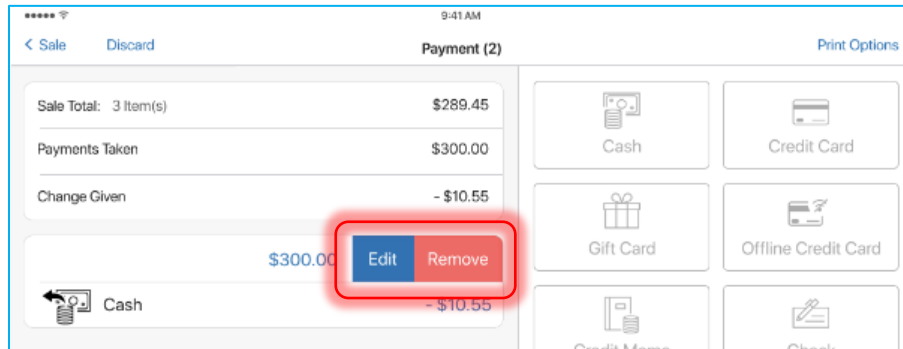
Gift Card

Offline Credit Card


Credit Memo

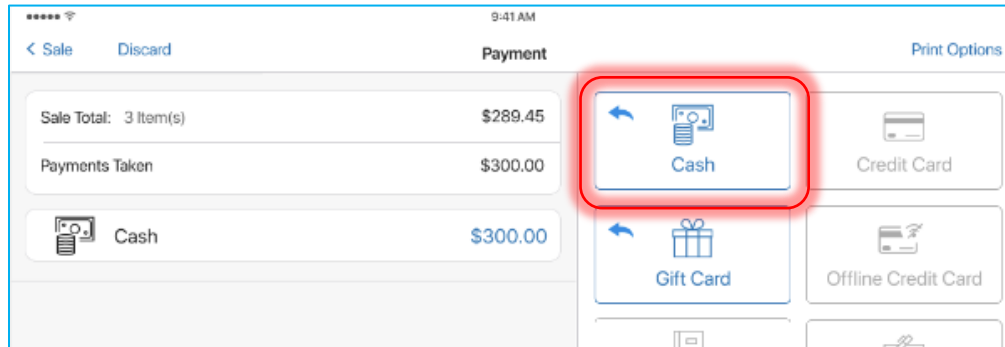
Check

To open it again for editing or to remove it, swipe the row with the record left and then tap the required option:



Giving change

The blue arrow  indicates a payment method that provides for the giving of change:



Tap the required payment method to enter the amount of change given.

NOTE:

If the **manual select payment method for change due before finalize** checkbox is cleared under **chq > settings > sales > sales documents**, then **Cash** will be default for any change due and the **Finalize** button will be enabled once the payment is captured.

Overpayment

If the appropriate setting is configured in CHQ, the user may not enter a value greater than allowed for a payment or change record.

If a greater amount is entered, the changes cannot be saved, and the "Maximum overpayment allowed is \$ X" notification displays where "X" is the defined amount.

NOTE: Configuration in CHQ

Configuration for overpayment is available under **chq > settings > sales > payment methods > (selected payment method)**.

To allow accepting more than due, select the **allow for positive amount** checkbox. Then, define the **max positive over-tender \$** or **max positive over-tender %** field. The “0” value allows for accepting unlimited amount.

To configure the same for change, define the **allow for negative amount**, **max negative over-tender \$**, and **max negative over-tender %** fields under the same location.

Offline Credit Card payment

On tapping **Offline Credit Card** in the **Payment** area, the **Offline Credit Card** dialog displays:

Cancel Offline Credit Card Done

WARNING!
THIS WILL NOT CAPTURE CARD PAYMENT
This method requires payment capture be performed by another device or process.

Card Type Select (Required)

Card Last 4 Enter Last 4

Authorization # Required

Custom Date 1 Select

Custom Decimal 1 None

Custom Text 1 None

Clear All

In the dialog, the following fields are available:

- **Card Type:** the type of credit card; on tapping Select, the dialog opens to select a card type; may be required depending on your settings
- **Card Last 4:** the last four digits of the credit card number; may be required depending on your settings
- **Authorization #:** the authorization code; may be required depending on your settings
- **Custom fields:** your custom fields

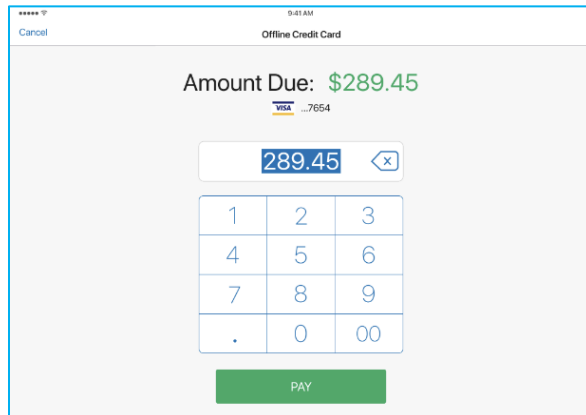
NOTE:

It is possible to configure if the card type, card last four digits and the authorization code are required in POS under **chq > settings > sales > payment methods**.

In **payment methods**, select **Offline Credit Card** and then click **location settings**. In **location settings**, select the required location and then configure the **require type for offline**, **require last 4 for offline**, and the **require authorization code for offline** fields.

To save changes, tap **Done** in the upper right corner.

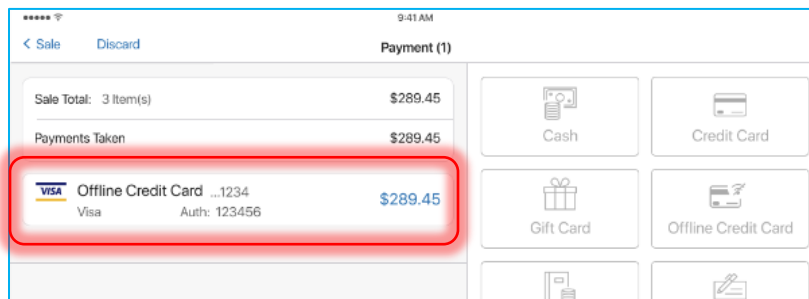
On tapping **Done**, the dialog opens to enter the amount the customer is paying:



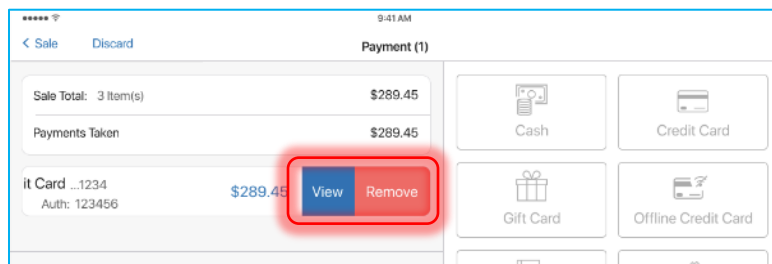
By default, the value in the amount field matches the **Amount Due**.

Once the amount the customer is paying is entered, tap **Pay**. On tapping, you are returned to the **Payment** area.

In **Payment**, the credit card payment record now displays on the left:



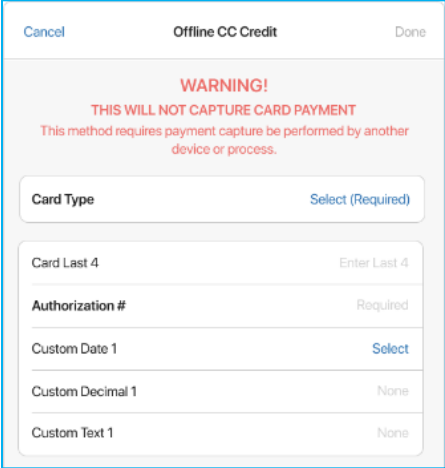
To view or remove the record, swipe it left and then select the required option:



Otherwise, tap **Finalize** in the bottom-right corner of the screen.

