

Oracle® Retail MICROS Retail-J

POS User Guide

Release 12.1

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Release	12.1

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Note: The rebranding for the latest version of this documentation set is in development as part of post MICROS acquisition activities. References to former MICROS product names may exist throughout this existing documentation set.

1.0 Getting Started with POS

1.1 Signing On

The POS is configured by a system administrator in the BackOffice. Screens for any given installation may therefore differ from those shown in this document. Certain commands are only available under specific menus.

Normally, for a right handed user, there are buttons on the right side of the display which indicate the options available. These are selected using a touch-screen, track-pad or mouse.

At startup, the terminal displays the *Sign On* menu (see “Sign On Menu” on page 65). You must enter an operator ID and, optionally, a password. After a successful sign on, the *Sales* menu is displayed (see “Sale Menu” on page 70).

In this user guide, the word *transaction* refers to an entry of line items, the selling process, and totalling followed by a tendering process. Within, or at the end of, a transaction there is an associated printing process.

When you have completed the selling process, the *Tender* menu is displayed (see “Tender Menu” on page 24). This enables you to enter a variety of tenders, as required. The transaction is complete when the balance reaches zero or change is due back to the customer. A receipt is normally printed at this stage.

Each screen generally consists of three parts:

- A field into which you can enter details as instructed, e.g. product code, price, quantity etc.
- Buttons on the right or left side of the screen which identify the options available to you at any particular stage of the operation.
- A display area, which indicates the progress to date, or a list of options from which you must select one.
- A status line displaying the branch number, terminal number, transaction number, operator name and current date and time respectively.

If you enter invalid data, any error messages are clearly displayed in red on the applicable screen.

1.2 Roles and Users

1.2.1 Roles

Access to functionality is based on roles. That is, you can only access a function if you have the appropriate role assigned to your user in the BackOffice. For certain functions, such as promotions, refunds and voids, a manager role may be required. The access level provided for a specific role is also determined in the BackOffice.

1.2.2 Users

The baseline configuration, which may vary from your configuration, includes the following POS users:

- POS Operator
- POS Supervisor

- Store Manager
- System Administrator

1.3 Screen Layouts

The POS can be configured to be displayed in various different ways depending on the type of transactions and display in use. All of the displays include a status line, receipt display, input area, prompt and configurable buttons.

The POS runs on touch screens, self checkouts, tablets, hand held terminals and mobile devices in a thin or thick configuration and on a variety of browsers. Both operator and customer displays offer highly flexible configuration in both function and appearance.

The following example also includes a 'hot key' button in the top left of the screen which is used to switch between the POS, thin client and Browser applications:

Branch: 000290 Terminal: 0004 Transaction: 0150 Paul Duse 24/11/09 11:49

Single-breasted 2pcs £149.00
BALANCE DUE £149.00
No. of Items 1

Please enter the cash paid by the customer

Total: £149.00

7 8 9 CLR
4 5 6
1 2 3 ENTER
0 .

OK
£140.00
£150.00
£160.00
Cancel

1.3.1 Java

1.3.1.1 AWT 1

Branch: 080066 Terminal: 0001 Transaction: 0503 Mike Carr

Single-breasted 2pcs £149.00
BALANCE DUE £149.00

*Sell Item
*Returns
*Other
*Voids
*Override
*Administration
*Total

Single-breasted 2pcs
Please enter/scan a PLU.

Total: £149.00
04 April 2002 14:21:48

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

1.3.1.2 AWT 2

After Dinner Delights
Please enter/scan a PLU.

Eden Gift Set £16.95
965g Continental £27.00
After Dinner Delights £13.00

Total: £56.95

Sell Item	Administration	7	8	9	Continental	Party Treats
Returns	Voids	4	5	6	Eden	Total
Price Override		1	2	3	After Dinner Delights	Store
Allowance	Print Receipt	Enter	0	.	CLR	Concessions
						Sign off

Branch: 000001 Terminal: 0001 Transaction: 0036 Mike Carr 12/03/03 15:22

1.3.1.3 AWT 2 - Alternate

1350g Continental in Gold Please enter/scan a PLU.	Eden Gift Set	£16.95
	965g Continental	£27.00
	After Dinner Delight	£13.00
	1350g Continental in Gold	£37.00
Total:		£93.95

Back

Branch: 000001 Terminal: 0001 Transaction: 0036 Mike Carr 12/03/03 15:24

1.3.1.4 AWT 4 - Mobile POS and Palm HHT

Please enter your ID and sign on.			Sign on
7	8	9	
4	5	6	
1	2	3	
0	.	CLR	

Eden Gift Set Please enter/scan a PLU.	Sell Item
	Return Item
Eden Gift Se 16.95	Other
550g Chocola 4.95	
Chocolate Bo 20.25	
Eden Gift Se 16.95	
BALANCE DUE 42.15	Voids
	Show Pad
	Total

1.3.1.5 Sculptured POS

1.3.2 Servlet POS (TPOS)

This is run via a browser. The attributes of browser POS are:

- fast
- uses style sheets for flexibility
- can work against local, store BackOffice or estate manager servers
- enables consistent look-and-feel across estate
- enables other applications to be delivered through a common user interface

User: Paul	Company: 1	Branch: 000001	Terminal: 0001	Transaction: 0006	
Eden Gift Set Please enter/scan a PLU.					
<input type="text"/>					
Mr Chris Sidell 34 Manhattan Drive Cambridge CB4 1JL 07976 724730					
Item Code	Description	Quantity	Value		
414	Eden Gift Set	1	£16.95		
TOTAL		1	£16.95		

Returns

More

Voids

Overrides

Administration

Total

1.4 Sales

You can start selling items as soon as the sign on process has been completed successfully, and the terminal is ready to accept sales. The functions and restrictions for each product are configured in the BackOffice.

From this screen you can perform all of the actions described in the following sections. When the required action has been completed you are returned to this screen.

For further information see “Sale Menu” on page 70.

1.5 Airport Sales

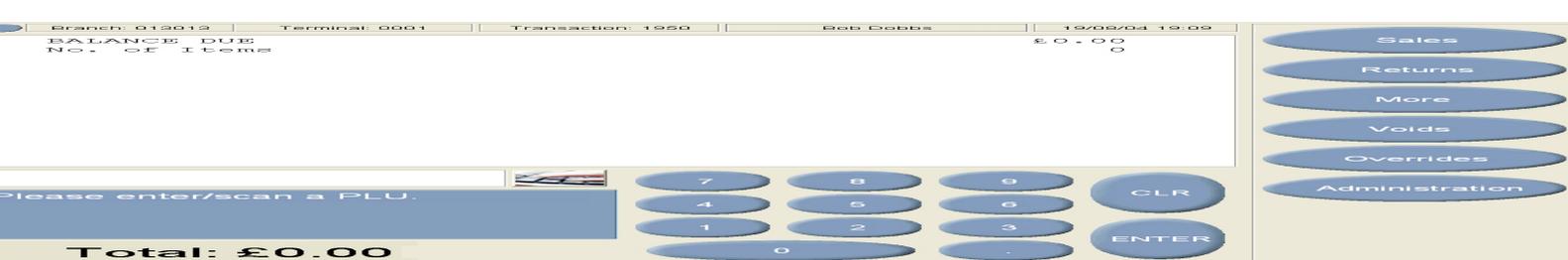
The details of each airport are configured in the BackOffice. The sales can be made associated with an airport or airport staff. In order to perform airport sales, the location must be configured in the BackOffice.

For further information see “Sale Menu” on page 70 and “Flight Menu” on page 64.

1.6 Tendering

The tenders supported by Torex Retail POS are:

- Cash
- Cheque
 - supports cheque printing
 - cheque account number reading
 - Transax (APACS30 authorisation)
- Card
 - validation against IIN ranges, floor limits etc.
 - APACS30 authorisation



- prints voucher on receipt printer
- Customer Account Card
 - validates card and performs authorisation
 - reads name and address from Customer Account details
 - verifies current credit limit and balance
- Foreign Currency
- Euro
 - Euro triangulation
- Credit Note
 - print credit note with serial number
 - redeem by scanning or manual entry
 - verifies serial number was issued and has not been re-used
- Gift Voucher
 - configure denominations
 - redeem by scanning or manual entry
 - verifies serial number was issued and has not been re-used
- Loyalty Points
 - pay with accumulated loyalty points at a configured exchange rate
 - authorise loyalty balance
- Rechargeable Vouchers
 - issue with an initial amount and recharge
 - track serial number
- Deposit Account
 - accumulate deposits against customer account
- Employee Account
 - validates card and performs authorisation
 - reads name and address from Customer Account details
 - verifies current credit limit and balance
- Local Account
 - validates card and performs authorisation

- reads name and address from Customer Account details
- verifies current credit limit and balance
- Accumulate deposits against customer account
- Product Coupons
 - restrict usage against certain products
- Manufacturers Coupons
- Travellers Cheque
- Interest Free Credit
- Simple Vouchers and Accounts
- Local Authority Voucher

The various tenders are configured in the BackOffice to determine any of the following criteria:

- Currency ID
- Banking Tender
- Currency Purchase Tender
- Pickup Tender
- Float Tender
- List Tender
- Auto-Banked
- Money Pickup Option (Loose Money, Tender Bags, Either)
- Cashup Tender
- Safe limit
- Safe cash operation limit
- Safe discrepancy threshold
- Terminal cash operation limit
- Terminal discrepancy threshold
- Enter values by denomination
- Maximum tenders per transaction
- Force amount entered
- Capture customer's name and address for tender
- Capture Name and Address (with postcode lookup) for credits and/or debits
- Credit limit for capture

- Open drawer on tender
- Open drawer at transaction end
- Prevent Post Transaction Void
- Tender and Credit restrictions, e.g.
 - amount must be less than or equal to balance
 - amount must equal balance
 - amount must be less than next whole unit
 - amount must equal whole transaction
- Credit limit
- Tender change limit
- Change tender type
- Credit change limit
- Minimum credit amount
- Debit limit
- Minimum debit amount
- Credits allowed
- Debits allowed
- Prompt for reference number
- Frank Tender
- Endorsement style
- Minimum Transaction value
- Associated Product Tender Groups

Different types of tender have additional criteria set via the BackOffice. These are:

- Cash
 - drawer limit
- Cards, Customer Account, Local Account, Deposit Account, Loyalty Points:
 - disable card validation
 - disable reprinting of voucher
 - disable cancellation after printing of customer voucher
- Card
 - validation against IIN ranges, floor limits etc.

- APACS30 authorisation
- prints voucher on receipt printer
- Customer Account Card
 - validates card and performs authorisation
 - reads name and address from Customer Account details
 - verifies current credit limit and balance
 - accumulate deposits against customer account
- Deposit Account
 - accumulate deposits against customer account
- Employee Account
 - validates card and performs authorisation
 - reads name and address from Customer Account details
 - verifies current credit limit and balance
- Local Accounts:
 - print customer receipt
 - validates card and performs authorisation
 - reads name and address from customer account details
 - verifies current credit limit and balance
- Cheques:
 - minimum credit value
 - cheque payee
 - print cheque
 - cheque type
 - disable card validation
 - disallow unrecognised cards
 - floor limit
 - fallback floor limit
 - appraisal floor limit
 - cheque account number reading
 - Transax (APACS30 authorisation)
- Gift Vouchers:

- voucher type
- give change in gift vouchers
- other tender change limit
- configure denominations
- redeem by scanning or manual entry
- verifies serial number was issued and has not been re-used
- Rechargeable Voucher, Simple Voucher, Simple Account:
 - minimum Transaction Value
- Simple Account:
 - print voucher
- For Interest Free Credit:
 - maximum transaction percentage
 - number of monthly payments
 - prompt for authorisation code
 - minimum deposit value
 - fixed tender amounts
- Credit Note
 - print credit note with serial number
 - redeem by scanning or manual entry
 - verifies serial number was issued and has not been re-used
- Loyalty Points
 - pay with accumulated loyalty points at a configured exchange rate
 - authorise loyalty balance
- Electronic (Rechargeable) Vouchers
 - issue with an initial amount and recharge
 - track serial number
- Product Coupons
 - restrict usage against certain products
- Manufacturers Coupons
- Travellers Cheque

Wherever the amount is entered, it must be entered as a number with no decimal point, or commas etc., e.g. 123 = £1.23. The price will be displayed in a format which is locale dependant. At this stage in the transaction you can elect to store a current transaction, for recall later.

Only the relevant section of receipts are shown in this chapter. This is an example of a complete receipt:

Branch: 012013 Terminal: 0001 Transaction: 1920 Tom Dobbs 19/08/04 19:09

Baked Beans Today	x11	£10.80
Coffee		£0.00
Clear		£0.00
PROMOTION SAVING		
BUY 3 Baked Beans for £1.50		-£4.41
BALANCE DUE		£18.69
No. of Items		10

total to pay is: £18.69. Please select the appropriate tender.

Total: £18.69

Cash
Card
Foreign
Customer Account
More Tenders
Other
Sales

```

-----
WINE FESTIVAL 2001
20% OFF* ALL AUSTRALIAN WINE

Offer available 25/4 to 8/7
excludes case deals
-----
Coffee                3.45
Menswear              9.98
Non Merchandise       1.99
Pop Socks             2.54
-----
TOTAL                 £17.96
Cash                  -£20.00
Change                £2.04
-----
You could have earned 20 points.
-----

OPEN 24 HOURS
Monday 08:00 until Saturday 22:00
Sunday 10:00 - 16:00

THANK YOU
FOR SHOPPING AT TOREX
HERTFORD
TEL (01992) 907500

If you have any comments about today s
shopping trip, please let me know

KATH HOLT
CUSTOMER SERVICE
MANAGER

28/08/02 08:59 080066 0001 0057    1

```

For further information see "Tender Menu" on page 24.

1.7 Voids

The void actions have various criteria, depending on how the void is configured in the BackOffice. Some require an authorising operator to enter their ID and password to authorise the void. The void features include:

- Controlled by reason code
- Void Last item
- Scroll and select for Void
- Void Transaction
- Void Promotion
- Post Void

For further information see “Void Menu” on page 110.

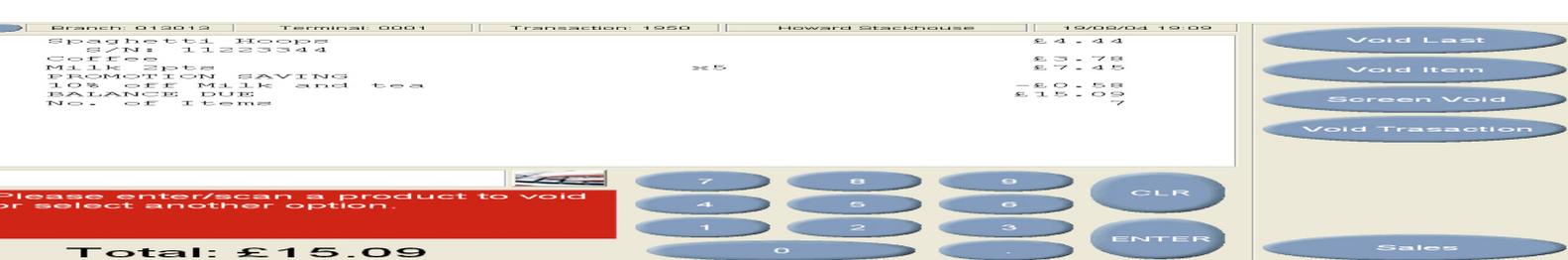
1.8 Returns

It is possible to perform a return operation on a selection of items. The result of the operation will appear on the screen as a negative cost (i.e. a refund).

The returns process includes the following:

- Control by reason code
- Capture name and address (with postcode lookup)
- Recall old receipt and check price
- Tracked returns (disputed returns)
- Price history display
- Track returned items against original receipt
- Deposit refund
- Gift Voucher return
- Refunds against MMG group or non merchandise returns

The criteria for returns, i.e. whether authorisation or reasons etc. are required, are configured in the BackOffice.



At this stage, you have the following options:

- Enter a product ID
You can either enter the product ID manually (up to 20 alphanumeric characters), or scan the product.
- Select an alternate option
You can perform several different types of return. The following sections describe the commands available under the Returns menu.

For further information see “Return Menu” on page 101.

1.9 Discounts and Overrides

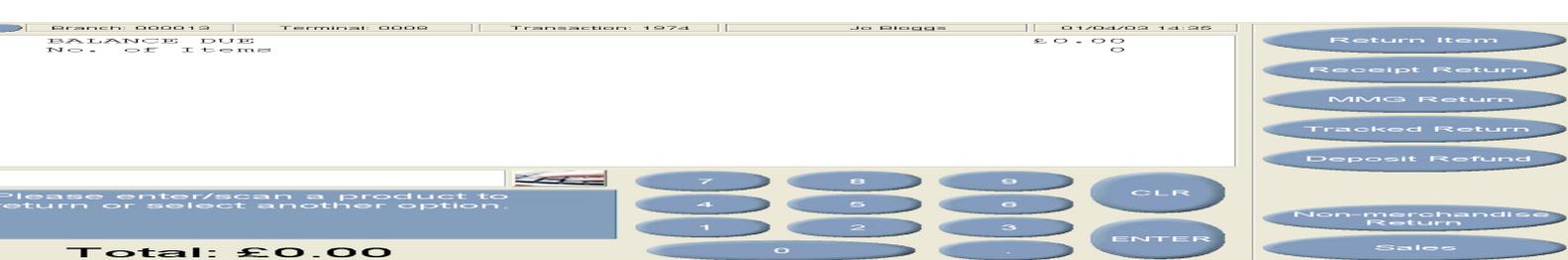
Various discounts and overrides can be applied during a transaction. A discount is where an authorised operator can apply a discount to an item, i.e. reduce the price of the item by an input amount. An authorised operator can perform overrides to change the price of an item, or override the current operator. For further information see “Sale Menu” on page 70.

1.9.1 Discounts

This section describes how to perform discounts on products. Discounts can be made against a particular item or a complete transaction.

The discounts and allowances features include:

- Item discounts
- Transaction discounts
- Employee Grade discount at total
- Selected by reason code allowing the following configuration by individual reason:
 - Control individual authorisation level
 - Allow for merchandise and/or non-merchandise items



- Capture name and address
- Capture Details
- Configure amount or value
- Restrict to a maximum discount percentage
- Restrict to single use
- Don't allow overlap with other discounts
- Employee discount
- Affect employee balance
- Allow if account balance offline
- Employee grade discount
- Start/end date/time when the discount is allowed
- Restrict to certain product discount groups

These are configured in the BackOffice.

1.9.2 Overrides

This option enables you to perform various override operations. The override actions have various criteria, depending on how the override is configured in the BackOffice. Some require an authorising operator to enter their ID and password to authorise the override. The allowances are controlled by reason code. The reason codes are configured in the BackOffice.

1.10 Storing and Recalling Transactions

It is possible to store the current transaction, or recall a previously stored transaction. These are the ways in which a transaction can be identified to be stored or recalled:

- Recall from receipt details or receipt bar code
- User number (auto store on sign off)
- Table number
- Arbitrary entered number
- Sign Off store
- Recall a recent transaction
- Recall an order

1.10.1 Storing Transactions

This option enables you to store the current transaction, for recall later. The transaction can be referenced using any of the following:

- ID number
- Transaction number

- Table name or number
- Server number

If an operator signs off in the middle of a transaction, the transaction is automatically stored. The transaction will be automatically recalled the next time that operator signs in.

For further information see “Store Menu” on page 23.

1.10.2 Recalling Transactions

This option enables you to recall a stored transaction. The transaction can be referenced using any of the following:

- Order
- Layaway
- Recent
- Transaction number
- ID number
- Table name or number
- User number
- Sign Off recall

For further information see “Recall Menu” on page 21.

1.11 Cash Management

Many cash management tasks can be performed at the POS. Sessions are created when the POS or store BackOffice attempts to make a cash management or sales transaction and there is no existing session open. Sessions can be closed to prevent any more transactions being carried out on them. In this case, any further transactions will cause a new session to be created.

A session which is marked as finalised is assumed to have been audited and may be submitted to a data warehouse. A cash management session may last any amount of time; it is not a fixed period. In practise it is likely to last a single day. Sessions are created when the first transaction finds that there is no active session.

For further information see “Cash Management” on page 55.

1.12 Manager Functions

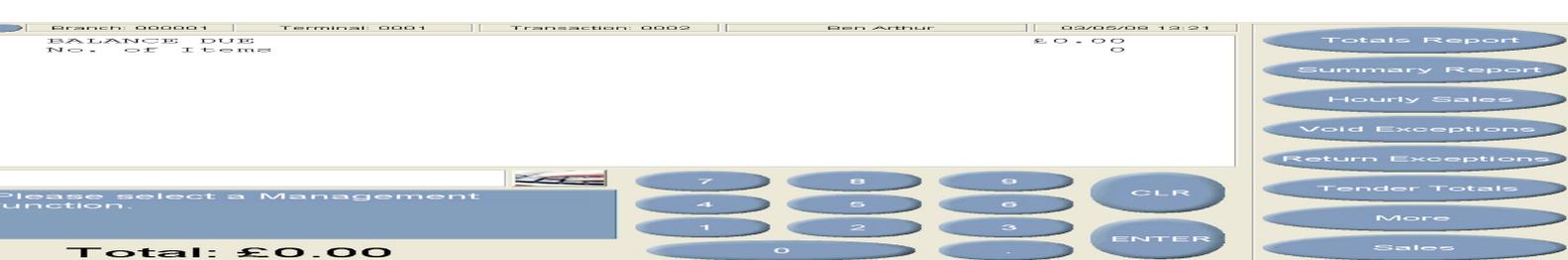
Some tasks at the POS can be carried out only by the store manager or another user with the required roles assigned to them in the BackOffice. The functions include various reports and the day start and day end functions.

For further information see “Manager” on page 44.

1.13 Administration

Some tasks at the POS can be carried out only by the system administrator or a user with the required roles assigned to them in the BackOffice.

The operations supported include:



- display archived transactions
- display stored basket messages
- populate data
- reload configuration

For further information see “Sale Menu” on page 70.

2.0 POS Commands

The POS application includes more than 300 commands. The arrangement of these commands is defined in the BackOffice application. The default POS menu set includes the following sub-menus under the *All Menus* heading:

- Recall Menu
- Store Menu
- Tender Menu
- Manager
- Cash Management
- Flight Menu
- Sign On Menu
- Sale Menu
- Return Menu
- Void Menu
- View Basket Menu
- Transaction Type Menu
- Customer Details Capture Menu
- Dispatch Menu
- Telephone Sale Menu
- Return To POS Menu
- Home Delivery Return Menu
- Order Menu
- Layaway Menu
- Collect Sale Menu
- Quote Menu
- Product Wastage Menu

- Non Sale Menu
- Offline Sale Menu

Depending on type the sub-menu, different commands can be assigned to it. Many commands can be assigned to more than one sub-menu while some sub-menus contain no unique commands. While it is possible to make all of the commands available from the POS, in practice most business do not require the complete set of commands. The following sections describe all of the available commands under the menus where they most commonly appear. Since the POS configuration is unique to each business, you may not see a given command under the menu where you would expect it to appear. In this case please refer to the index. There are also a small number of commands that are available under almost every sub-menu:

- *Numeric Keypad*

- 0
- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- 0
- .
- Clear
- Enter

- *Back*

Return to the previous screen.

- *Help*

Display help for the current screen, defined in the BackOffice.

Since the configuration of the POS is customer specific, it is left to the customer or partner to provide the web pages for use by the help system.

- *Navigate to Web Address*

Display a web page, defined in the BackOffice.

- *Thin Client Application*

Open a third-party thin client application, defined in the BackOffice.

- *Launch Application*
Open a third-party application, defined in the BackOffice.
- *Run Script*
Run a third-party script, defined in the BackOffice.

2.1 Recall Menu

2.1.1 Sales

Display the *Sale* menu (see <Undefined Cross-Reference>).

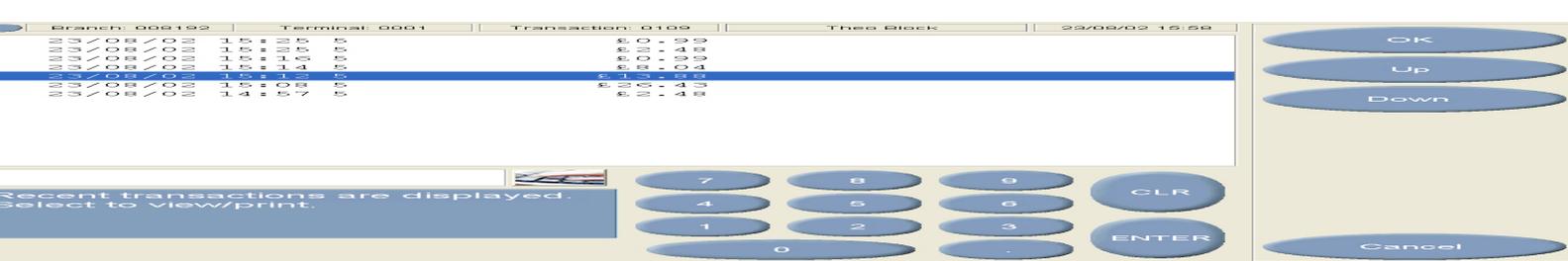
2.1.2 Transaction Recall

This option enables you to return to a transaction which was simply stored using the *Store* button (see “Store” on page 71). You have to enter a full transaction number, i.e. bbbbbbpppptttt, where bbbbbb is the branch number, pppp is the POS terminal number and tttt is the transaction number.

2.1.3 Recall Recent Transaction

This option enables you to recall the most recent transaction performed at the terminal. This is an example of the *Recall Recent Transaction* screen:

1. Select the required transaction from the list displayed on the screen. You can navigate the list either by pressing on the required transaction or using the *Up* and *Down* buttons. The selected transaction is highlighted.
2. Press the *OK* button to confirm the selection. You can only view or print the details of the transaction, no changes can be made at this point.
3. Choose one of the following options:
 - Print Copy (see “Print Copy” on page 116)
 - Tax Receipt (see “Tax Receipt” on page 116)
 - Gift Receipt (see “Gift Receipt” on page 116)



2.1.3.1 Print Copy

This enables you to print a copy of the receipt for the selected recent transaction. This is an example of the receipt produced:

```

***** COPY RECEIPT *****
Baked Beans Today          0.99
Milk 2pts                  1.49
-----
TOTAL                      £2.48
Cash                      -£5.00
Change                    £2.52
-----
You could have earned 30 points.
-----
  
```

2.1.3.2 Tax Receipt

This enables you to print a tax receipt for the selected recent transaction. It is a receipt which gives details of any tax included in the transaction. This is an example of the receipt produced:

```

***** COPY RECEIPT *****
Pop socks                  3.99
-----
TOTAL                      £3.99
Cash                      -£20.00
Change                    £16.01
-----
You could have earned 25 points.
-----
Tax Breakdown
Normal Rate (17.5%)      3.99    0.59
-----
  
```

2.1.3.3 Gift Receipt

This enables you to print a gift receipt for the selected recent transaction. It is a receipt which details the item(s) purchased, but does not include the price. This means that the product(s) could be exchanged or returned without the person knowing the price. This is an example of the receipt produced:

```

***** COPY RECEIPT *****
***** GIFT RECEIPT *****
Pop socks                  FXS
-----
  
```

2.1.4 Transaction Recall by ID

This option enables you to recall a transaction which was stored with an ID number (see "Storage Transaction Store by ID" on page 23). The ID number can be up to 20 alphanumeric characters.

2.1.5 Transaction Recall by User

This option enables you recall a transaction which was stored with the associated operator ID number (see "Transaction Store by User" on page 24).

2.1.6 Transaction Recall by Table

This option enables you to recall a transaction which was stored with an associated table ID (see "Transaction Store by Table" on page 24). The ID number can be up to 20 alphanumeric characters.

2.1.7 Transaction Recall by Customer

This option enables you to recall a transaction which was stored with an associated customer ID (see <Undefined Cross-Reference>). The ID number can be up to 20 alphanumeric characters.

2.1.8 Recall Customer Order

This option enables you to recall a current customer order. The order is selected by entering the customer order number (up to 13 alphanumeric characters, e.g. CO00100000004). This is an example of the receipt printed:

```

-----
***** COPY RECEIPT *****
Order Number: C0001000000004
Customer Number: 000001
-----

Mr Nicholas Jenkins
25 Oak Grove
Hertford
Herts
SG13 8AT
UK
-----
0 Ladies Socks      x 3      8.97
  Items dispatched x 3
  Item deposit      0.45
-----
TOTAL                £8.52
Cash                 -£20.00
Change               £11.48
-----
You could have earned 9 points.
-----

```

You are then returned to the previous screen to continue to process the order.

2.1.9 Recall Layaway

This option enables you to recall a layaway. It has almost the same format as the *Recall Customer Order* screen (see <Undefined Cross-Reference>).

2.1.10 Recall Collect Sale

This option enables you to recall a collect sale. It has almost the same format as the *Recall Customer Order* screen (see “Recall Customer Order” on page 23).

2.1.11 Recall Quote

This option enables you to recall a quote. It has almost the same format as the *Recall Customer Order* screen (see “Recall Customer Order” on page 23).

2.2 Store Menu

2.2.1 Transaction Store

Store the current transaction, referenced by the transaction number, for later recall (see “Recall Menu” on page 21).

2.2.2 Storage Transaction Store by ID

Store the current transaction, referenced by an ID number, for later recall. Enter a unique ID number (up to 20 alphanumeric characters) to reference the current transaction being stored. The transaction

can be recalled using the *Transaction Recall by ID* command (see “Transaction Recall by ID” on page 22) and specifying the ID number.

2.2.3 Transaction Store by User

This option enables you to store the current transaction referenced by your User ID, for recall later.

It stores the current transaction according to the server and returns you to the previous screen. The transaction can be recalled using the *Transaction Recall by User* command (see “Transaction Recall by User” on page 22).

2.2.4 Transaction Store by Table

This option enables you to store the current transaction, referenced by a table number or name, for recall later.

Enter a table number (up to 20 alphanumeric characters) to reference the current transaction being stored. It stores the current transaction and returns you to the previous screen. The transaction can be recalled using the *Transaction Recall by Table* command (see “Transaction Recall by Table” on page 22) and specifying the table number.

2.2.5 Transaction Store by Customer

This option enables you to store the current transaction referenced by customer ID, for recall later.

It stores the current transaction according to the server and returns you to the previous screen. The transaction can be recalled using the *Transaction Recall by Customer* command (see “Transaction Recall by Customer” on page 23).

2.3 Tender Menu

2.3.1 Sign Off

This screen enables you to sign off a particular terminal. This prevents any unauthorised access to the system when the terminal is not in use.

Press the *Sign Off* button to return to the *Sign On* menu (see “Sign On Menu” on page 65), ready for the next operator to sign on.

You may be automatically be signed off after a configurable period, or after each transaction. These values are configured in the BackOffice.

2.3.2 User Override

Enables a different user to override the current operator of the terminal for part or all of the transaction. It means that a second user can temporarily sign on to perform some operations and then use the *Clear Override* command (see “Clear User Override” on page 24) to force the terminal to revert back to the original operator.

The new user is prompted for an operator ID (up to 20 alphanumeric characters) and a password (up to 10 alphanumeric characters). The new user name will appear on the bottom of the screen surround by a red square. This will remain until the second operator clears the override or the end of the transaction is reached.

2.3.3 Clear User Override

Cancel an operator override operation. This makes the terminal revert back to the original operator.