Offline Credit Card Credit payment

On tapping **Offline CC Credit** in the **Payment** area, the **Offline CC Credit** dialog displays:



Cancel Offline CC Credit Done

WARNING!
THIS WILL NOT CAPTURE CARD PAYMENT
This method requires payment capture be performed by another device or process.

Card Type Select (Required)

Card Last 4 Enter Last 4

Authorization # Required

Custom Date 1 Select

Custom Decimal 1 None

Custom Text 1 None

In the dialog, the following fields are available:

- **Card Type:** the type of credit card; on tapping Select, the dialog opens to select a card type; may be required depending on your settings
- **Card Last 4:** the last four digits of the credit card number; may be required depending on your settings
- **Authorization #:** the authorization code; may be required depending on your settings
- **Custom fields:** your custom fields

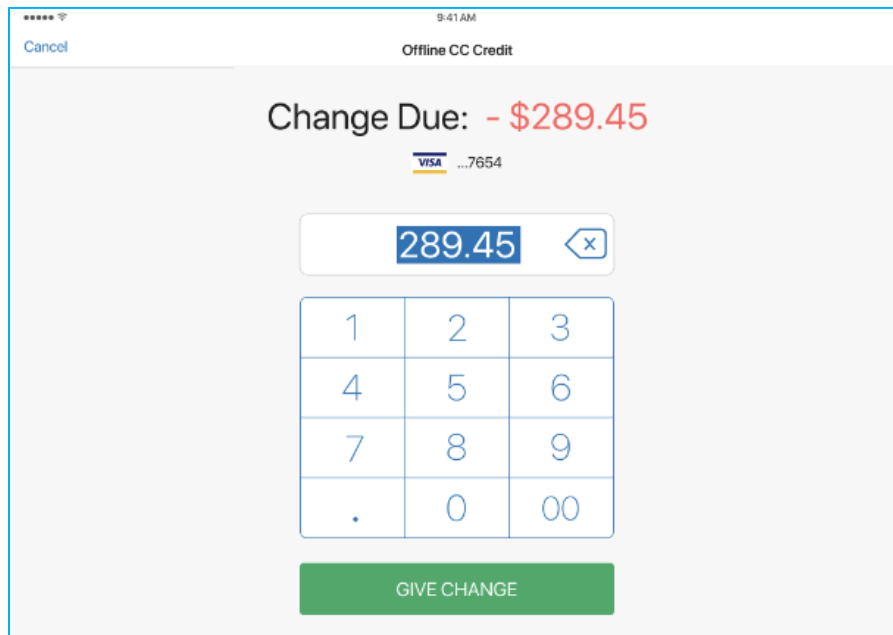
NOTE:

It is possible to configure if the card type, card last four digits and the authorization code are required in POS under **chq > settings > sales > payment methods**.

In **payment methods**, select **Offline Credit Card Credit** and then click **location settings**. In **location settings**, select the required location and then configure the **require type for offline**, **require last 4 for offline**, and the **require authorization code for offline** fields.

To save changes, tap **Done** in the upper right corner.

On tapping **Done**, the dialog opens to enter the credit amount:



Offline CC Credit

Change Due: - \$289.45

VISA ...7654

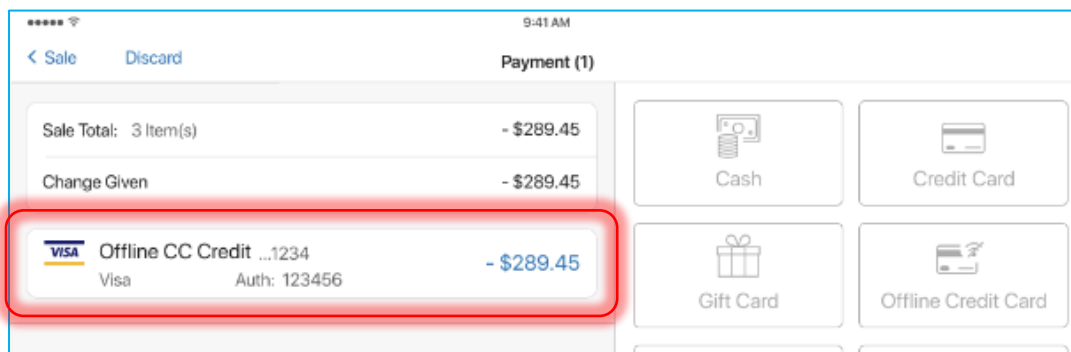
289.45

1	2	3
4	5	6
7	8	9
.	0	00

GIVE CHANGE

Once the required amount is entered, tap **Give Change**. On tapping, you are returned to the **Payment** area.

In **Payment**, the **Offline CC Credit** record now displays on the left:



Payment (1)

Sale Total: 3 Item(s)	- \$289.45
Change Given	- \$289.45
VISA Offline CC Credit ...1234	- \$289.45
Visa Auth: 123456	

Cash

Credit Card

Gift Card

Offline Credit Card

To view or remove the record, swipe it left and then select the required option.

Otherwise, tap **Finalize** in the bottom-right corner of the screen.

Configuring Sales Receipt printing

To configure settings for printing the current Sales Receipt, in the **Payment** area, tap **Print Options** in the upper right corner:

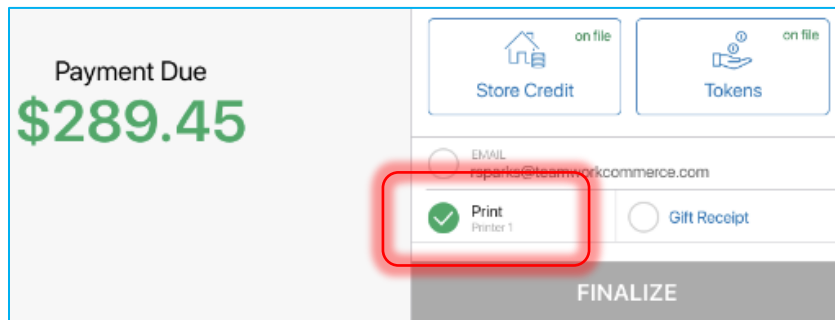
The screenshot shows the 'Payment' screen in a mobile application. At the top right, the 'Print Options' button is highlighted with a red box. The screen displays customer information for 'Ron' (Brand A) with a credit limit of \$1,000,000.01. The sale total is \$289.45 for 3 items, and payments taken are \$0.00. A large green text displays 'Payment Due \$289.45'. On the right side, there are several payment method options: Cash, Credit Card (on file), Gift Card (on file), Offline Credit Card, Credit Memo (on file), Check, Store Credit (on file), and Tokens (on file). At the bottom, there are radio buttons for 'Print Printer 1' (selected) and 'Gift Receipt', and a 'FINALIZE' button.

In the **Printing Options** dialog that opens, select **Sales Receipt** at the top:

The screenshot shows the 'Printing Options' dialog. At the top, there are 'Cancel' and 'Save' buttons. The 'Sales Receipt' option is selected and highlighted with a red box. Below it is a 'More...' link. Under the 'Store Receipt' section, there are several fields: 'Type' with a 'Print' button, 'Customer Email', 'Select Printer' (set to 'TM-T88iV'), 'Document Template' (set to 'Sales Receipt'), and 'Number of Copies' (set to '1').

Then, configure the fields in the dialog and tap **Save** in the upper right corner. On tapping **Save**, you are returned to the **Payment** area.

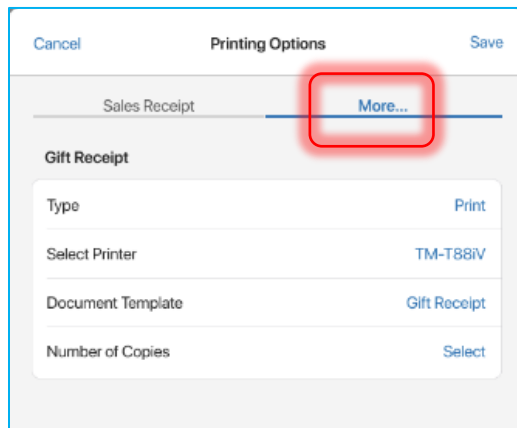
To print the Sales Receipt on finalizing, in **Payment**, select **Print** at the bottom-right:



Configuring Gift Receipt printing

To configure settings for printing a Gift Receipt, in the **Payment** area, tap **Print Options** in the upper right corner.

In the **Printing Options** dialog that opens, at the top, tap **More** and then **Gift Receipt**:

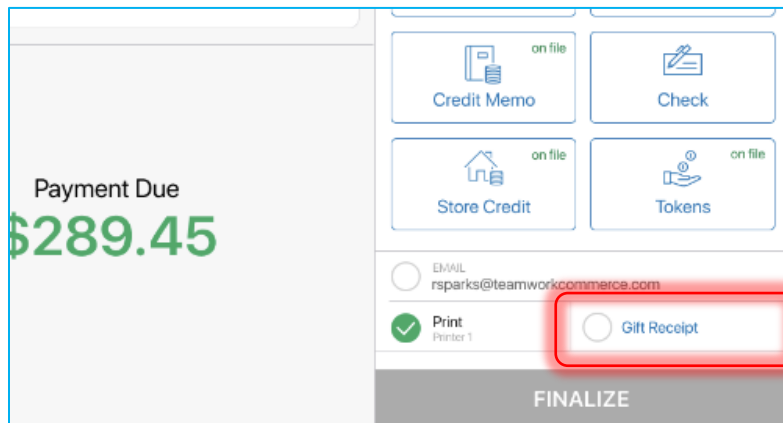


For **Gift Receipt**, the following fields are available for configuration:

- **Type**: the type of action; possible values are “None”, “Print”, and “Preview” (if multiple receipts are configured, a preview of each will be shown)
- **Select Printer**: the working printer
- **Document Template**: the template for the document
- **Number of Copies**: the number of Gift Receipts (see [Assigning items to Gift Receipts](#))

Once finished, tap **Save** in the upper right corner. On tapping, you are returned to the **Payment** area.

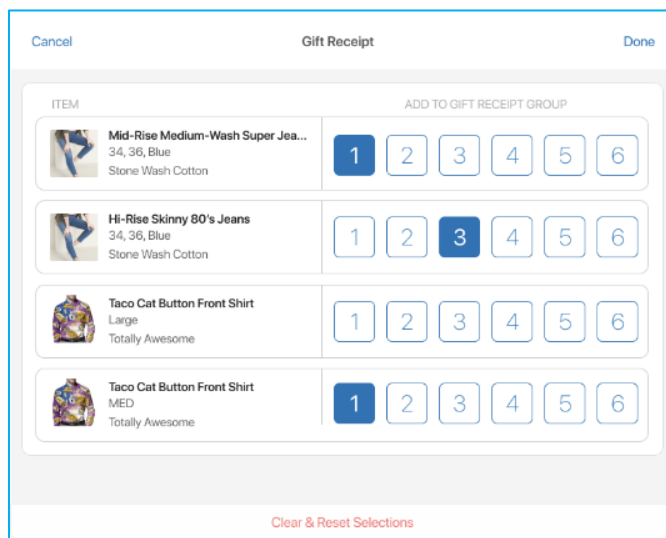
In **Payment**, to print the Gift Receipt(s) on finalizing, select **Gift Receipt** at the bottom-right:



Assigning items to Gift Receipts

To configure how many Gift Receipts will be printed, when in the **Printing Options** dialog, tap **Select** in the **Number of Copies** field.

On tapping, the **Gift Receipt** dialog opens:



It is possible to print up to 6 gift receipts against one Sales Receipt.

To indicate that the item should be printed on one of the Gift Receipts, next to that item's row, tap the number of the required Receipt. For example, on the screenshot above, the total of two Receipts will be printed ("1" and "3" are selected).

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

Using POS Pro in conjunction with DENSO UR-22 RFID Scanner

TWD-35579

Build 6.21.140

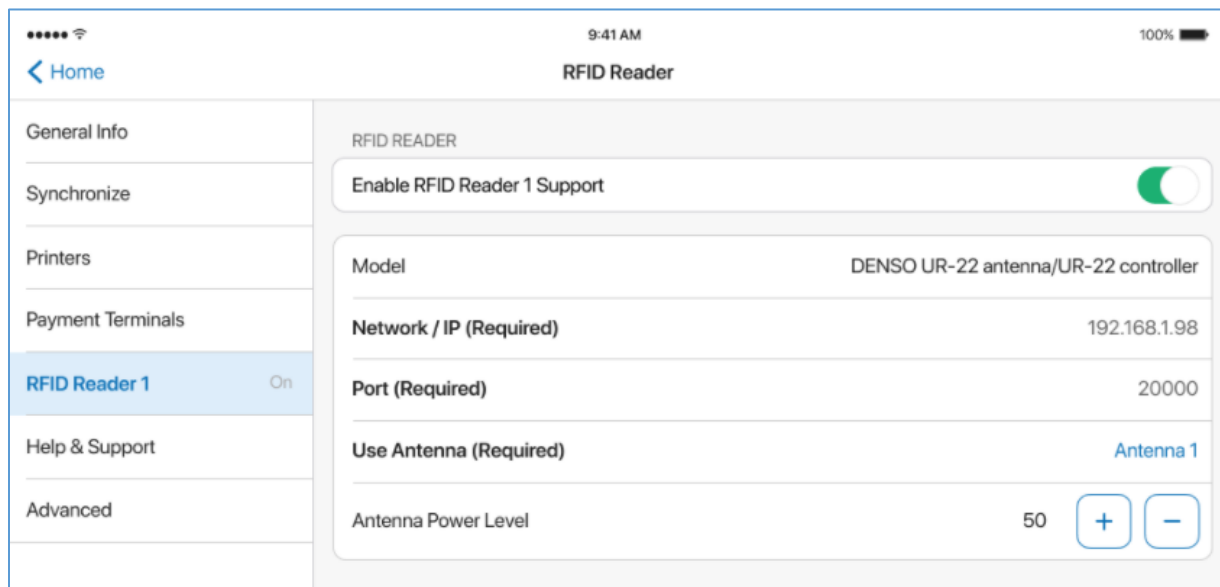
In 6.21.140, we've introduced the capability to use POS in conjunction with DENSO UR-22 RFID table scanner. This allows for automatically adding merchandise to Sales Receipt Cart without manually scanning each item's barcode.

NOTE:

For information on configurations required in CHQ, see the Settings for Denso UR-22 RFID Reader article in CHQ version 6.21 Release Guide.