2.3.4 Transaction Discount

This option enables you to apply a discount to the entire transaction. It is similar to the Item Discount

option, except that the discount applies to the complete transaction. This is an example of the receipt produced:

Personal CD Player	39.99
MP3 Player	29.99
Transaction Discount (69.98)	-7.00
600 10% off	

TOTAL	£62.98
Cash	-£65.00
Change	£2.02

You could have earned 68 points.	

On completion of the transaction discount operation, you are returned to the previous screen.

2.3.5 Cash Tender

This enables you to enter the cash amount tendered. This is an example of the *Cash* screen:

You have two options for entering the Cash amount:

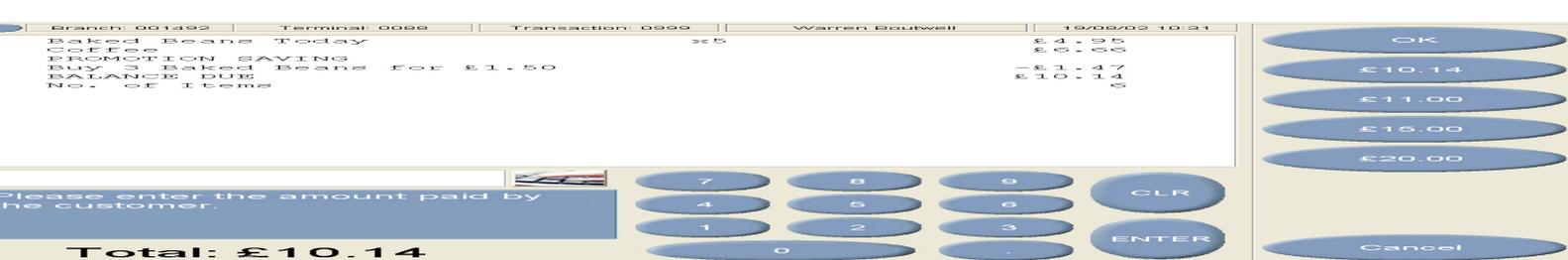
- Press a button to select the amount tendered
- enter the actual cash amount manually

When the amount has been entered, the *Cash - Transaction Complete* screen is displayed (see “Cash - Transaction Complete” on page 25).

Press the *Cancel* button to cancel the tender input operation and return to the *Tender* menu (see “Tender Menu” on page 24).

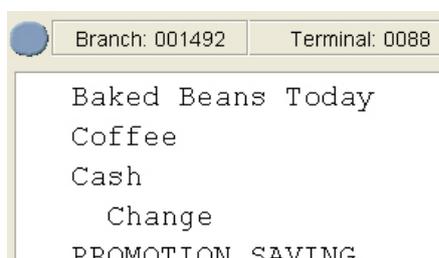
2.3.5.1 Cash - Transaction Complete

This screen shows the amount of any change owed to the customer and enables you to continue with another transaction. This is an example of the *Cash - Transaction Complete* screen:



Press the *Continue* button to return to the *Sale* menu (see “Sale Menu” on page 70), ready to start another transaction.

This is an example of the receipt produced:



2.3.6 Cheque Tender

This option enables you to accept a payment by cheque from a customer.

Enter the amount of the cheque. As with cash, you can either press a button which shows the total amount for the transaction or enter an amount if different.

You will then be prompted on consecutive screens to enter the following:

- *Type of Cheque*
Select whether it is a personal or business cheque.
- *Cheque Card*
Swipe the cheque card through the card reader. If the card is not read satisfactorily, you can enter the number manually.
- *Expiry Date*
Enter the expiry date, found on the cheque card. This must be four digits, two digits for the month and two digits for the year.

- *Cheque Guarantee Card Limit*
Enter the guaranteed limit allowed on the card.
- *Cheque Number*
Enter the number of the cheque. It must be six numeric digits.
- *Bank Sort Code*
Enter the bank sort code. It must be six numeric digits, with no hyphens etc., e.g. 110373.
- *Account Number*
Enter the account number. It must be eight numeric digits.
- *Cheque Reference Number*
Enter the reference number of the cheque. It must be a number in the range 1-40.

The system then attempts to authorise the cheque. If there are any problems, you are advised to telephone a displayed number for authorisation. When the cheque operation is complete, you are returned to the *Sale* menu (see “Sale Menu” on page 70).

This is an example of the receipt produced:

Mug	8.00
TOTAL	£8.00
Cheque	-£8.00
Auth Code: 229007	
You could have earned 85 points.	
00000100010201050207112422	

You can cancel the cheque transaction at any time by using the *Cancel* button. You will then be returned to the *Tender* menu (see “Tender Menu” on page 24).

2.3.7 Card Tender

This option enables you to process a credit or debit card from the customer, for payment for the transaction. The configuration controls for credit authorisation include:

- acquirers
 - authorisation connections
 - logical terminals
- IIN ranges
- card types
- tenders
- hot cards

These are configured in the BackOffice.

1. Swipe the customer's card through the card reader.
2. Enter the amount to be debited. As with cash, you can either use a button which details the total amount for the transaction, or enter an amount manually if required. You can use the *Cancel* button at this point to cancel the current tender action and return to the *Tender* menu (see "Tender Menu" on page 24).
3. If the card enables Cashback, now enter the amount for this.
4. The card voucher is printed at this stage, for the customer's signature. This is an example of the card voucher:

```

-----
      S A L E S   V O U C H E R
      Store Copy
-----
Card Type : AMERICAN EXPRESS
Number   : 3742 824524 53006
Start Date : 01/01
Expiry Date: 12/09
Auth Code  : 790780595
Merchant ID: 1234567890
Terminal ID: 1234
-----
Goods:                                     £12.26
TOTAL:                                     £12.26
-----
Please sign below

-----
Please Debit my Account as shown

04/04/03 10:51 000001 0001 0191 Operat
  
```

The *Card Check* screen is then displayed (see "Card - Check" on page 28).

2.3.7.1 Card - Check

This screen instructs you to check the customer's signature against that on the card used for payment. If the voucher has not printed correctly, you have the option to either reprint it, or raise a hand-written one. This is an example of the *Card Check* screen:

Check that the voucher has printed correctly and that the Customer's signature matches that on the card. Then press the *Signature OK* button to complete the transaction and print the following receipt:

Branch: 001492	Terminal: 0088
Baked Beans Today	
S/N: 1234	

The card voucher to be returned to the customer can appear as follows:

S A L E S V O U C H E R	
Customer Copy	

Card :	SWITCH
Number :	6333 00** **45 2340 KEYED
Start Date :	10/02
Expiry Date:	10/04
Auth Code :	797026
Merchant ID:	123456789012345
Terminal ID:	22750000

Goods:	£29.99
TOTAL:	£29.99

Please retain for your records	

You will be returned to the *Sale* menu (see “Sale Menu” on page 70).

Press the *Reprint* button to force a reprint of the voucher.

Press the *Manual Voucher* button to create a hand-written card voucher (see “Card - Manual Voucher” on page 30).

Press the *Cancel* button to cancel the card processing and return to the *Tender* menu (see “Tender

Menu” on page 24).

2.3.7.1.1 Card - Manual Voucher

This option enables you to produce a hand-written card voucher. In this case, the screen displays the required authorisation code to be entered by hand onto the voucher. This is an example of the *Card - Manual Voucher* screen:

The authorisation code to be written on the voucher is shown on this screen.

Press the *OK* button. You will be prompted to check the customer's signature on the voucher. Confirm that the signature has been checked to return to the *Sale* menu (see “Sale Menu” on page 70).

Press the *Cancel* button to cancel the card processing and return to the *Tender* menu (see “Tender Menu” on page 24).

2.3.8 Card Tender (Customer Not Present)

This option enables you to process a card when the customer is not present, for example by telephone. It has a very similar format to the card tender command (see “Card Tender” on page 27), except a voucher is not produced for the customer to sign. This is an example of the receipt produced:

Tea	2.55
Tea	2.55
Baked Beans Today	0.99
S/N: 3451561	
SUB TOTAL	6.09

You have saved/earned:	
10% off Milk and tea	-0.51

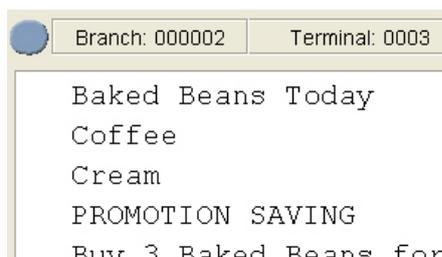
TOTAL	£5.58
Card	-£5.58

You could have earned 30 points.	

2.3.9 Foreign Cash Tender

This option enables you to enter the tender in a foreign currency. The currencies available are configured in the BackOffice. This is an example of the *Foreign* screen:

Press the button for the required currency. The system will automatically convert the balance according to the exchange rates configured in the BackOffice. The transaction continues exactly the same as for cash tenders (see “Cash Tender” on page 25). The exchange rate for the foreign tender is shown on the receipt. This is an example of the receipt produced:



Press the *Back* button to return to the *Tender* menu (see “Tender Menu” on page 24).

2.3.10 Customer Account

This enables you to accept a payment from a customer's account card. Swipe the Customer's card and press the *OK* button. Enter the amount of the debit, either by pressing the *Amount* button or entering the amount manually. The transaction continues as for the card payment (see “Card Tender” on page 27). This is an example of the receipt produced:

```

-----
Customer Number: 6356505553016150
Mr Mike Carr
Shooters
Westmill
Buntingford
Herts
SG9 9LJ
UK
-----
CD Player                49.99
-----
TOTAL                    £49.99
Customer Account        -£49.99
Account Number: 6356505553016150
-----
You could have earned 35 points.
-----

```

2.3.11 Gift Voucher Tender

This option enables you to accept gift vouchers in payment for goods sold. Gift vouchers are configured in the BackOffice and may include any of the following:

- force capture of name and address of customer
 - force capture serial number
 - track serial number
 - generate serial number
 - endorse at time of issue
1. Enter the amount tendered in gift vouchers.
 2. Select from a list which type of gift vouchers have been used.
 3. If the gift vouchers are serial number tracked, scan the serial number or enter it manually. You will return to the *Sale* menu (see “Sale Menu” on page 70) if the transaction is complete, or the *Tender* menu (see “Tender Menu” on page 24) if the gift vouchers did not cover the entire cost.

This is an example of the receipt produced:

```

-----
Coffee                    3.45
-----
TOTAL                    £3.45
Gift Voucher             -£5.00
Change                   £1.55
-----

```

2.3.12 Rechargeable Voucher Tender

This enables you to accept rechargeable vouchers in payment for goods. Rechargeable vouchers are cards onto which money can be put and then used at a later date. The amount entered is debited from the card. This is an example of the receipt produced:

Tea 250g	x 2	5.10
Milk 2pts		1.49
TOTAL		£6.59
Rechargeable Voucher		-£6.59
6340010036171085		

2.3.13 Credit Note Tender

This option enables you to either raise a credit note as a result of a returned item, or accept a credit note in payment for the goods sold.

2.3.13.1 Raise Credit Note

This option enables you to issue a credit note as a result of item(s) being returned. Enter the amount of the credit note required. A voucher is then printed for the customer to sign. This is an example of the voucher produced:

C R E D I T N O T E	
0800660001010100	
Mrs Jo Jenkins 25 Oak Grove Hertford Herts SG13 8AT	
AMOUNT	£5.99
** FIVE POUNDS AND 99 PENCE **	
Date Issued: 05-Sep-02 Credit Note expires one year from date issued.	
SIGNED:	_____
MANAGER:	_____
This Credit may be used to purchase any merchandise of a greater value at any store in the UK. This Credit Note is not refundable if lost or stolen.	
05/09/02 12:14 080066 0001 0101 1	

You will then be instructed to check the voucher has printed correctly. If the voucher has not printed correctly, you have the option to either reprint it, or raise a hand written one. This is an example of the receipt produced:

Mrs Jo Jenkins 25 Oak Grove Hertford Herts SG13 8AT	
Childrenswear	-5.99
TOTAL	-£5.99
Credit Note	£5.99

2.3.13.2 Accept Credit Note

This option enables you to accept a credit note in payment for goods. Enter the credit note number. This can be found at the top of the credit note, and can be either scanned in or entered manually. It includes the branch, terminal and transaction numbers.

Then enter the amount of the credit note, and confirm the customer's name and address (if required). If the credit note does not cover the entire cost of the transaction, you are returned to the *Tender* menu (see "Tender Menu" on page 24) to complete the transaction. Otherwise, you will be returned to the *Sale* menu (see "Sale Menu" on page 70). This is an example of the receipt produced:

Mrs Jo Jenkins	
25 Oak Grove	
Hertford	
Herts	
SG13 8AT	

Ladieswear	7.99

TOTAL	£7.99
Credit Note	-£5.99
Cash	-£2.00

2.3.14 Travellers Cheque

This enables you to accept traveller's cheques in payment for goods. This is an example of the receipt produced:

Milk 2pts	1.49

TOTAL	£1.49
Travellers Cheque	-£1.49

2.3.15 Coupon Tender

This enables you to accept basic coupons in payment for goods. It is dealt with exactly the same as for other tenders. This is an example of the receipt produced:

Milk 2pts	x 2	2.98

TOTAL		£2.98
Basic Coupon		-£1.00
Cash		-£2.00
Change		£0.02

2.3.16 Product Coupon Tender

This enables you to accept product coupons in payment for goods. These are coupons which are only applicable to specific products. Product coupons have a serial number associated with them which can be up to 19 characters. This is an example of the receipt produced:

Tea 250g	2.55

TOTAL	£2.55
50p off Tea	-£0.50
Cash	-£2.05

2.3.17 Manufacturer Coupon Tender

This enables you to accept manufacturer coupons in payment for goods. These are coupons which are only applicable to specific manufacturers. The coupon can be configured to require franking at the POS. You can frank the coupon either using the POS or manually. This is an example of the receipt produced:

Infant Socks	2.99

TOTAL	£2.99
Manufacturer Coupon	-£2.00
Cash	-£0.99

2.3.18 Manufacturer Coupon Type

This option relates to manufacturer coupons.

2.3.19 Loyalty Points Redemption

This option enables you to redeem loyalty points for payment from the customer. The customer loyalty card is swiped and the system validates the customer information before continuing with this operation. The system checks the loyalty balance available and applies the loyalty points to currency exchange rate when calculating the amount available and the amount to be deducted. This is an example of the receipt produced:

Tea 250g	2.55

TOTAL	£2.55
Loyalty Points	-255
Rate: 100/£	-£2.55

2.3.20 Deposit Account

This option enables you to enter an amount to be debited from a customer's deposit account. Criteria for this tender are the same as for other tenders and are configured in the BackOffice.

1. Enter the amount to be debited. The following screen is then displayed:

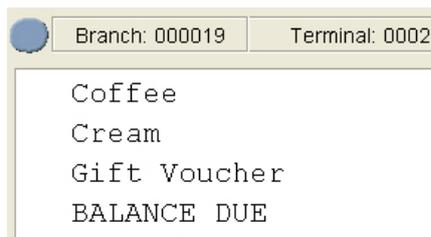
2. Enter the customer's account details using one of the following methods:
 - Swipe the customer's card through the card reader.
 - Manually enter the customer account number (up to 20 alphanumeric characters).
 - Press the *Search for Name* button. If the customer account number is not known, you can enter a surname and initiate a search on the system. The surname can be up to 20 alphanumeric characters.
 - Press the *Search by Postcode* button. Enter the Customer's postcode (up to 10 alphanumeric characters). The system will search the database for a customer with the specified postcode.

The results of either the above searches are displayed in a list, from which you can select the required details.

3. Confirm that the details are correct before the transaction is completed.

Press the *Cancel* button to cancel the current tender operation and return to the *Tender* menu (see "Tender Menu" on page 24).

This is an example of the receipt produced:



2.3.21 Local Account Tender

This option enables the customer to pay by a local account, i.e. one maintained by the retailer. The tender is only allowed providing the customer has enough funds in their account to cover the cost of the transaction.