RFID Reader settings in POS

To be able to use POS in conjunction with DENSO RFID scanner, it is required to configure connection settings. These settings are available in POS under **POS Settings > RFID Reader 1**:

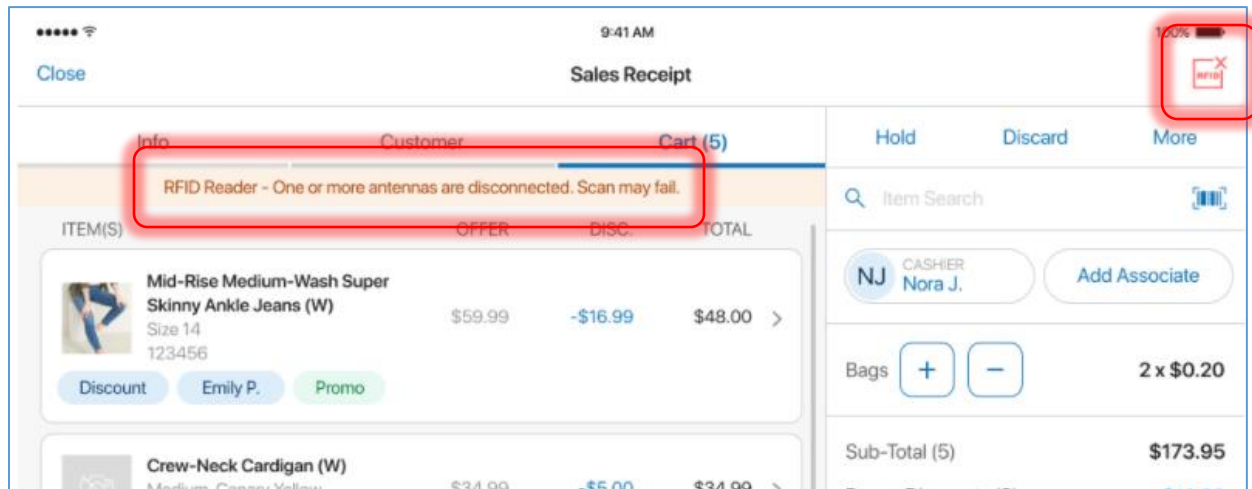


- **Enable RFID Reader 1 Support:** enable the switch to be able to configure the RFID reader settings in POS
- **Model:** the read-only field where the information on the RFID reader device displays
- **Network / IP:** specify the IP address of the reader
- **Port:** specify connection port
- **Use Antenna:** tap the value to the right of the field name to select which antenna to use ("Antenna 1", "Antenna 2", or "Use Both").
- **Antenna Power Level:** use + or - to configure the desired power level ("100" – full power, "1" – lowest power level)

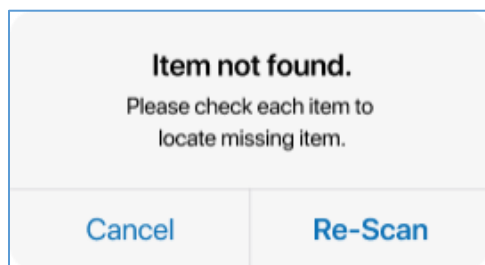
RFID-related notifications in POS PRO

RFID scanning is performed while the user is in the **Cart** tab under **Sales Receipts**.

During that time, if any of the two antennas got disconnected, the user will see the warning about potential RFID scan failure and the RFID status icon will display in red in the upper-right corner:



If an item's RFID has been successfully scanned but that item's EPC is not found in the device local database, the "Item not found. Please check each item to locate missing item" message displays:



IMPORTANT NOTE:

Please be advised that before being added to the cart, the item is scanned 3 times by default to ensure the correct scanning. The number of scans can be reconfigured in the **DENSO RFID** section under **chq > settings > company settings > general settings**.

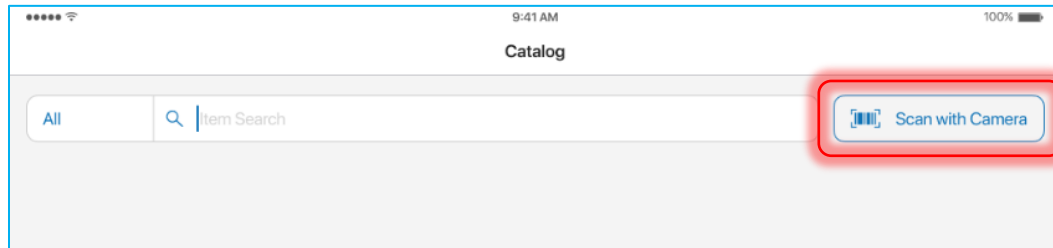
Updated scan camera UI

TWD-33661

Build 6.21.210

We've made the camera UI consistent across the POS Pro application.

Also, as a part of this update, in **Catalog**, the **Scan with Camera** button is now located outside of the **Item Search** field:



Updated logic for inventory labels display in POS

TWD-35178

Build 6.21.210

With this update, if nothing is specified for the inventory label in CHQ under **settings** > **inventory/catalog** > **inventory labels**, in POS, the corresponding fields will take their default names for that specific locale.

Updated required fields display

TWD-36518

Build 6.21.210

Starting from version 6.21.210 of the software, the required fields in POS Pro are marked by the asterisk "*" symbol:

Field Label*	Required
Editable Text Field Label*	
EDITABLE TEXT FIELD LABEL*	
Editable Text Field with entered text	
DATE FIELD LABEL*	
Select	
DATE FIELD LABEL (MONTH)*	
Select	
DATE FIELD LABEL (MM/DD)*	
Select	

The word "Required" is only used as a placeholder text in that case.

The required fields combined in a group now display as follows:

<u>Mobile (A)*</u>	<u>Phone 2 (A)*</u>
<u>Phone 3 (A)*</u>	<u>Phone 4 (A)*</u>
MOBILE (A)* (503) 222-1234	PHONE 2 (A)* (503) 123-4567
Phone 3 (A)*	Phone 4 (A)*
Mobile (A)*	Phone 2 (A)*
Phone 3 (A)*	Phone 4 (A)*

For example, in the screenshot above, all the fields belong to group A that is indicated next to each field in the round brackets. The asterisk “*” symbol after the group means that the field is required.

End of Day: Performing a take out from the drawer cash

TWD-35065

Build 6.21.210

Starting from 6.21.210, we’ve added the capability to perform a take out from the drawer cash during the End of Day process.

NOTE:

A Take Out record indicates that an amount of cash has been removed from the drawer.

Performing a take out is possible in the new **DRAWER CASH – Cash Handling** tab of the **End of Day** area:

Type	Remain Count	Remain Amount	Out Count	Out Amount
\$100 Bill	2	200.00	0	0.00
\$50 Bill	3	150.00	0	0.00
\$20 Bill	40	800.00	0	0.00
\$10 Bill	27	270.00	0	0.00
Total		\$1,531.50		\$0.00

In **DRAWER CASH – Cash Handling**, the following fields are available at the top (see the screenshot above):

- **Count:** the total counted amount in the safe from **DRAWER CASH – Count**
- **Float:** the total float amount according to the current plan from **DRAWER CASH – Float**
- **Take Out:** the amount to take out; if the value is non-zero, a **Take Out** record will be created on finalizing the Drawer Memo; if the denomination grid doesn't display below, the field is editable
- **Remaining Cash:** the value is calculated as **Float** and **Take Out** deducted from **Count**
- **Handle Remaining Cash as:** how the remaining cash should be handled

Below, in the **TAKE OUT** grid, the following columns are available:

Type	Remain Count	Remain Amount	Out Count	Out Amount
\$100 Bill	2	200.00	0	0.00
\$50 Bill	3	150.00	0	0.00
\$20 Bill	40	800.00	0	0.00
\$10 Bill	27	270.00	0	0.00
Total		\$1,531.50		\$0.00

- **Type:** a bill or coin denomination
- **Remain Count:** the current number of bills and coins in the drawer (float is deducted)
- **Remain Amount:** the current amount in the drawer (float is deducted)
- **Out Count:** the number of bills or coins to take out; editable; entering a value updates the corresponding **Out Amount** row
- **Out Amount:** the amount to take out; editable; entering a value updates the corresponding **Out Count** row

To clear all values entered in the denomination grid, tap **Clear 'Out' Values** below the grid.