1. Enter the amount of the payment. The amount should be entered as a number with no decimal point, or commas etc., e.g. 123 = £1.23. The following screen is then displayed:

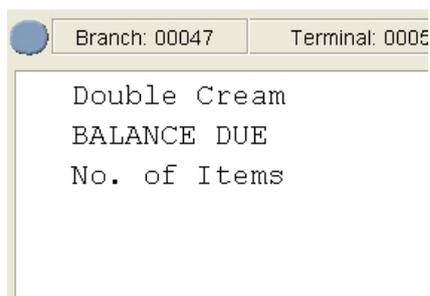
2. Select the required customer using one of the following methods:

- Swipe the customer's account card.
- Manually enter the customer's account ID number (up to 20 alphanumeric characters).
- Press the *Search Name* button. The name can be up to 20 alphanumeric characters. The results are displayed on this screen, in a list from which you can select the required customer. You can navigate the list by using the *Up* and *Down* buttons.
- Press the *Search Postcode* button. The postcode can be up to 10 alphanumeric characters. The results are displayed on this screen, in a list from which you can select the required customer. You can navigate the list by using the *Up* and *Down* buttons.

3. Press the *OK* button to display the customer details, i.e. name and address etc.

4. Press the *OK* button to confirm your selection.

This is an example of the receipt produced:



2.3.22 Employee Account Tender

This option enables you to process an account card from an employee, for payment for the transaction. It has exactly the same format as the customer account payment (see "Customer Account" on

page 31). This option is only available when an employee or employee grade sale is being performed. This is an example of the receipt produced:

***** Employee Sale *****	
Employee ID: 000002	
Miss Elisabeth Ford	
Account Starting Balance: 45.00	
Double Cream	0.75
Coffee	5.47
TOTAL	£6.22
Employee Account	-£6.22
Account Number: 000002	

2.3.23 Interest Free Credit Tender

This option enables the customer to buy on interest free credit.

1. Confirm the amount of interest free credit required. This is a percentage of the total, configured in the BackOffice. The following screen is then displayed, which details the amount of monthly payments:

2. Press the *OK* button to confirm the payments. Alternatively, press the *Cancel* button to return to the previous tendering screen.
3. Enter the customer's name and address if you are prompted to do so.
4. Enter a tender reference number.

This is an example of the receipt produced:

CD Player	29.99

TOTAL	£29.99
Test Simple Account	-£30.00
Account ID: 123412341234	
Change	£0.01

You could have earned 29 points.	

00000100010205050207135322	

2.3.26 Local Authority Voucher Tender

This option enables you to redeem a local authority voucher as a tender. This is an example of the receipt produced:

Tea	2.55
Milk 2pts	1.49
CD Player	29.99
SUB TOTAL	34.03

You have saved/earned:	
10% off Milk and tea	-0.40

TOTAL	£33.63
LAV	-£30.00
S/N: 1234	
Cash	-£3.63

You could have earned 54 points.	

00000100010202050207113012	

2.3.27 Business Account Tender

This option enables you to process a business account card, for payment for the transaction.

2.3.28 Health Service Voucher Tender

This option enables you to redeem a health service voucher as a tender.

2.3.29 Promotion Voucher Tender

This option enables you to redeem a promotion voucher as a tender.

2.3.30 Discount Voucher Tender

This option enables you to redeem a discount voucher as a tender.

2.3.31 Loan Tender

This option enables you to set up a loan in place of a normal tender.

2.3.32 US Cheque Tender

This option enables you to accept a payment by US cheque from a customer.

2.3.33 Capture Pickup Point

This option enables you to record the details of the location where the goods will be collected.

2.3.34 Suspend Order

This option enables you to suspend a customer order.

2.3.35 Capture Loyalty Account/Card

This option enables you to enter either loyalty account or loyalty card details, to enable the collection of loyalty points. It can be used any time during the selling or tendering process. It can also be used to issue new loyalty cards. This is an example of the *Loyalty Card* screen:

To identify the loyalty account:

1. Swipe the loyalty card. Alternatively, manually enter the loyalty card number (up to 20 alphanumeric characters).
2. Search the database for the customer's name or postcode. The name must not be more than 20 alphanumeric characters. You do not need to specify the whole name; just a partial name can be entered. The results are displayed in a list from which you can select the required employee. You can navigate the list using the *Up* and *Down* buttons.
3. Press the *OK* button to display the customer details.
4. Press the *OK* button to confirm the selection. You will be returned to the *Sale* menu to perform the transaction for the selected customer.

Press the *Issue Loyalty Card* button to issue a new loyalty card to the selected customer. Enter the number of the new loyalty card either by using the card reader, or manually entering the digits. Alternatively, press the *Cancel* button to return to the *Sale* menu without the loyalty account or card information being used.

This is an example of the receipt produced:

Branch: 00097	Terminal: 00101	Transaction: 0102	George Granger	10/07/10 09:11
BALANCE DUE				£0.00
No. of Items				0

Please swipe or enter the loyalty card, or enter part of the customer's name or postcode and press search.

Total: £0.00

7 8 9 CLR
4 5 6
1 2 3 ENTER
0 .

OK
Search Name
Search Postcode
Issue Loyalty Card
Cancel

Account Payment		10.00
Account Number: 6356505553016150		

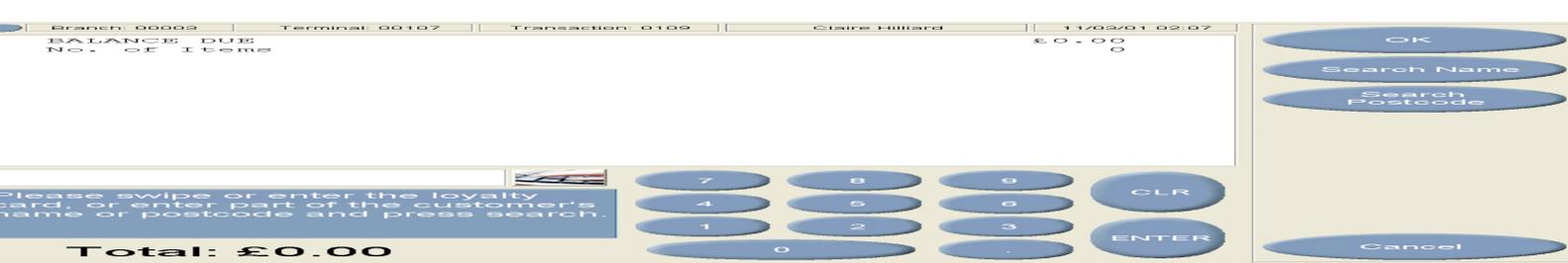
TOTAL		£10.00
Cash		-£10.00

00000100010150050126132422		

2.3.36 Loyalty Account Enquiry

This option enables you to get loyalty account information from the database. From this option you can amend the loyalty account details and/or view the purchase history for the selected loyalty account. This is an example of the *Loyalty Card Enquiry* screen:

1. Swipe the loyalty card.
2. Manually enter the loyalty card number (up to 20 alphanumeric characters).
3. Search the database for the customer's name or postcode. The name must no be more than 20 alphanumeric characters. You do not need to specify the whole name just a partial name can be entered. The results are displayed on this screen, in a list from which you can select the required employee. You can navigate the list using the *Up* and *Down* buttons.
4. Press the *OK* button to display the customer details.
5. Press the *OK* button to confirm the selection. You are then returned to the *Sale* menu to perform the transaction for the selected customer. Alternatively, press the *Cancel* button to return to the *Sale* menu without the loyalty account or card information being used.
6. When the required Loyalty account is located, the following screen is displayed:

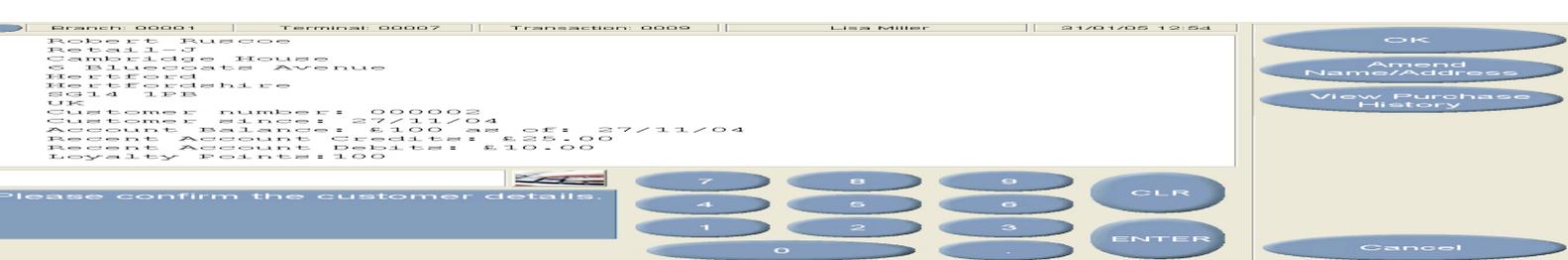


Select the required loyalty account by using the *Up* and *Down* buttons.

7. When the required account is selected, the following screen is displayed:

You have the following options at this point:

- Press the *OK* button to terminate the loyalty account enquiry and return to the *Sale* menu.
- Press the *Amend Name/Address* button to make changes to the name or address of the selected loyalty account (see “Capture Name and Address” on page 117 for details of the required format).
- Press the *View Purchase History* button to view the purchases that have been made associated with the selected loyalty account. The required transaction is selected from a list, using the *Up* and *Down* buttons. Details of the selected transaction are then displayed, for example:



Press the *Back* button to return to the previous screen.

2.3.37 Income Item

This option enables you to perform an income operation for a specific item.

2.3.38 Expense Item

This option enables you to perform an expense operation for a specific item.

2.3.39 Rechargeable Voucher Expense

This option enables you to perform an expense operation for a rechargeable voucher.

2.3.40 Manual End Transaction

This option enables you to manually end a transaction.

2.3.41 Confirm Order Items

This option enables you to confirm an item order.

2.3.42 Currency Converter

This option enables you to perform currency conversion.

2.3.43 Reset Scanner

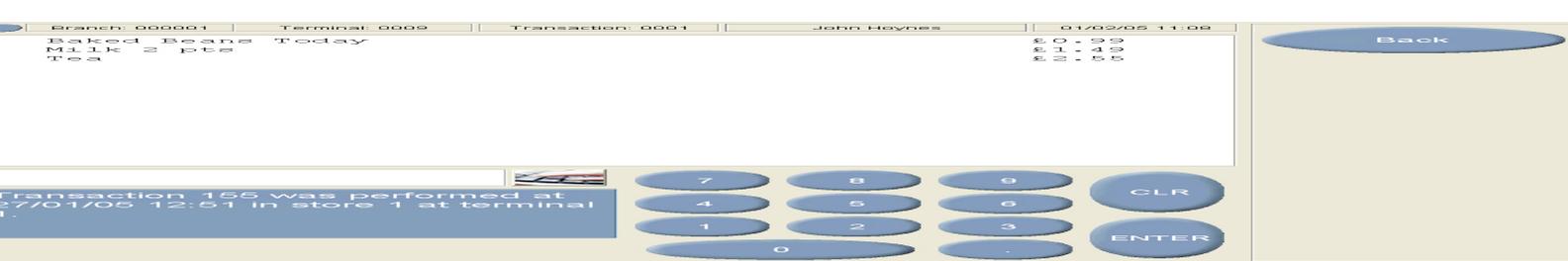
This option enables you to reset a scanner.

2.4 Manager

2.4.1 Force Training Mode

This option enables you to force the POS into (or out of) training mode. The screen and any receipts will reflect that transactions were performed in training mode. You can perform transactions as usual with the following exceptions:

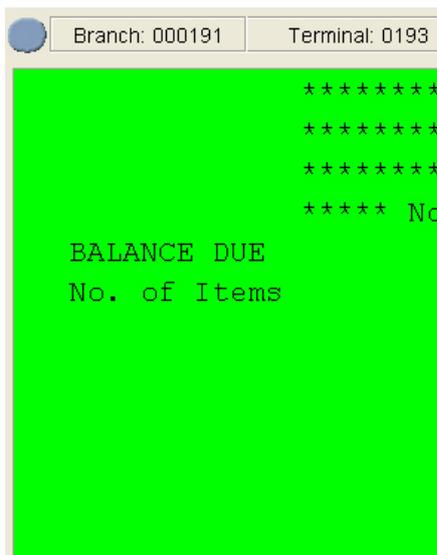
- Credit authorisation to a live host is not performed



- Reports do not usually include any training mode transactions
- The transaction is never processed into the submission tables
- Although the transaction goes through to sales audit, it is not usually included in any of the reports.

You must enter the authorising User ID and password to perform this operation. This is an example of the *Training Mode* screen:

This is an example of the receipt produced:



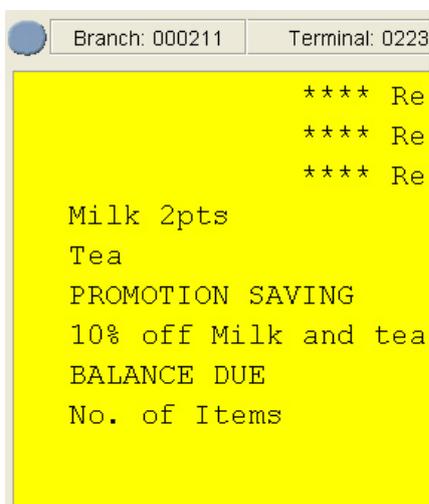
2.4.2 Re-Keying Mode

This option enables you to re-key a transaction which has previously failed for some reason. Use the leave re-keying option (see "Leave Re-Keying Mode" on page 46) to return to normal input mode.

You must perform the transaction as before. Your display will indicate that this is a re-keyed transaction.

The selling process is otherwise as normal, for example:

This is an example of the receipt produced:



2.4.3 Leave Re-Keying Mode

Exit re-keying mode.

2.4.4 Exit

Exit the POS application. This is used only for debugging purposes and is not normally present

2.4.5 Lock Terminal

Lock a terminal so that no further transactions can be made. This is an example of the *Lock Terminal* screen:

At this point you have two options:

- Press the *OK* button to check the terminal.
- Press the *Override* button to manually activate the terminal. In this case you must enter an authorising User ID and password. If accepted, you will be returned to the *Sign On* menu (see “Sign On Menu” on page 65).

2.4.6 Unlock Terminal

Unlock a POS terminal which was previously locked by the *Lock Terminal* command (see “Lock Terminal” on page 46).

2.4.7 Terminal Totals Report

This option enables you to print out the running totals for the terminal, for example:



The following information is printed:

- *Gross Positive*
The running total of the gross positive sales for the terminal.
- *Gross Negative*

The running total of the gross negative sales for the terminal.

- *Last Sale*

The date of the last sale entered into the terminal.

- *Next Transaction Number*

The number of the next transaction on the terminal.

- *Number of Sales*

The number of sales which have been made from the terminal.

- *Training Mode Transactions*

The total number of transactions performed which the terminal was in training mode.

- *Training Mode Gross Positive*

The running total of all positive values for the selected terminal when in training mode. This would include gross, sales and other positive values, such as discounts on returns.

- *Training Mode Gross Negative*

The running total of all negative values for the selected terminal when in training mode. This would include returns and other negative values such as discounts and allowances.

2.4.8 Terminal Summary Report

This option enables you to print out the summary report for the terminal, for example:

```

-----
Terminal Trading Summary Report
-----
Terminal 1
Trading from 02/03/04 22:00
Sales                £269.44
Returns              £0.00
Net Sales            £269.44
Deposits             £0.00
Net Merchandise      £269.44
Allowances           £0.00
Price Overrides      £0.00
Discounts            £0.00
Promotions           £0.00
Transaction Discounts £0.00
Total Merchandise    £269.44
Non-merchandise      £0.00
Account Payments     £0.00
Change In            £0.00
Change Out           -£17.04
Floats               £0.00
Pickups              £0.00
Income               £0.00
Expense              £0.00
Tax                  £38.72
-----
03/03/04 12:18 000001 0001   jo
-----

```

The following information is printed:

- *Sales*

The total value of all sales made in the current session.

- *Returns*

The total value of all returns made in the current session.

- *Net Sales*

The total value of all net sales made in the current session.

- *Deposits*

The total value of all deposits made in the current session.

- *Net Merchandise*

The total value of all net merchandise sales made in the current session.

- *Allowances*

The total value of all allowances made in the current session.

- *Price Overrides*

The total value of all price overrides made in the current session.

- *Discounts*

The total value of all discounts made in the current session.

- *Promotions*

The total value of all promotions made in the current session.

- *Transaction Discounts*

The total value of all transaction discounts made in the current session.

- *Total Merchandise*

The total value of all merchandise sales made in the current session.

- *Non-merchandise*

The total value of all non-merchandise sales made in the current session.

- *Account Payments*

The total value of all account payments made in the current session.

- *Change In*

The total value of all change received in the current session. This occurs if the customer has to give change to you for some reason.

- *Change Out*

The total value of all change paid out in the current session.

- *Floats*

The total value of all float operations made in the current session.

- *Pickups*

The total value of all pickup operations made in the current session.

- *Income*

The total value of all income operations made in the current session.

- *Expense*

The total value of all expense operations made in the current session.

- *Tax*

The total value of all tax charged in the current session.

2.4.9 Terminal Tender Totals Report

This option enables you to print out the tender totals report for the terminal. It shows the total of each tender being used by the Manager in the current session, for example:

Terminal Tender Totals Report		
Terminal 1		
Trading from 02/03/04 22:00		
Deposit Account	1	£2.99
Product Coupon	1	£0.50
Interest Free Credit	2	£162.95
Cash	17	£127.45
US Dollars	1	\$6.00
Cheque	1	£3.97
Card	1	£84.98
Gift Voucher	1	£10.00
Coupon	1	£1.00

03/03/04 13:09 000001 0001		jo

2.4.10 Terminal Hourly Sales Report

This option enables you to print out the hourly sales report for the terminal, for example:

```

-----
Terminal Hourly Sales Report
-----
Terminal 1
Trading from 27/08/02 22:00
Start of day 28/08/02
08:00-08:59      1      £1.49
09:00-09:59      0      £0.00
10:00-10:59      4      £22.58
11:00-11:59      0      £0.00
12:00-12:59      0      £0.00
13:00-13:59      0      £0.00
14:00-14:59      0      £0.00
15:00-15:59      0      £0.00
16:00-16:59      0      £0.00
17:00-17:59      0      £0.00
18:00-18:59      0      £0.00
19:00-19:59      0      £0.00
20:00-20:59      0      £0.00
End of day 28/08/02
-----
28/08/02 11:02 080066 0001      4
-----

```

This report shows the total value of sales for each hour of the current day. The number between the time and the value of sales indicates the total number of transactions performed in each hour.

2.4.11 Terminal Void Exceptions Report

This option enables you to print out the void exceptions report for the terminal, for example:

```

-----
Terminal Void Exceptions Report
-----
Terminal 1
Trading from 02/03/04 22:00
-----
Void Transaction
User ID              jo
Transaction Number   237
Date/Time            03/03/04 10:56
Auth User ID
Item Code
Amount               -£29.99
-----
03/03/04 12:25 000001 0001      jo
-----

```

The following information is printed:

- *Type of Void*
The type of void, in this example Void Item.
- *User ID*
The User ID of the Manager performing the void, in this example jo.
- *Transaction Number*
The transaction number which contained the void, in this example 237.
- *Date/Time*
The date and time of the void exception, in this example 03/03/04 10:56.

- *Authorising User ID*
The Manager number of person who authorised the void.
- *Item Code*
The item code associated with the void, if applicable.
- *Amount*
The amount of the void, in this example -£29.99.

2.4.12 Terminal Return Exceptions Report

This option enables you to print out the return exceptions report for the terminal, for example:

Terminal Return Exceptions Report	
Terminal 1	
Trading from 02/03/04 22:00	
User ID	jo
Transaction Number	241
Date/Time	03/03/04 12:30
Auth User ID	
Item Code	3
Amount	-£5.10
03/03/04 12:32 000001 0001 jo	

The following information is printed:

- *User ID*
The User ID of the Manager performing the void, in this example jo.
- *Transaction Number*
The transaction number which contained the void, in this example 241.
- *Date/Time*
The date and time of the void exception, in this example 03/03/04 12:30.
- *Authorising User ID*
The user ID of the person who authorised the void, if applicable.
- *Item Code*
The item code associated with the return, in this example 3.
- *Amount*
The amount of the void, in the above example -£5.10.

2.4.13 Multiple Reports

Print out a copy of each report, e.g. terminal totals, trading summary, tender totals, hourly sales, void

exceptions and return exceptions.

2.4.14 Remote Report

Print a remote terminal report on the receipt printer. The customer defined report is generated remotely and sent as XML which is then printed on the receipt. It is not normally used as BackOffice applications, e.g. cash management, can be run from the POS and configured to use the POS printer.

2.4.15 End Of Day Report

This option enables you to produce an End of Day report.

2.4.16 Fiscal X Report

This option enables you to produce a Fiscal X report.

2.4.17 Fiscal Z Report

This option enables you to produce a Fiscal Z report.

2.4.18 Fiscal Periodic Totals Report

This option enables you to produce a Fiscal Periodic Totals report.

2.4.19 Fiscal Power Loss Report

This option enables you to produce a Fiscal Power Loss report.

2.4.20 Day Start

Initiate the day start process at any time. The process is controlled by the queued jobs system. A scheduler processes intermittent checks to see if it is time to launch day start and produces a job accordingly. Day start is automatically started at normal day start time, unless it has already been started manually. The day start process:

- sets terminals in use
- ensures there is a valid trading session

2.4.21 Day End

Initiate the day end process at any time. The process is controlled by the queued jobs system. A scheduler processes intermittent checks to see if it is time to launch day end and produces a job accordingly. Day end is automatically started at the latest day end time, unless it has been manually started already. The day end process:

- purges old dynamic data
- closes the current trading session
- sets terminals out of use

2.4.22 POS Day Start

Perform a POS day start command. This is similar to the day start command (see “Day Start” on page 53) except that it only applies to the terminal on which it was instigated.

2.4.23 POS Day End

Perform a POS day end command. This is similar to the day end command (see “Day End” on page 53) except that it only applies to the terminal on which it was instigated.

2.4.24 Update ICC Device

Update any attached ICC (chip and pin) device. You will be asked to confirm you want to update the device. Providing the device is present, it will be updated with the latest firmware and application files.

Updating the ICC Device will take several minutes. Once the update is started, it cannot be cancelled. The POS will be unusable during the update. An appropriate success or fail message will be displayed when the update is complete. The files to be sent to the device and the application and firmware directories that the command will look at are configured in the BackOffice.

2.4.25 Set EFT Transaction Number

This option enables you to set the EFT (Electronic Funds Transfer) transaction number for a selected acquirer. It has a similar format to the *Get EFT Transaction Number* screen (see “Get EFT Transaction Number” on page 54) except you have the option to change the EFT Transaction Number.

2.4.26 Get EFT Transaction Number

This option enables you to determine the EFT (Electronic Funds Transfer) transaction number for a selected acquirer.

The command can be configured in one of two ways:

- The button can refer to a single acquirer. In this case the EFT transaction number is just displayed.
- The button can refer to all acquirers

This is an example of the screen displayed (for all acquirers):

1. Select the required acquirer from a displayed list, using the *Up* and *Down* buttons.
2. Press the *OK* button to select the required acquirer. The following screen is displayed:



Alternatively, press the *Cancel* button to return to the previous screen.

3. Press the *OK* button to return to the *Sale* menu.

2.4.27 Print System Information

This option enables you to print out the system information.

2.4.28 Session Tender Totals Report

This option enables you to produce a Session Tender Totals report.

2.4.29 Print Queue Manager

This option enables you to manage the print queue.

2.4.30 Select Transaction Type

This option enables you to select a transaction type.

2.4.31 Card System Administration

This option enables you to perform administration functions on the card system.

2.4.32 Card System Start of Session

This option enables you to set the start of session on the card system.

2.4.33 Card System End of Session

This option enables you to set the end of session on the card system.

2.5 Cash Management

2.5.1 Open Terminal/Cashier Session

This option enables you to open a new terminal/cashier session.



2.5.2 Terminal/Cashier Float

This option enables you to put a new float into the terminal. It records money that is issued to a terminal from a safe. This can be done at any time of the active session. This is an example of the *Float* screen:

1. Navigate the list of tenders by using the *Up* and *Down* buttons.
2. Press the *Select* button to select the required tender. You can then enter the required values for each tender. Wherever the amount is entered, it must be entered as a number with no decimal point, or commas etc., e.g. 123 = £1.23.
3. Press the *Complete* button when the float operation is complete. You will be returned to the *Cash Management* menu (see “Cash Management” on page 55). Alternatively, press the *Cancel* button to cancel the float operation and return to the *Cash Management* menu (see “Cash Management” on page 55)

2.5.3 Terminal/Cashier Opening Float

This option enables you to perform an opening float. The opening float function simply confirms that what was left in the till the previous night is this morning's float. It can be overridden if required. It has the same format as the terminal/cashier float command (see “Terminal/Cashier Float” on page 56). A report is sent to the printer, for example:



2.5.4 Terminal/Cashier Pickup

This option enables you to perform a pickup operation. It records money that is removed from the terminal and placed in a safe. During a normal day pickups are taken from the terminals at any point. A pickup means that some or all of the contents of the terminal are removed and counted during an active

session.

This option enables you to identify exactly what has been removed from the terminal. Tenders can be marked as auto pickup (e.g. credit cards) where values are calculated automatically. The format is the same as for the float operation (see “Terminal/Cashier Float” on page 56). This is an example of the *Pickup* screen:

2.5.5 Uncounted Terminal/Cashier Pickup

This option enables you to perform an uncounted pickup from the POS.

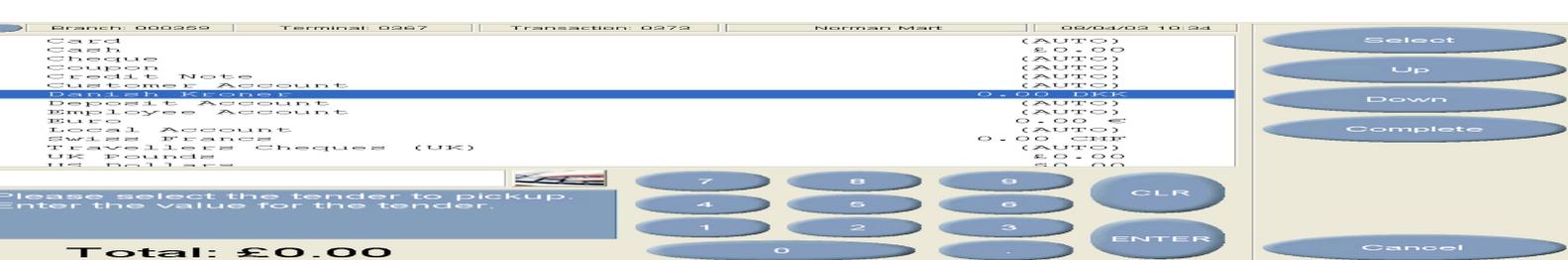
2.5.6 Terminal/Cashier Uncounted Pickup and Close

This option enables you to perform an uncounted pickup from the POS and close the terminal/cashier session.

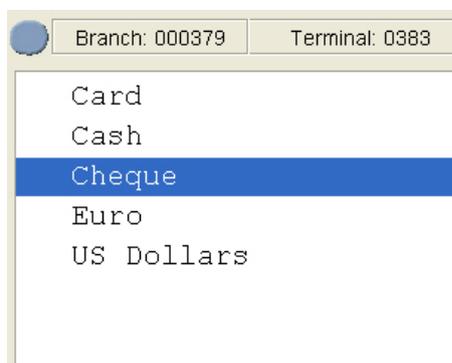
2.5.7 Terminal/Cashier Income

This option enables you to perform an income operation. Income operations are controlled by reason code, which are configured in the BackOffice. The reason codes specify what tenders are allowed for particular reasons.

1. Select the reason for the income from a list displayed on the POS. The following screen is displayed:



2. Navigate the list of tenders by using the *Up* and *Down* buttons. The tenders available will depend on the criteria defined in the BackOffice.
3. Press the *Select* button to select the required tender. You can then enter the required amount of the selected tender. Wherever the amount is entered, it must be entered as a number with no decimal point or comma, e.g. 123=£1.23. A voucher is printed out on the POS printer, for example:



4. Press the *Complete* button when the income operation is complete. You will be returned to the *Cash Management* menu (see “Cash Management” on page 55).

2.5.8 Terminal/Cashier Expense

This option enables you to perform an expense operation. Expense operations are controlled by reason codes which are configured in the BackOffice. The format is the same as for the Income operation (see “Terminal/Cashier Income” on page 57). A voucher is printed out on the POS printer, for example:

```

-----
Expense Values
-----
Terminal 1

951 Postage

Cash                                £26.00
-----
Signature: _____
-----
03/03/04 13:46 000001 0001    jo
-----

```

2.5.9 Terminal/Cashier Spot-check

This option enables you to perform a spot check on the contents of the terminal, at a particular time. A spot check is performed while the terminal is trading. It is simply a record of the drawer contents at any particular time of the session. The contents of the drawer are merely counted, but not removed.

Spot checks can be made at any stage on non-finalised sessions. The result of a spot check is a discrepancy report showing cash management operation(s), sales, expected, counted and discrepancy values broken down by tender. The format is the same as for the float operation (see "Terminal/Cashier Float" on page 56). A report of the spot check is printed, for example:

```

-----
Spot-check Count
-----
Terminal 1

Card                                £0.00
Cash                                £50.00
Cheque                               £0.00
Coupon                               £0.00
Credit Note                          £2.00
 2134                                £2.00
Customer Account                     AUTO
D Mark                               0.00 DM
Deposit Account                      AUTO
Employee Account                     £0.00
Euro                                 0.00 €
French Francs                        0.00 F
Gift Voucher                          £5.00
Interest Free Credit                 £0.00
Local Account                        AUTO
Loyalty Points                       AUTO
Manufacturer Coupon                 £0.00
Product Coupon                      £0.00
Rechargeable Voucher                £0.00
Traveller's Cheque                  £0.00
UK Pounds                            £0.00
US Dollars                            $0.00
-----
03/03/04 13:35 000001 0001    jo
-----

```

2.5.10 Terminal/Cashier Blind Spot-check

This option enables you to perform a blind spot-check on a POS.

2.5.11 Terminal/Cashier Cashup and Empty

This option enables you to perform a cash-up and empty operation. This means that the drawer contents are counted and removed. At cashing up, all pickups and floats that have occurred during the session must be entered. The session is marked as closed and no further transaction, whether sales or

cash management, can continue on that session.