To proceed to the next tab, tap **Next** in the bottom right corner.

On finalizing the Drawer Memo, a **Take Out** record will be created with the reason automatically set to "End of Day".

Changes under DRAWER CASH – Summary

Under **DRAWER CASH – Summary**, in the **Cash Management** section, a new **Cash Handling Take Out** field has been added. The field is read-only and displays the take-out amount from **DRAWER CASH – Cash Handling**.

Managing RFID item tags

TWD-36524

Build 6.21.210

When using POS in conjunction with the RFID scanner, we've added the capability to automatically deactivate or reactivate RFID item tags on finalizing a Sales Receipt.

Also, with this update, it's now possible to manually check and change the status of an RFID item tag.

NOTE:

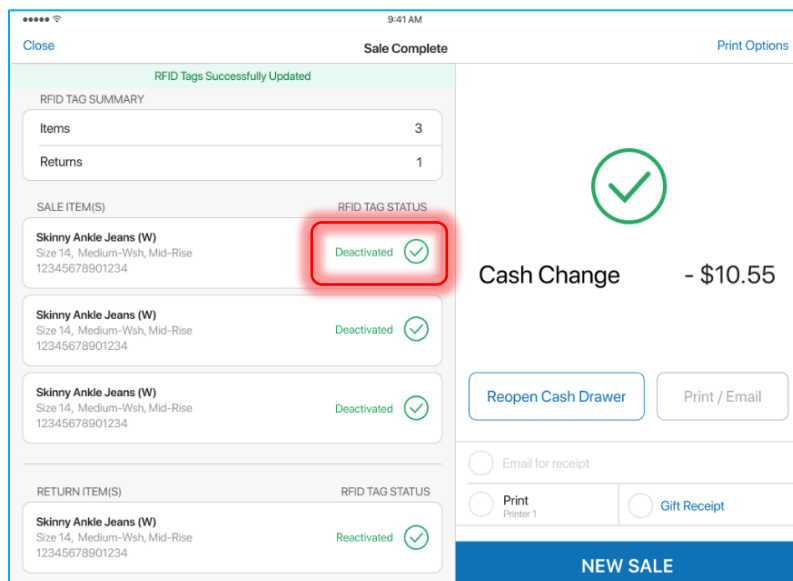
Please be advised that, for the feature to be available, an RFID scanner must be connected and enabled on your device under **POS Settings > RFID Reader 1**.

Automatically deactivating and reactivating RFID tags

When the associate finalizes a Sales Receipt, all RFID tags of the sale items will be automatically deactivated. Correspondingly, all RFID tags of the return items will be reactivated.

On tapping **Finalize** on a Sales Receipt, the **Sale Complete** area displays.

In the left-side panel, for each item listed under **SALE ITEM(S)** and **RETURN ITEMS(S)**, the status of the RFID tag displays:



For sale items, the following tag statuses are possible:

- **Deactivated:** the item tag has been deactivated
- **Active:** the item tag hasn't been deactivated; it may be required to either move the item to the RFID reader again or change the tag status manually
- **Missing:** the item needs to be moved to the RFID reader to deactivate the tag

For return items, the following tag statuses are possible:

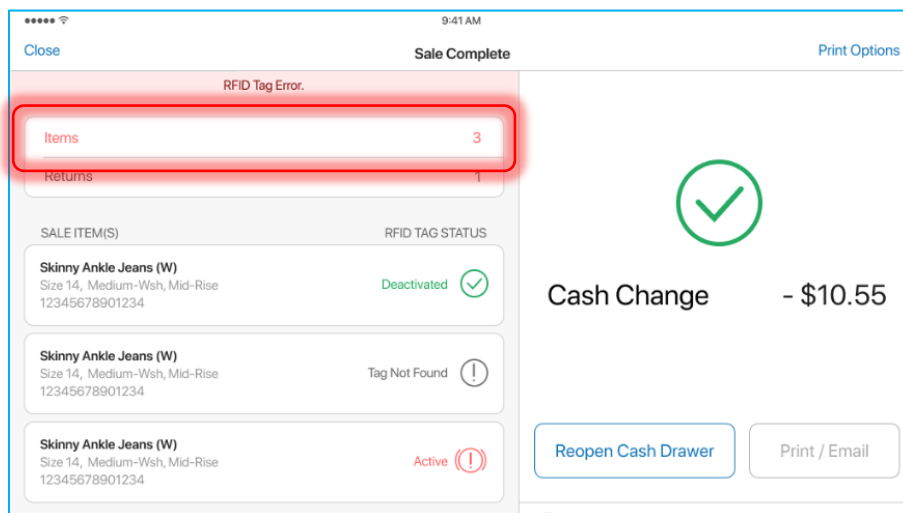
- **Reactivated:** the item tag has been reactivated
- **Not Active:** the item tag hasn't been reactivated; it may be required to either move the item to the RFID reader again or change the tag status manually
- **Missing:** the item needs to be moved to the RFID reader to reactivate the tag

When all item tags on the sale have been successfully updated, the green "RFID Tags Successfully Updated" message displays at the top.

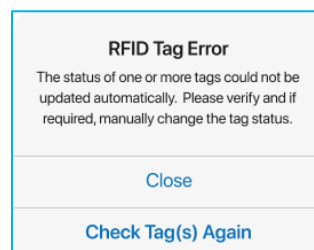
RFID tag error

If not all items have been successfully deactivated or reactivated on the Sales Receipt, the red "RFID Tag Error" message displays at the top.

Additionally, either the **Items** or **Returns** count below displays in red:



If there is an RFID tag error, and the user taps **New Sale** or **Close**, the **RFID Tag Error** dialog displays:

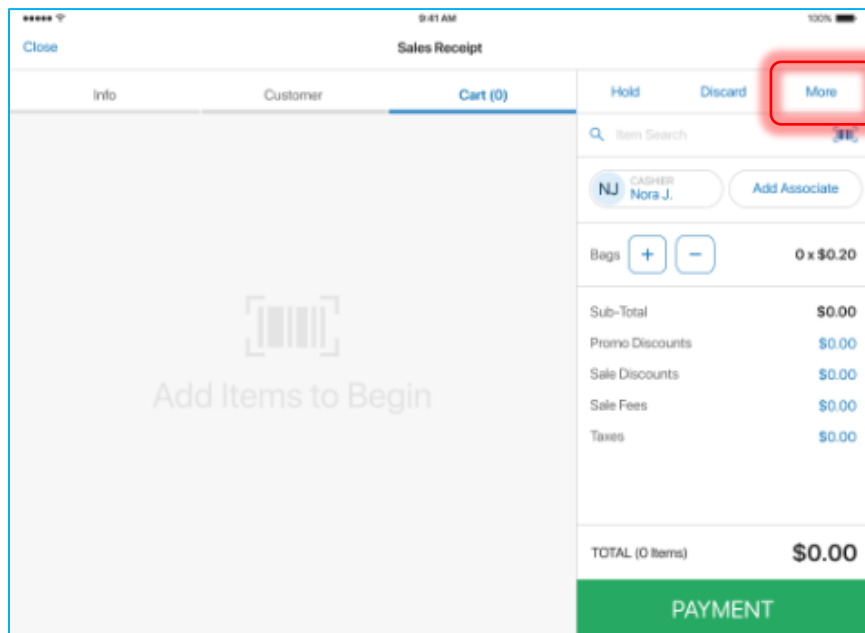


To manage items tags again in the **Sale Complete** area, tap **Check Tag(s) Again**.