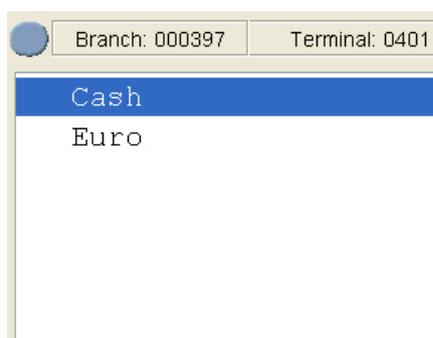
Select if the drawer is being removed or not, by pressing the appropriate button, e.g. *Empty Drawer*. The format is the same as for the float operation (see “Terminal/Cashier Float” on page 56). You can press the *Tender Bags* button to display the *Tender Bags* screen (see “Tender Bags” on page 60). A report is printed out on the POS printer, for example:

Reconciliation Count (Empty Drawer)		
Terminal 1		
Card		AUTO
Expected		£270.91
Discrepancy		£0.00
Cash		£554.95
Expected		£554.95
Discrepancy		£0.00
Cheque		£0.00
Expected		£81.38
Discrepancy		-£81.38
Coupon		£5.00
Expected		£5.00
Discrepancy		£0.00
Credit Note		£0.00
Expected		£0.00
Discrepancy		£0.00
Customer Account		AUTO
Expected		£224.52
Discrepancy		£0.00
Deposit Account		AUTO
Expected		£0.00
Discrepancy		£0.00
Employee Account		£0.00
Expected		£0.00
Discrepancy		£0.00
Euro		20.00 €
Expected		-40.00 €
Discrepancy		60.00 €
Gift Voucher		£5.50
Expected		£5.50
Discrepancy		£0.00
Local Account		AUTO
Expected		£0.00
Discrepancy		£0.00
Local Auth Voucher		£0.00
Expected		£30.00
Discrepancy		-£30.00
Product Coupon		£0.00
Expected		£0.00
Discrepancy		£0.00
Rechargeable Voucher		£0.00
Expected		£0.00
Discrepancy		£0.00
Test Simple Account		AUTO
Expected		£45.00
Discrepancy		£0.00
Test Simple Voucher		AUTO
Expected		£15.00
Discrepancy		£0.00
Traveller's Cheque		£0.00
Expected		£0.00
Discrepancy		£0.00
US Dollars		£0.00
Expected		£273.20
Discrepancy		(£273.20)
08/02/05 11:34 000001 0001 ADMIN		

2.5.11.1 Tender Bags

This option enables you to enter details of a tender which has been bagged-up. The following screen is displayed:

1. Select the required tender from the list using the *Up* and *Down* buttons.
2. Press the *Complete* button to complete the tender bags operation and return to the previous screen. Alternatively, Press the *Cancel* button to cancel the tender bags operation and return to the previous screen.
3. Enter the amount for that tender. You will be prompted to enter the following:
 - tender bag number (up to 20 alphanumeric characters)
 - bank slip reference
4. A report is then sent to the printer, on completion of the operation, for example:



2.5.12 Terminal/Cashier Cashup and Leave

This option enables you to perform a cash-up and leave operation. This means that the drawer contents are counted and left in for the next session. At cashing up, all pickups and floats that have occurred during the session must be entered. The session is marked as closed and no further transaction, whether sales or cash management, can continue on that session.

Select whether the drawer is being removed or not by pressing the appropriate button, e.g. *Leave in Drawer*. The format is the same as for the float operation (see "Terminal/Cashier Float" on page 56). A report is printed out on the POS printer, for example:

```

-----
Reconciliation Count (Leave in Drawer)
-----
Terminal 1
Card                £25.48
Cash                £0.00
Cheque              £12.99
  12.99              £12.99
Coupon              £0.00
Credit Note         £0.00
Customer Account    AUTO
D Mark              0.00 DM
Deposit Account     AUTO
Employee Account    £13.24
Euro                34.21 €
French Francs       0.00 F
Gift Voucher        £0.00
Interest Free Credit £0.00
Local Account       AUTO
Loyalty Points      AUTO
Manufacturer Coupon £2.00
  £34                £2.00
Product Coupon      £0.00
Rechargeable Voucher £0.00
Traveller's Cheque £0.00
UK Pounds           £0.00
US Dollars          $25.00
-----
03/03/04 13:39 000001 0001   jo
-----

```

2.5.13 Terminal/Cashier Cashup Closing Float

This screen enables you to perform a cash-up and closing float operation. It is a combined command consisting of a cash-up and empty (see “Terminal/Cashier Cashup and Empty” on page 59) followed by a float operation in preparation for the next day's trading.

1. Enter the float values (as in “Terminal/Cashier Float” on page 56). A report is printed:

```

-----
Float Values
-----
Terminal 1
Cash                £50.00
Cheque              £0.00
Euro                20.00 €
US Dollars          $0.00
-----
08/02/05 12:52 000001 0001  ADMIN
-----

```

2. Enter the Cash Up values (as in “Terminal/Cashier Cashup and Empty” on page 59). A report is printed:

```

-----
Reconciliation Count (Empty Drawer)
-----
Terminal 1
Card                AUTO
  Expected          £29.99
  Discrepancy       £0.00
Cash                £203.70
  Expected          £203.70
  Discrepancy       £0.00
Cheque              £0.00
  Expected          £1.50
  Discrepancy      -£1.50
Coupon              £0.00
  Expected          £0.00
  Discrepancy       £0.00
Credit Note         £0.00
  Expected          £0.00
  Discrepancy       £0.00
Customer Account    AUTO
  Expected          £0.00
  Discrepancy       £0.00
Deposit Account     AUTO
  Expected          £0.00
  Discrepancy       £0.00
Employee Account    £0.00
  Expected          £0.00
  Discrepancy       £0.00
Euro                76.00 €
  Expected          76.00 €
  Discrepancy       0.00 €
Gift Voucher        £0.00
  Expected          £0.00
  Discrepancy       £0.00
Local Account       AUTO
  Expected          £0.00
  Discrepancy       £0.00
Local Auth Voucher  £0.00
  Expected          £0.00
  Discrepancy       £0.00
Product Coupon      £0.00
  Expected          £0.00
  Discrepancy       £0.00
Rechargable Voucher £0.00
  Expected          £0.00
  Discrepancy       £0.00
Test Simple Account AUTO
  Expected          £0.00
  Discrepancy       £0.00
Test Simple Voucher AUTO
  Expected          £0.00
  Discrepancy       £0.00
Traveller's Cheque  £0.00
  Expected          £0.00
  Discrepancy       £0.00
US Dollars          £0.00
  Expected          £0.00
  Discrepancy       £0.00
-----
08/02/05 12:53 000001 0001 ADMIN
-----

```

2.5.14 Close Terminal/Cashier Session

Closes the current session, giving it an end date, and opens a new session. A closed session can receive further cash management actions and corrections to previous actions. This means that the session will not be used for further transactions. The terminal is ready for cashing up. Any new sales will go

into the following session. You will be asked to confirm the closure before being returned to the *Cash Management* menu.

2.5.15 Finalise Terminal/Cashier Session

Enables you to attempt to finalise the terminal cash management session. It finalises the current session so that no alterations can be made. It sets new session opening values to that performed in the cash-up. A session which is marked as finalised is assumed to have been audited and may be submitted to a data warehouse. This means that the values have been accepted and no corrections can be made to the session. You will be asked to confirm the closure before being returned to the *Cash Management* menu.

2.6 Flight Menu

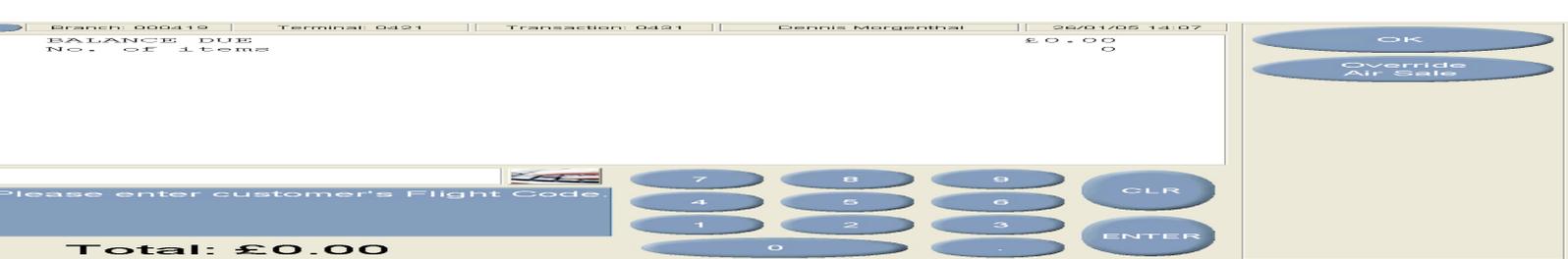
2.6.1 Airport Sale

This option enables you to perform sales associated with a particular airport and customer flight. The details on each airport are configured in the BackOffice.

The sales can be made associated with an airport or airport staff. In order to perform airport sales, the location must be configured as an Airport Terminal in the BackOffice. This is an example of the *Sign On* screen for Airport Sales:

1. Enter the Flight Code (up to 10 alphanumeric characters).
2. Press the *OK* button to confirm the customer's flight code.
3. Enter the Destination Airport (three alphabetic characters).
4. Select the Destination Zone. This is selected from a list which is navigated using the *Up* and *Down* buttons. The available zones are configured in the BackOffice.

This is an example of the receipt produced:



Flight Code: A1234	
Destination: abc	
Tea	2.55
Tea	2.55
SUB TOTAL	5.10

You have saved/earned:	
10% off Milk and tea	-0.51

TOTAL	£4.59
Cash	-£5.00
Change	£0.41

You could have earned 30 points.	

00000100010132050118110644	

To continue with the sale without entering the customer's flight code, press the *Override Air Sale* button. In this case the transaction continues as a normal transaction (see "Sale Menu" on page 70).

2.6.2 Override Airport Sale

Continue with the sale without entering the customer's flight code. In this case the transaction continues as a normal transaction (see "Sale Menu" on page 70).

2.6.3 Sell From Website

This option enables you to perform website sale.

2.7 Sign On Menu

This menu is displayed when the POS is first started. No actions can be performed until you have signed on.

The signing on process has the following security measures:

- users sign on with user name and password



- can swipe or scan card
- password required (optional)
- password can be configured to expire after a given number of days
- individual functional access controlled by role
- roles assigned to users
- automatic sign-off after configurable period of inactivity

These criteria are configured in the BackOffice.

2.7.1 Sign On

To sign on:

1. Enter an operator ID (up to 20 alphanumeric characters).
2. Press the *Sign On* button.

Alternatively, sign on using a card which is read by the card reader. The number on the card is not necessarily the same as your ID number.

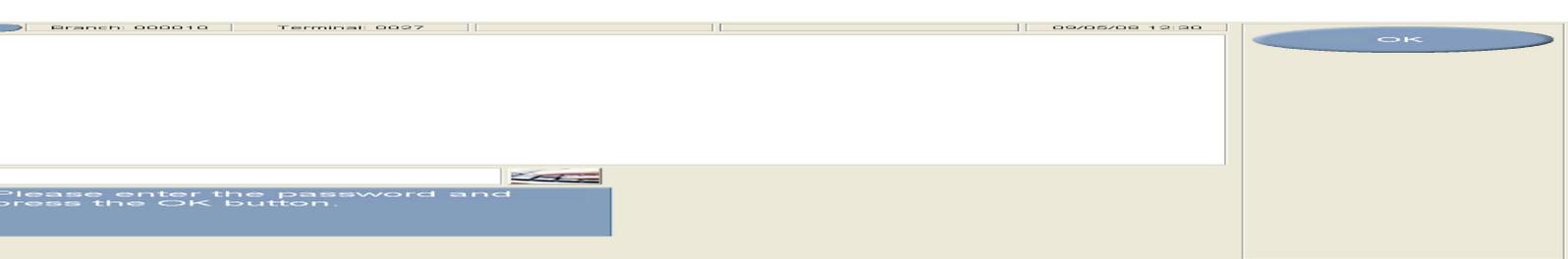
Some operators then have to enter a password. In this case the *Password Select* screen (see “Password Select” on page 66) is displayed. If you do not need to enter a password, the *Sale* menu is displayed (see “Sale Menu” on page 70).

2.7.1.1 Password Select

An operator may be required to enter a password depending on the user configuration in the BackOffice. This screen enables you to enter a password. For security purposes, the password is not shown as you enter it. Asterisks are used as place markers.

This is an example of the *Password Select* screen:

Enter your password (up to 10 alphanumeric characters) then click the *OK* button to complete the signing on process and display the *Sale* menu (see “Sale Menu” on page 70). Alternatively, click the *Cancel*

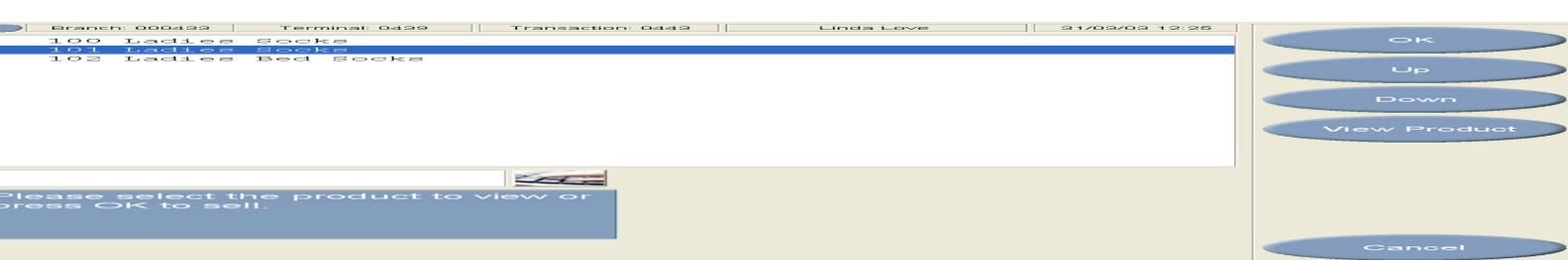


button to cancel the signing on process, and return to the *Sign On* menu (see “Sign On Menu” on page 65).

2.7.2 Product Search

This option enables you to search for a particular product.

1. Enter either:
 - The ID number of the product if known, or partial ID number (up to 20 alphanumeric characters).
 - An approximate description of the product (up to 30 alphanumeric characters).
2. Press the *OK* button to initiate a search of the database. Alternatively, press the *Cancel* button to return to the *Sale* menu.
3. All products which satisfy the criteria input are displayed as follows:
 4. Select the product required by using the *Up* and *Down* buttons.
 5. Press the *OK* button to continue the selling process on the selected product or the *Cancel* button to return to the *Sale* menu. Alternatively, press the *View Product* button to display the details held on the selected product, for example:



The information held on the product is configured in the BackOffice.

6. Press the *OK* button to continue the selling process on the selected product or the *Cancel* button to return to the *Sale* menu. Alternatively press the *View Currency* button to display the price of the product in the various currencies available, for example:

2.7.3 Fuzzy Product Search

This option enables you to search for items by any part of the description. The system does not care about the order in which the information is entered and therefore can be especially useful if there is no common format used in product descriptions. The following two screens are to demonstrate the capabilities of this function. Firstly if the operator enters the characters 'PR O' the system shows the following screen:



As can be seen the system will simply find any products which contain the relevant characters and therefore the 'PRO' is actually matched against the word 'PRODUCT' in all items shown. However, if the user then types in an extra character of 'W' the system will automatically revise the list to appear as follows:

The buttons which are available to the user in this screen are as follows:

- *View Product*

This will enable the product information to be viewed in the same way as outlined earlier.

- *Start Search Now*

The fuzzy product search is configured to be intuitive to what is being typed. However, if this feature is switched off then this button will need to be pressed once the required search criteria have been entered by the user.



- *Reset*

This will clear the fuzzy product search criteria entered to enable a new search to be performed

- *Cancel*

This will cancel the search and return back to the relevant menu from which the search function was selected from (I.e. Sign Off or Operator Functions)

2.7.4 Stock Locator

This option enables you to locate a stock item.

2.7.5 Airport Sale Prompt Workflow

This option enables you to perform the airport sale prompt workflow.

2.7.6 Clock In

This is an example of the *Clock In* screen:

You can either swipe an employee card, or enter the number manually.

Press the *OK* button to initiate the clock in. You will be informed whether the clock in was successful. Alternatively, press the *Cancel* button to cancel the clock in operation and return to the *Sale* menu.

2.7.7 Clock Out

Clock out. It has the same format as the *Clock In* screen (see “Clock In” on page 70).

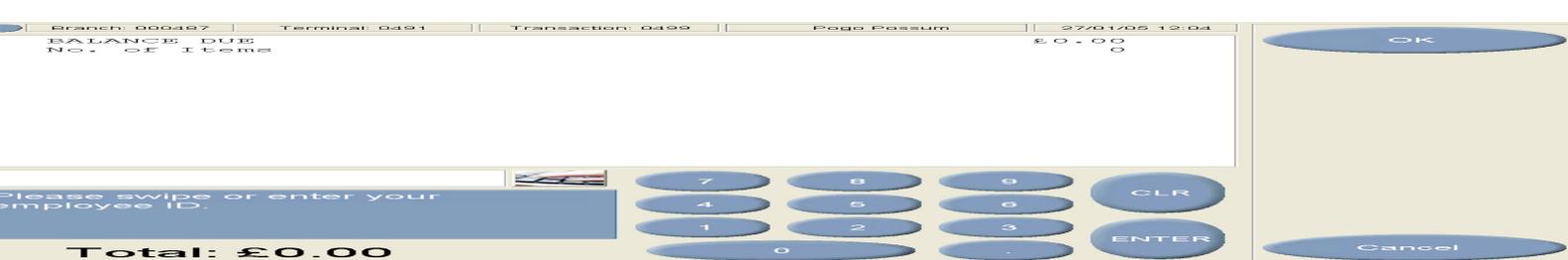
2.7.8 Lock Screen

This option enables you to lock the screen, requiring a sign on to unlock it.

2.8 Sale Menu

2.8.1 Sale Option

This option enables you to perform a sale.



2.8.2 Returns

Display the *Return* menu (see “Return Menu” on page 101).

2.8.3 Voids

Display the *Voids* menu (see “Void Menu” on page 110).

2.8.4 Recall

Display the *Recall* menu (see “Recall Menu” on page 21).

2.8.5 Store

Display the *Store* menu (see “Store Menu” on page 23).

2.8.6 Total

Terminate the sales process when it is complete. The total for the transaction appears on the screen and you are taken to the *Tender* menu. See “Tender Menu” on page 24).

2.8.7 No Sale

This option enables you to perform a no sale action. This simply means that the cash drawer opens. The no sale command can be configured to force you to enter any of the following extra information:

- *Reason*

A reason for the no sale can be selected from a list displayed on the POS.

- *Reference number*

you can be prompted to enter a reference number for the no sale.

- *Authorisation*

The no sale operation must be authorised by another user with the required roles assigned to them in the BackOffice. The authorising user must enter their operator ID and password (usual format).

On completion of this operation, you are returned to the *Sale* menu. This is an example of the receipt produced:

***** NO SALE *****	
TOTAL	£0.00

2.8.8 Orders

Display the *Order* menu (see “Order Menu” on page 119).

2.8.9 MMG Sale

This option enables you to perform an MMG (Merchandise Management Group) sale. This means that the sale is recorded under a department rather than a specific product.

The screen is similar to the *Product Sale* screen (see “Product Sale” on page 73), except the MMG number, rather than the product ID, must be scanned in or entered manually. The MMG number can be

up to 20 alphanumeric characters.

According to how the product is configured, you may be prompted to enter:

- *Quantity*

The quantity should be entered as a number in the range 1-99999. It cannot be negative or zero.

- *Reason Code*

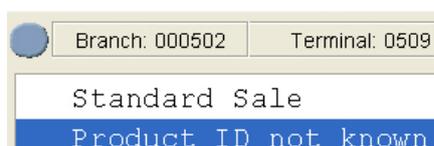
You may be asked for a reason code for the sale. The available reasons are displayed in list, from which you have to select the required one. They are configured in the BackOffice.

Select the reason code for the MMG sale, if required. The following screen is displayed:

The reason codes are displayed in a list.

1. Press the required reason, or navigate the list using the *Up* and *Down* buttons.
2. When the selected reason is highlighted, press the *OK* button to confirm the selection.
3. Enter the price of the item. The price should be entered as a number with no decimal point, or commas etc., e.g. 123 = £1.23. The price will be displayed in a format which is locale dependant.
4. At this point you can either continue with the selling process or use the *Total* button to conclude the selling process. Press the *Total* button will to proceed to the *Tender* menu (see “Tender Menu” on page 24). Alternatively, press the *Cancel* button to cancel the current operation and return to the *Sale* menu.

This is an example of the receipt produced:



2.8.10 MMG Hierarchy Sale

This option enables you to perform an MMG hierarchy sale.

2.8.11 Department Store MMG Sale

This option enables you to perform a department store MMG sale.

2.8.12 Product Sale

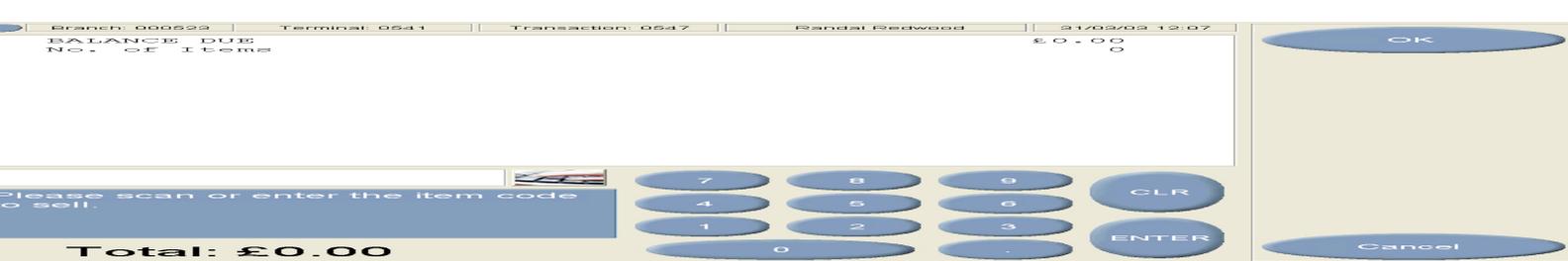
This option enables you to sell a product. This is an example of the *Product Sale* screen:

You can identify the product required by one of the following methods:

- Scan the product ID number.
- Enter the product ID number manually (up to 20 alphanumeric characters).
- Press a button on the POS which has been configured to represent a particular product (product preset sale).

According to how the product is configured, you may be prompted to enter:

- *Price*
The price should be entered as a number with no decimal point, or commas etc., e.g. 123 = £1.23. The price will be displayed in a format which is locale dependant.
- *Quantity*
The quantity should be entered as a number in the range 1-99999. It cannot be negative or zero.
- *Quantity Sale*
This option is used if the product criteria indicate that the quantity must be entered manually.
- *Reason Code*
You may be asked for a reason code for the sale. The available reasons are displayed in list, from



which you have to select the required one (see example in MMG Sale, “MMG Sale” on page 71). They are configured in the BackOffice.

- *Serial Number*

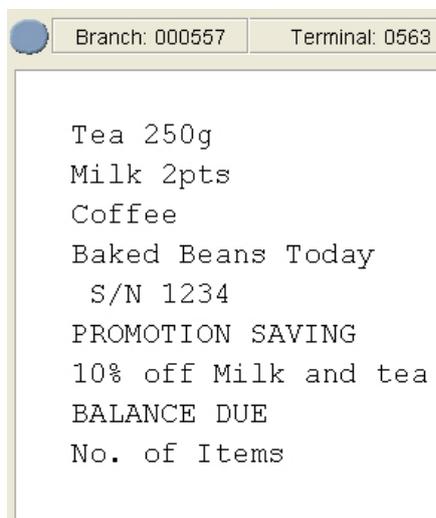
Some products are marked as 'serial number tracked'. In this case you must enter the serial number of the product. The serial number entered will appear on the receipt.

This is an example of the *Product Sale* screen when several items have been sold:

All products which have been sold appear on the screen along with any other relevant information, e.g. promotions, serial numbers (where applicable) etc.

At this point you can either continue with the selling process or use the *Total* button to conclude the selling process. The *Total* button to take you to the *Tender* menu (see “Tender Menu” on page 24).

This is an example of the receipt produced:



2.8.13 Product Keyed Sale

This option enables you to perform a product keyed sale.

2.8.14 Non-Merchandise Sale

This option enables you to sell a non-merchandise product. The format is similar to the *MMG Sale* screen (see “MMG Sale” on page 71). There are a different set of reasons displayed for the non-merchandise sale. The list is configured in the BackOffice. This is an example of the receipt produced:

WINE FESTIVAL 2001	
20% OFF* ALL AUSTRALIAN WINE	
Offer available 25/4 to 8/7	
excludes case deals	

Non Merchandise	1.99

TOTAL	£1.99
Cash	-£20.00
Change	£18.01

2.8.15 Product Preset Sales

This option enables you to sell a product using a button which has been configured to be a specific product. The format is very similar to the *Product Sale* screen (see “Product Sale” on page 73), except you do not have to enter the Product ID.

2.8.16 Customer View

This option enables you to view customer details.

2.8.17 Sell From View

This option enables you to perform a sale from the customer details view.

2.8.18 Promo Voucher Sale

Perform a promotional voucher sale. These vouchers are similar to products in that they are represented as products in the user interface, however, they have no 'sales value' when sold, they only hold a 'value' perceived by the customer. They are sold like any other product in the system.

2.8.19 Dump Code Sale

This option enables you to perform a dump code sale.

2.8.20 Re-Sell Product

This option enables you to re-sell a product that has already been sold.

2.8.21 Sell From Gift List

This option enables you to perform a sale from a gift list.

2.8.22 Product by MMG Search

This option enables you to search for a product by MMG.

2.8.23 Product by MMG Sale

This option enables you to perform a product sale by MMG.

2.8.24 Product Group Search

This option enables you to search for a particular product group. The available product groups are displayed in a list from which you can select the required group. The following screen is then displayed:

Select the required product by using the *Up* and *Down* buttons. When the product has been highlighted, you have the following options:

- Press the *View Product* button to view details on the product (see “Product Search” on page 67). You then has the option of selling the product (as below), viewing the currency (shows the price of the product in each available currency), or cancelling the operation (you will be returned to the previous screen).
- Press the *Sell Product* button to sell the selected product. You will be returned to the *Sale* menu.
- Press the *Cancel* button to cancel the Search Product Group operation and you will be returned to the *Sale* menu.

2.8.25 Locate Product Inventory

This option enables you to locate product inventory.

2.8.26 Remote Customer Products Sale

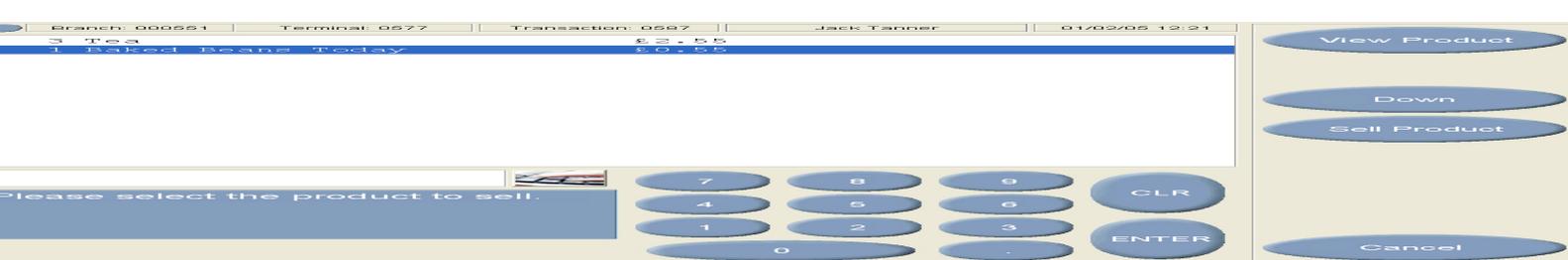
This option enables you to perform a product sale to a remote customer.

2.8.27 Free Text Entry

This option enables you to enter any text.

2.8.28 Gift Voucher Sale

This option enables you to sell various types of gift voucher to the customer. This is an example of the *Gift Voucher* screen:



The available types of gift vouchers, as configured in the BackOffice, are displayed in a list.

1. Navigate the list either by pressing on the required reason, or by using the *Up* and *Down* buttons.
2. When the selected gift voucher type is highlighted, press the *OK* button to confirm the selection. Alternatively, press the *Cancel* button to cancel the current operation and return to the *Sale* menu (see “Sale Menu” on page 70).
3. According to how the gift voucher is configured, you will be prompted to enter some or all of the following data:
 - *Price*

The price should be entered as a number with no decimal point, or commas etc., e.g. 123 = £1.23. The price will be displayed in a format which is locale dependant.
 - *Quantity*

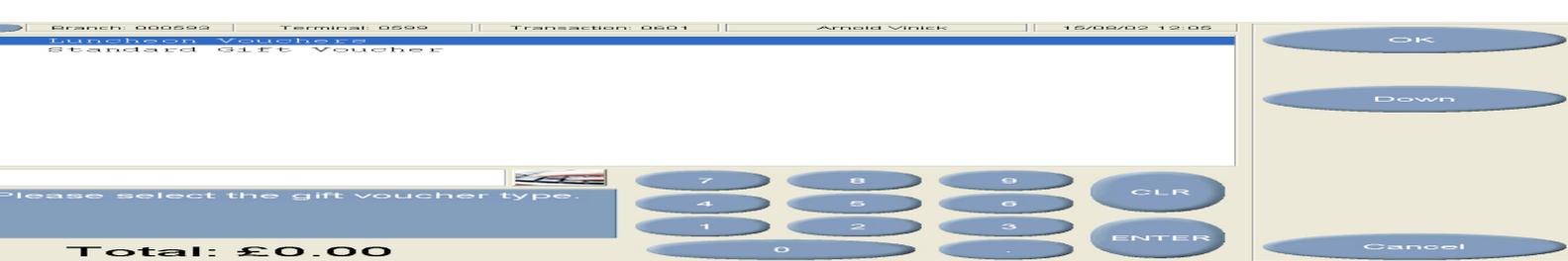
The quantity should be entered as a number in the range 1-99999. It cannot be negative or zero.
 - *Serial Number*

Some gift vouchers are marked as 'serial number tracked'. In this case you must enter the serial number of the gift voucher. The serial number entered will appear on the receipt. If the serial number is not in the database, you can opt to sell the gift voucher anyway.
 - *Force Capture Name Address*

You may be prompted to enter the name and address of the customer who is buying the gift voucher (format as for Enter Address, see “Capture Name and Address” on page 117).
 - *Endorse at time of issue*

You may have to endorse the gift voucher when it is issued.
 - *Print at POS at time of Sale*

The gift voucher may just be generated at the POS on the attached printer at the time of



sale. The format is configured in the BackOffice.

- *Open Drawer On Issue*

This means that the cash drawer will open when the gift voucher is issued at the POS.

- *Maximum Value*

The gift voucher may have a maximum amount specified.

4. You are then prompted to enter the amount of gift vouchers required. The amount must be entered in a whole number with no decimal point, e.g. 123 for £1.23. The system will convert the price to the correct format according to the currency being used. The amount may need to be a whole number of denominations.

Gift vouchers may also be configured to be serial number tracked. In this case you are prompted to enter the serial number, either by scanning it, or entering it manually.

5. Press the *OK* button to complete the gift voucher sale and return to the *Sale* menu. Alternatively, press the *Cancel* button to cancel the current gift voucher sale and return to the *Sale* menu.

This is an example of the receipt produced (the second voucher is serial number tracked):

Gift Voucher 2	5.00
Gift Voucher 2	10.00
S/N: 0001000100000000	£10.00

TOTAL	£15.00
Cash	-£15.00

This is an example of the receipt produced by the POS printer:

```

G I F T   V O U C H E R

      0001000100000008

VALUE                               £10.00
      ** TEN POUNDS ONLY **

This Gift Voucher may be used to
purchase merchandise at any store in
the UK. Please note change may be given
in gift vouchers.

13/02/04 13:07 000001 0001 0154   jo
  
```

2.8.29 Rechargeable Voucher Top Up

This option enables you to top up a rechargeable voucher.

2.8.30 Rechargeable Voucher Cancel

This option enables you to cancel a rechargeable voucher.

2.8.31 Rechargeable Voucher Enquiry

This option enables you to perform a rechargeable voucher enquiry.

2.8.32 Rechargeable Voucher History

This option enables you to display the history of a rechargeable voucher.