To leave the tags as they are and close the area, tap either **Close** or **New Sale**.

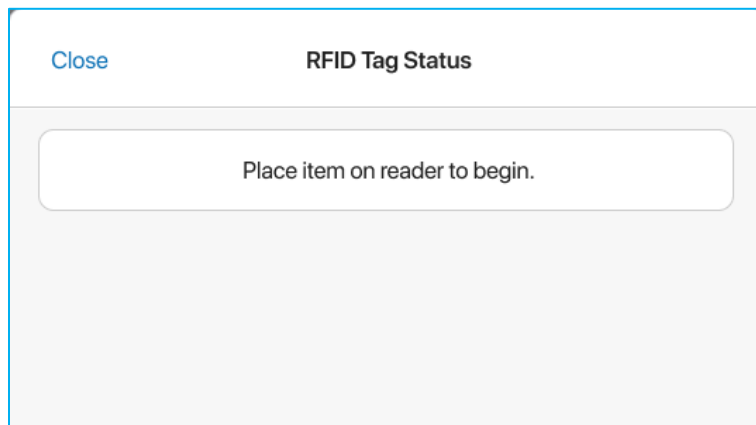
Manually changing the status of an RFID tag

To manually change the status of an item tag, in the **Sales Receipt** area, tap **More** in the upper right corner:



In the menu that opens, tap **RFID Tag Status**.

On tapping, the **RFID Tag Status** dialog opens:

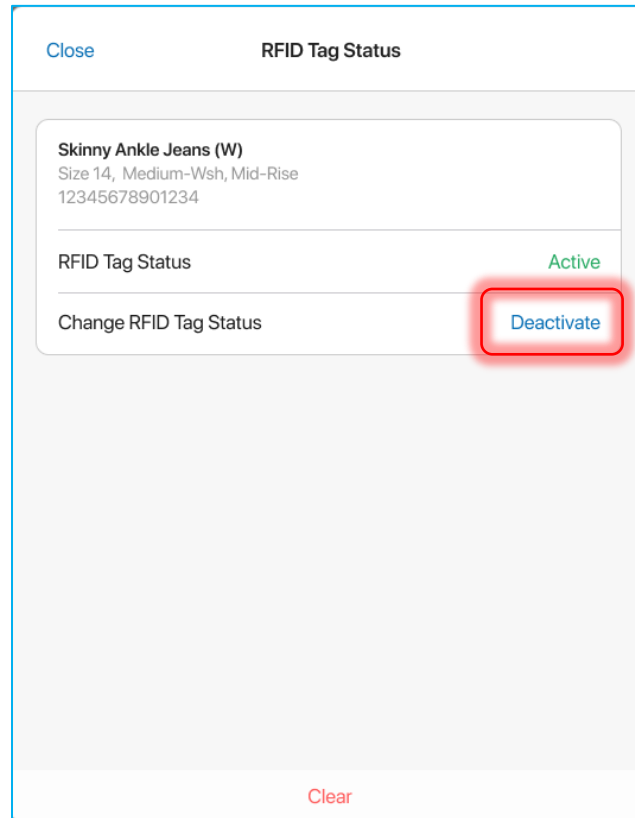


Place the required item on the RFID reader.

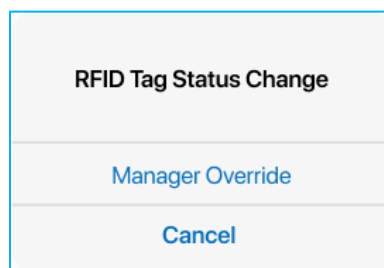
NOTE:

In the **RFID Tag Status** dialog, only one item at a time can be scanned.

Once the item is found, the item details display in the dialog. Depending on the current tag status, either **Deactivate** or **Activate** button will be available to change the tag status:



On tapping **Deactivate** or **Reactivate**, the **RFID Tag Status Change** dialog displays:



To enter the credentials of a user with the appropriate security rights, tap **Manager Override**.

Once the Manager Override is performed, the tag status will be updated.

Modification to managing RFID item tags

TWD-37808

Build 6.21.331

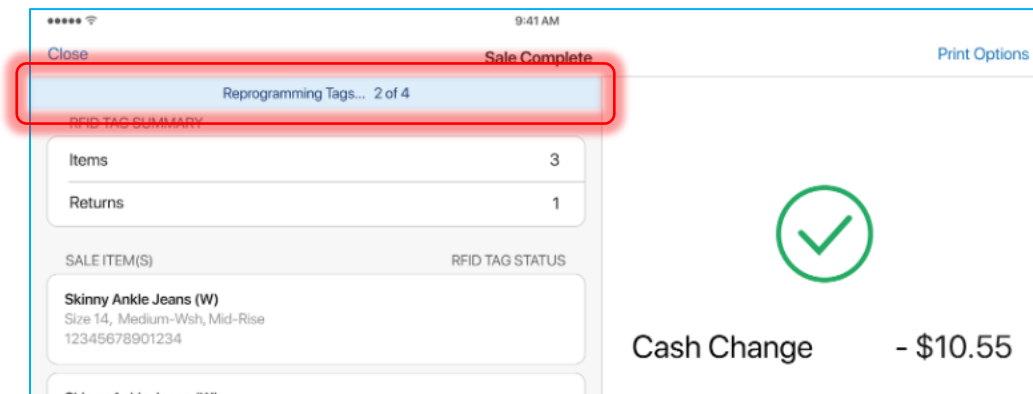
This feature is a modification to the [Managing RFID item tags](#) feature described in this Release Guide.

Updated RFID tag scanning

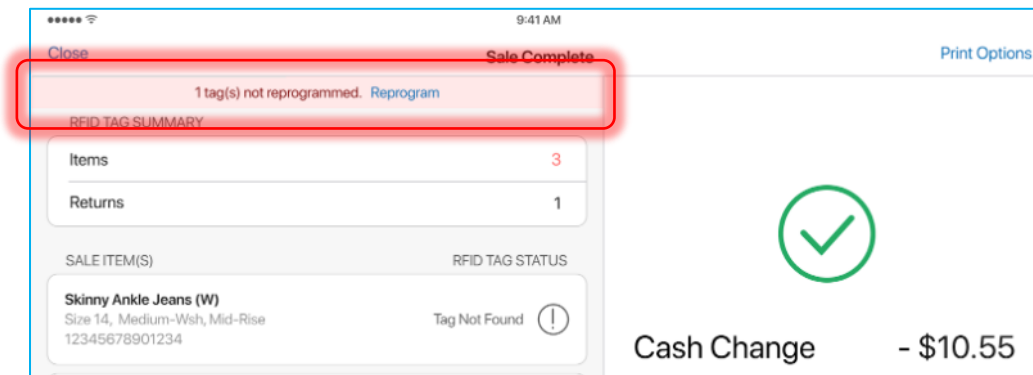
Now, in the **Sale Complete** area, RFID item tags can be scanned in cycles.

For example, if some of the item tags haven't been successfully deactivated or reactivated during the first cycle, the associate can scan them again.

When performing a cycle of reads, the progress bar displays at the top of the area:



If, after a cycle is complete, the status of some tags hasn't changed, the red notification displays at the top:



To scan the tags again, tap **Reprogram**.

Updated RFID tag statuses

We've updated some of the available RFID tag statuses.

Now, if an item tag hasn't been successfully deactivated, it displays with the **Not Deactivated** status.

If an item tag hasn't been successfully reactivated, it displays with the **Not Reactivated** status.

NOTE:

If the tag has the "Not Deactivated" or "Not Reactivated" status, it may be required to either move the item to the RFID reader again or change the tag status manually.

If an item has been scanned but the tag cannot be reprogrammed, it displays with the **RFID Tag Locked** status.

Sales Receipt: Adding items with deactivated RFID tags as an Open Return

TWD-37807

Build 6.21.247

Now, when the associate scans an item with a deactivated RFID tag to add it to the Sales Receipt, that item is automatically added as an **Open Return**.

An **Open Return** occurs when a customer returns merchandise without the original Sales Receipt.

The return reason is assigned automatically and will be the first reason in the list of available ones.

NOTE: CHQ configuration

The list of available return reasons can be defined under **chq > settings > sales > return reasons**.

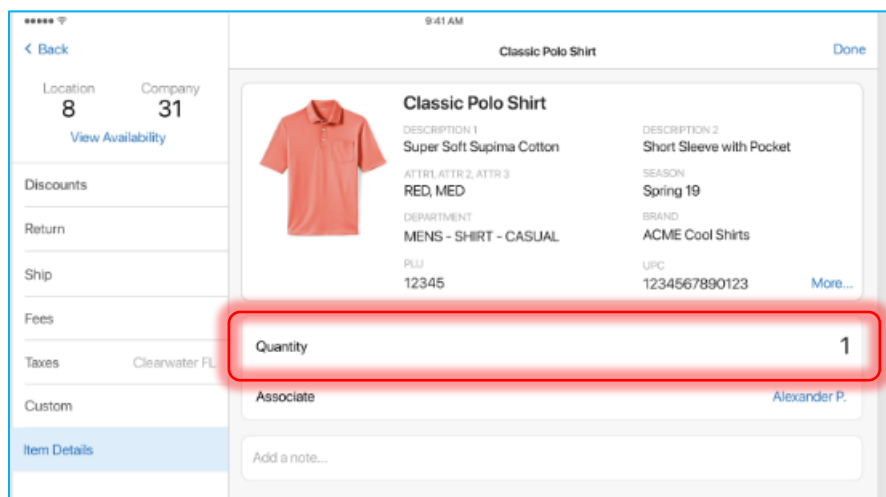
Sales Receipt: Non-editable item quantities when the RFID reader is enabled

TWD-38195

Build 6.21.331

Starting from version 6.21.331, if the RFID reader is enabled in POS under **Settings > RFID Reader**, it is not possible to manually change item quantities on a Sales Receipt.

If the RFID reader is enabled and the user opens the item edit dialog in the **Sales Receipt** area, the **Quantity** field for that item will be read-only:



End of Day: New fields under SAFE CASH – Closing Count

TWD-38069

Build 6.21.331

We've made updates to the POS **Drawer Memo > End of Day > SAFE CASH** area to improve handling of remaining cash in the safe.

Under **SAFE CASH – Closing Count**, the following fields have been added:

- **Pending Move to Safe**
- **Next Safe Float**
- **Deposit Amount**

CLOSING	
Expected Amount	\$1,000.00
Counted Amount	\$1,000.00
Over / Short	\$0.00
Pending Move to Safe	\$400.00
Next Safe Float	\$1,400.00

DEPOSIT	
Deposit Amount	\$0.00

The **Pending Move to Safe** field displays the amount to be moved to the safe on finalizing the Drawer Memo. The value in the field is defined by the **Move to Safe** value under **DRAWER CASH – Cash Handling**.

The **Next Safe Float** field displays the resulting float amount for the next Drawer Memo.

The **Deposit Amount** field displays the amount to be deposited. The value is calculated as the difference between **Counted Amount** and **Next Safe Float**.

If the value in the field is greater than zero, a **Deposit** record will be created on finalizing the Drawer Memo.

Also, the same fields described above have been added under **SAFE CASH – Summary**.

Compatibility with CHQ 6.21

TWD-38099

Build 6.21.331

POS Pro 6.20.250 is now compatible with CHQ 6.21.

Issue resolutions

RFID Antenna Power Level changes not saved

TWD-37822

Build 6.21.247

Prior to 6.21.247, when changing the **Antenna Power Level** value under **POS Settings > RFID Reader 1** and then returning to **POS Home Screen**, the changes wouldn't be saved.

The issue has been fixed. Now, the new value is saved as expected.

Drawer Memo: Cash movements not recorded against Cash in Drawer and Cash in Safe

TWD-37386

Build 6.21.247

Prior to 6.21.247, when a **Move to Safe** or a **Move to Drawer** record would be created against a Drawer Memo, the corresponding amounts would not be subtracted from the **Cash in Drawer** or **Cash in Safe** amounts.

Now, the cash amounts are subtracted and relocated as expected.

Drawer Memo: Start and last edit time displays incorrectly

TWD-37836

Build 6.21.247

We've fixed an issue where the start and last edit time of a Drawer Memo would display incorrectly.

When opening the active Drawer Memo by tapping **View** on **POS Home Screen**, the time in the **Last Edit** and **Start of Day** fields would display in an incorrect time zone.

Now, the time in the **Last Edit** and **Start of Day** fields displays in the device local time zone, as expected.

End of Day: Entering decimal numbers for Float Amount

TWD-37743

Build 6.21.247

Prior to 6.21.247, the user could not enter decimal numbers in the **Float Amount** column under **Drawer Memo > End of Day > Float** both for **Drawer Cash** and **Safe Cash**.

The issue has been fixed. Now, it is possible to enter decimal numbers to define cents, for example, "99.9".

Drawer Memo: Values less than “1.00” not displayed for the opening amount

TWD-37781

Build 6.21.247

We’ve fixed the issue where an amount less than “1.00” would not display in the **Amount** column under **Drawer Memo > Start of Day > Opening**.

Starting from this version, values less than “1.00” are displayed when defined for the opening amount.

Sales Receipt: Global discount incorrect application

TWD-37763

Build 6.21.247

Issue

In the **Sales Receipt** area, if an item would be added after a global discount was applied, the discount would not affect that item.

Resolution

The issue has been fixed. Now, if a global discount is added to the Sales Receipt, the totals are recalculated for all the sale items.

Buttons working incorrectly in the Start of Day incomplete dialog

TWD-37151

Build 6.21.247

Issue

In the **Drawer Memo** area, when manually changing the Memo status from “Inactive” to “Active” and the **Start of Day incomplete** dialog appears, the **Open Start of Day** and **Cancel** buttons of that dialog would work incorrectly.

Resolution

The issue has been fixed. Now, both buttons work as expected.

Changing the global fee amount doesn't update the Sales Receipt total

TWD-37770

Build 6.21.247

Issue

When the user would apply a global fee to a Sales Receipt and then edit the fee amount, the last change would not reflect in the Receipt **TOTAL** field.

Resolution

Now, if a global fee amount has been changed, the Sales Receipt total amount is updated as well.

Drawer Memo: Deposit Slip not printed automatically

TWD-38020

Build 6.21.283

Issue

Prior to version 6.21.283, when creating a deposit record against a Drawer Memo and turning on the **Print Deposit Slip on Done** switch in the **Deposit** dialog, the Deposit Slip wouldn't automatically print on closing the dialog.

Resolution

The issue has been fixed. Now, when the **Print Deposit Slip on Done** switch is turned on, the Deposit Slip is automatically printed on closing the **Deposit** dialog.

Drawer Memo: The Deposit Slip print preview not opening

TWD-38018

Build 6.21.283

Issue

When creating a deposit record against a Drawer Memo, and the following two conditions are observed:

- in the **Printing Options** dialog for the Deposit Slip, **Deposit Slip type** is set to "Print Preview"
- in the **Deposit** dialog, the **Print Deposit Slip on Done** switch is turned on,

on closing the **Deposit** dialog, the print preview dialog wouldn't open as expected.

Resolution

Now, when the described conditions are observed, on tapping **Done** in the **Deposit** dialog, the print preview dialog for the **Deposit Slip** opens.

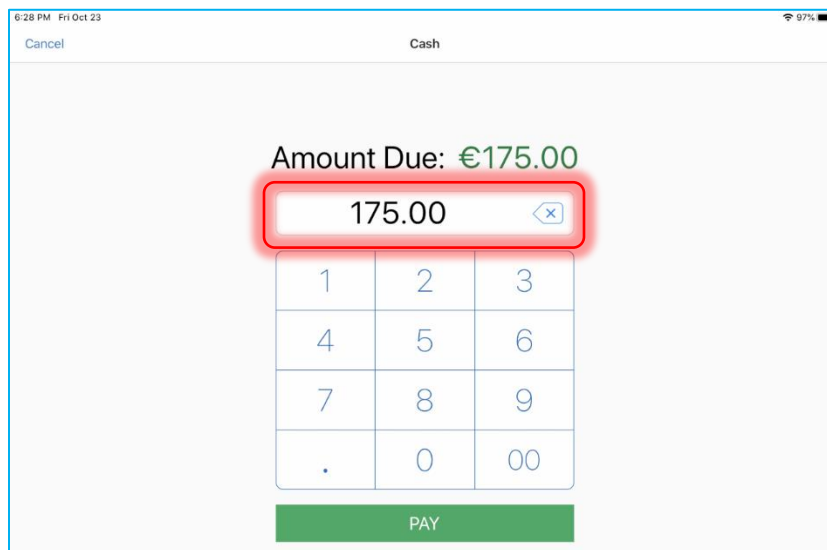
Sales Receipt payment: The Amount Due field population issue

DS-1262

Build 6.21.283

We've fixed the issue where the **suggested amt. when positive** and the **suggested amt. when negative** settings under **chq > settings > sales > payment methods > click to select cash > location settings > (selected location)** would not be respected in POS.

When the **suggested amt. when positive** and the **suggested amt. when negative** checkboxes were cleared in CHQ, in POS, the **Amount Due** field in the payment dialog would still be automatically populated with the Sales Receipt total:



Now, when the **suggested amt. when positive** and the **suggested amt. when negative** checkboxes are cleared in CHQ, the **Amount Due** field in POS is not auto-populated.

Finalized Sales Receipts are not posted to CHQ

DS-1236

Build 6.21.331

We've fixed the issue where Sales Receipts that were finalized in POS wouldn't automatically post to CHQ.

Sales Receipt: Incorrect display of payment methods

DS-1261

Build 6.21.331

Prior to 6.21.331, Sales Receipt payment methods that were configured to be invisible for a certain store location could still display for that location.

The issue has been fixed. Now, payment methods configured as invisible do not display in the Sales Receipt **Payment** area.

Sales Receipt: Sell Items value incorrect calculation

DS-1264

Build 6.21.331

We've corrected the calculation of the **Sell Items** total value in the **Sales Receipt** area.

Now, as expected, VAT taxes are included when calculating the value.

Sales Receipt: Incorrect display of item discount amount

DS-1264

Build 6.21.331

Prior to 6.21.331, in the **Cart** tab of the **Sales Receipt** area, the item's **DISC.** amount would display without the minus sign.

Now, the discount amount displays with the minus sign, as expected.

Sales Receipt: Discount reasons list issue

DS-1270

Build 6.21.331

Issue

In POS, discount reasons in the **Sales Receipt** item edit dialog wouldn't be listed in the order configured in CHQ.

Resolution

The issue has been fixed. Now, the list of discount reasons in POS respects the CHQ list order setting.

Drawer Memo: The Last Edit field not updated

DS-1266

Build 6.21.331

We've fixed the issue where the **Last Edit** field in the **Drawer Memo** area wouldn't update when any cash management record was created against that Memo.

Now, the **Last Edit** field is updated as expected.

Sales Receipt: The Return tab of the item edit dialog not closing

DS-1288

Build 6.21.331

Issue

When the user would open the **Return** tab of the Sales Receipt item edit dialog, sometimes it wasn't possible to close the tab without any changes made.

Resolution

Now, the user can move from the **Return** tab without any issues.

Start of Day: The Count values less than "1.00" display as "0"

DS-1290

Build 6.21.331

Prior to 6.21.331, decimal values less than "1.00" would display as "0" when entered in the **Count** column of the denomination grid under **Drawer Memo > Start of Day > Opening Count**.

Now, values less than "1.00" display correctly in the denomination grids of the **Start of Day** area.

Drawer Memo: Keyboard covering Notes in the Deposit dialog

DS-1269

Build 6.21.331

We've fixed the issue where, when creating a new deposit record in the **Deposit** dialog, the virtual keyboard would cover the **Notes** field.

Start of Day and End of Day: Issue with Amount values display

DS-1269

Build 6.21.331

Prior to 6.21.331, in the **Start of Day** and **End of Day** areas of POS, the **Amount** values in the denomination grids would ignore the format settings (for example, display as "0" when configured to display as "0.00").

The issue has been fixed. Now, the values display as configured.

The “Start of Day” and “End of Day” reasons available for selection

DS-1286

Build 6.21.331

Prior to 6.21.331, the “Start of Day” and “End of Day” reasons that are applied automatically would be available for selection when creating a Take Out record.

Now, the “Start of Day” and “End of Day” reasons are not available for manual selection, as expected.

Sales Receipt: The Ext Total value incorrect calculation

DS-1304

Build 6.21.331

We’ve corrected the calculation of the **Ext Total** value that displays for each item in the **Cart** tab of a Sales Receipt.

Now, the **Ext Total** value calculation includes VAT taxes.

Drawer Memo: Incorrect calculation of Sales, Returns and Net Sales

DS-1305

Build 6.21.331

Issue

The Drawer Memo **Sales**, **Returns**, and **Net Sales** fields would display incorrect values based on the **TOTAL** amounts of the associated Sales Receipts.

Resolution

Now, as expected, the **Sales**, **Returns**, and **Net Sales** fields display values based on the amounts from the Sales Receipt item lines.

Drawer Memo: Inconsistent time format in the Last Edit and Start of Day fields

DS-1309

Build 6.21.331

Prior to 6.21.331, the time in the **Last Edit** and **Start of Day** fields of a Drawer Memo could display in different formats.

Now, the time format in the **Last Edit** and **Start of Day** fields is consistent.

End of Day: The Float Exceeds Count warning appearing

DS-1310

Build 6.21.331

Issue

In the **End of Day** area, under **SAFE CASH – Closing Count**, the “Float Exceeds Count” warning would appear when the **Next Safe Float** value didn’t actually exceed the sum of the **Counted Amount** and **Pending Move to Safe** values.

Resolution

The issue has been fixed. Now, the warning appears only when the **Next Safe Float** value exceeds the sum of the **Counted Amount** and **Pending Move to Safe** values.

Sales Receipt: The VAT Included value incorrect calculation

DS-1312

Build 6.21.331

We’ve fixed the issue where return item taxes wouldn’t be included in the calculation of the **VAT Included** value in a Sales Receipt.

Drawer Memo: The Deposit Confirmed switch cannot be turned off

DS-1313

Build 6.21.331

Prior to 6.21.331, when creating a **Deposit** record against a Drawer Memo, the **Deposit Confirmed** switch couldn’t be turned off once enabled.

Now, the **Deposit Confirmed** switch can be turned off without any issues.

Epilogue

This release guide was published on **November 6, 2020** by Teamwork Commerce.

Mobile apps are procured via the app store, Meraki, or otherwise provided by a Teamwork representative. This manual provides documentation on new features and product updates to the existing Mobile software.

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