2.8.33 Rechargeable Voucher Merge

This option enables you to merge two rechargeable vouchers into a single rechargeable voucher.

2.8.34 Rechargeable Voucher Type Sale

This option enables you to sell rechargeable vouchers to the customer. Rechargeable vouchers are cards to which money can be added and then used for payment, thereby decreasing the amount of money left on the card. This option enables you to either issue a new card or add money to an existing card. This is an example of the *Rechargeable Voucher* screen:

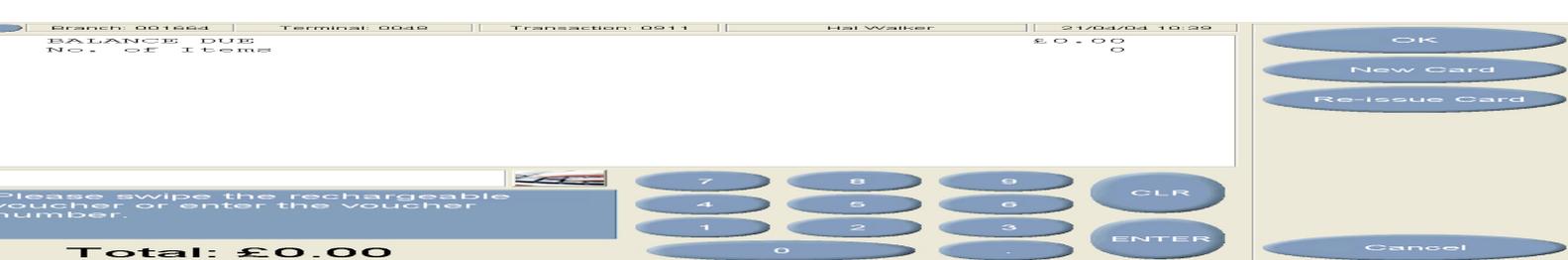
Press the *OK* button to add money to an existing rechargeable voucher. You must enter the same details as for *New Card*.

Press the *New Card* button to issue a new card to the customer. You will be prompted to enter the following:

- Voucher number
- Expiry date
- Initial value of the new voucher, i.e. how much money is being added to the new card. The amount must be entered in a whole number with no decimal point, e.g. 123 for £1.23. The system will convert the price to the correct format according to the currency being used. The amount may need to be a whole number of denominations.
- The customer's name and address

Press the *Re-issue Card* button to issue a new card to the customer. Any existing balance on the old card will be automatically transferred to the new card. You will be prompted to enter the following:

- The original voucher number (you can use a search facility by customer name/postcode to locate the required voucher)
- The new voucher number



- Voucher number
- Expiry Date
- Initial value of the new voucher
- The customer's name and address.

Press the *Cancel* button to cancel the current operation and return to the *Sale* menu.

According to how the rechargeable voucher is configured, you may be prompted to enter some or all of the following data:

- *Serial Number*

Some rechargeable vouchers are marked as 'serial number tracked'. In this case you must enter the serial number of the rechargeable voucher. The serial number entered will appear on the receipt. If the serial number is not in the database, you can opt to sell the rechargeable voucher anyway.

- *Force Capture Name Address*

You may be prompted to enter the name and address of the customer who is buying the rechargeable voucher (format as for Enter Address, see "Capture Name and Address" on page 117).

- *Open Drawer On Issue*

This means that the cash drawer will open when the rechargeable voucher is issued at the POS.

- *Maximum Value*

The rechargeable voucher may have a maximum amount specified.

- *Card Type*

The type of card associated with the rechargeable voucher.

Rechargeable vouchers may also be configured to be serial number tracked. In this case you are prompted to enter the serial number, either by scanning it, or entering it manually.

Press the *OK* button completes the sale of the rechargeable voucher(s) and return to the *Sale* menu. Alternatively, press the *Cancel* button to cancel the current rechargeable voucher sale and return to the *Sale* menu.

This is an example of the receipt produced:

Rechargeable Voucher	80.00
6340010036171085	
TOTAL	£80.00
Cash	-£80.00

2.8.35 Promotional Rechargeable Voucher

This option enables you to perform promotional rechargeable voucher functions.

2.8.36 Multiple Points Enquiry

This option enables you to perform a multiple points enquiry.

2.8.37 Issue Loan Item

This option enables you to issue a product on loan to a customer. First enter the Product ID of the product to be loaned, followed by the deposit required (if any). Depending on how the product is configured, you may also be prompted for a reason code.

This is an example of the receipt produced:

Loan	
Mug	
Deposit	0.40
Loan Reason 1	

TOTAL	£0.40
Cash	-£1.00
Change	£0.60

00000100010171050131115735	

2.8.38 Return Loan Item

This option enables you to return an item which was previously on loan. This is an example of the *Return Loan Item* screen:

1. Locate the required loan via one of the following methods:
 - Enter the loan number and press the *OK* button.
 - Press the *Recall by Transaction* button to select the transaction required by scanning in or manually entering a full transaction number, i.e. including branch, terminal and transaction numbers.
 - Press the *Recall by Customer* button to select the customer required by entering the name of the customer.
2. Press the *OK* button to confirm it is the required loan.



3. Enter the amount of the deposit to be refunded. This defaults to the original amount of the deposit, although you can change it.

This is an example of the receipt produced:

Return Loan	
Mug	
Refund Deposit	-0.40
Loan Reason 1	

TOTAL	-£0.40
Cash	£0.40

00000100010198050203125624	

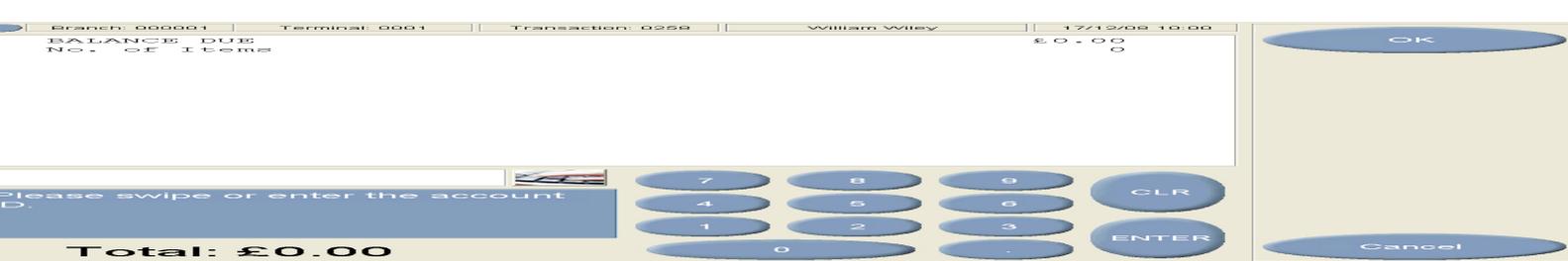
2.8.39 Account Payment

This option enables you to make a payment to a customer account. The operation is only allowed providing the customer has enough funds in their account to cover the cost of the transaction. This is an example of the *Account Payment* screen:

1. Swipe (or enter manually) the account card and press the *OK* button.
2. Enter the amount of the debit, either by pressing the *Amount* button or entering the amount manually.
3. You will then be returned to the *Sale* menu to continue with the transaction.

The operation can be cancelled at any time by pressing the *Cancel* button.

This is an example of the receipt produced:



Account Payment	10.00
Account Number: 6356505553016150	

TOTAL	£10.00
Cash	-£10.00

00000100010150050126132422	

2.8.40 Account Withdrawal

This option enables you to make a withdrawal from a customer account, i.e. one maintained by the retailer. The operation is only allowed providing the customer has enough funds in their account to cover the cost of the withdrawal. It has a similar format to the *Account Payment* screen (see “Account Payment” on page 82).

1. Manually enter or swipe the account ID. The amount of the withdrawal required should then be entered. The amount should be entered as a number with no decimal point, or commas etc., e.g. 123 = £1.23. The amount will be displayed in a format which is locale dependant.
2. Press the *OK* button to continue with the withdrawal. Alternatively, press the *Cancel* button to abort the operation.

This is an example of the receipt produced:

Account Withdrawal	-20.00
Account Number: 6356505553016150	

TOTAL	-£20.00
Cash	£20.00

00000100010152050126134208	

2.8.41 Pay Local Account

This option enables you to make a payment into a local account.

To select the required account:

1. Swipe the account card or manually input the account ID. When the account is located, the following screen is displayed:

2. Press the *OK* button to confirm the customer details. You are then prompted to enter the amount of the payment. The amount should be entered as a number with no decimal point, or commas, e.g. 123 = £1.23. The price will be displayed in a format which is locale dependant. You are then returned to the *Sale* menu.

Alternatively, press the *Cancel* button to cancel the request and return to the *Sale* menu.

This is an example of the receipt produced:



2.8.42 Deposit Payment

This option enables you to accept a deposit payment on a customer account.

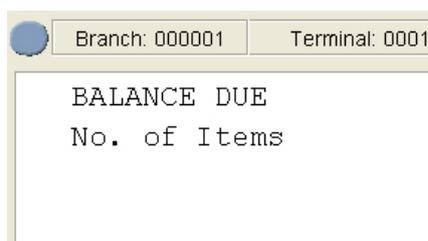
This is an example of the *Deposit Payment* screen:

Identify the customer account using one of the following methods:

- Swipe the customer account card
 - Manually enter the customer account card number. The loyalty card number can be up to 20 alphanumeric characters.
 - Search the database for the customer's name or postcode. The name must no be more than 20 alphanumeric characters. You do not need to specify the whole name just a partial name can be entered. The results are displayed on this screen, in a list from which you can select the required customer. You can navigate the list using the *Up* and *Down* buttons.
1. Press the *OK* button to display the customer details.
 2. Press the *OK* button to confirm the selection.
 3. Enter the amount required for the deposit payment.

Press the *Cancel* button to return to the *Sale* menu without the loyalty account/card information being used.

This is an example of the receipt produced:



2.8.43 Undo

Cancel the last operation performed, e.g. press the *Undo* button to cancel the last sales command.

2.8.44 Redo

Re-perform the last operation that was cancelled by an undo, e.g. press the *Redo* button and the last sales transaction which was undone is restored.

2.8.45 Modify Quantity

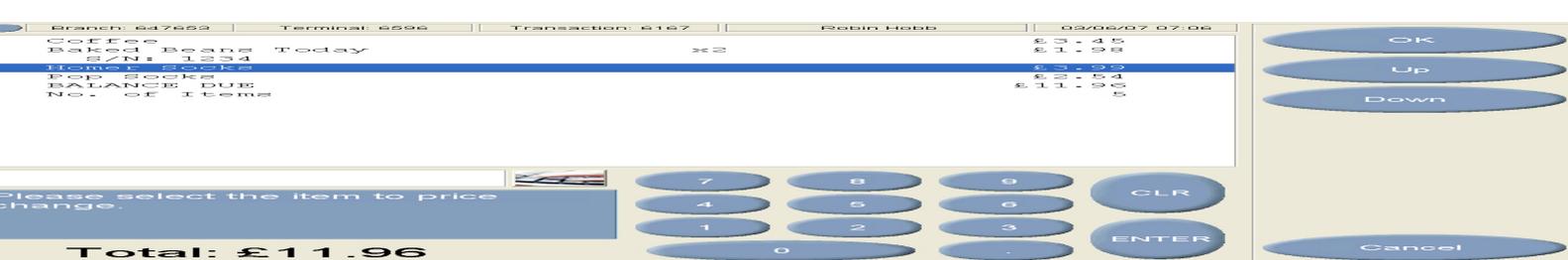
This option enables you to modify an existing quantity.

2.8.46 Price Override

This option enables you to override the price which is stored for a particular item. The alteration only applies once and does not change the price permanently. This is an example of the *Price Override* screen:

1. Select the item to be changed by navigating the list using the *Up* and *Down* buttons.
2. Press the *OK* button to select the required item. Alternatively, press the *Cancel* button to cancel the price override operation and return to the *Sale* menu (see “Sale Menu” on page 70).
3. Enter the new price of the item. The price should be entered as a number with no decimal point, or commas, e.g. 123 = £1.23.
4. A reason for the override must be selected from a list, which is configured in the BackOffice. You are not able to continue with the operation until an authorising operator ID and password (usual format) is also entered.

This is an example of the receipt produced:



Coffee	3.45
Baked Beans Today x 2	1.98
S/N: 111	
Homer Socks	1.23
Price Override (3.99)	1.23
302 Managers discretion	
Pop Socks	2.54

TOTAL	£9.20
Cash	-£9.20

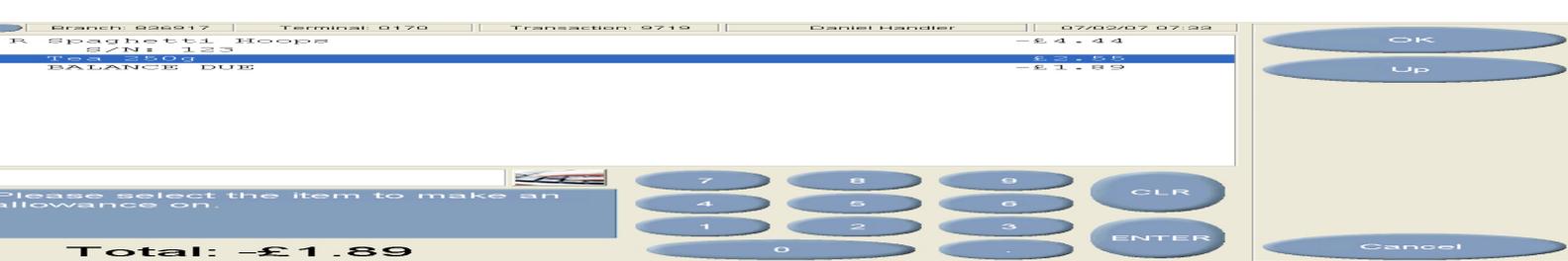
On completion of the price override operation, you are returned to the *Sale* menu (see “Sale Menu” on page 70).

2.8.47 Allowance

This option enables you to make a price allowance on a price already entered in the selling process. This may be used by the store manager to make a one-off price reduction. This is an example of the *Allowance* screen:

1. Select the item on which the allowance is to be made by using the *Up* and *Down* buttons.
2. Press the *OK* button to confirm your selection.
3. Enter the unit allowance amount. This means the amount by which the price is to be reduced in the appropriate tender. The amount must be entered in a whole number with no decimal point, e.g. 123 for £1.23.
4. Select the reason for the allowance from a list, which is configured in the BackOffice.

This is an example of the receipt produced:



Coffee	2.95
Allowance	-0.50
400 Allowance due to dam	

TOTAL	£2.95
Cash	-£2.95

You could have earned 20 points.	

On completion of the allowance operation, you are returned to the *Sale* menu (see “Sale Menu” on page 70).

2.8.48 Item Discount

This option enables you to make a discount on a particular item already entered in the selling process. The item, on which the discount is to be made, is selected from a list of all the current items which have been sold. It is similar to the *Price Override* screen (see “Price Override” on page 86).

A reason for the item discount must be selected from a list, which is configured in the BackOffice. The reasons can affect the change automatically, i.e. 10% off, would make the adjustment and return you to the *Sale* menu (see “Sale Menu” on page 70). If it is not done automatically, then you must enter the amount of the discount, i.e. how much the item is to be reduced.

The amount should be entered as a number with no decimal point, or commas etc., e.g. 123 = £1.23. You are not able to continue with the operation until an authorising operator ID and password (usual format) is also entered. This is an example of the receipt produced:

Mens Socks	1.99
Tea 250g	2.29
Discount (2.55 @ 10%)	-0.26
500 10% Off	
Ladieswear	3.98

TOTAL	£8.26
Cash	-£10.00
Change	£1.74

On completion of the item discount operation, you are returned to the *Sale* menu (see “Sale Menu” on page 70).

2.8.49 Modify Item Tax

This option enables you to modify a tax item.

2.8.50 Modify Transaction Tax

This option enables you to modify a the tax on a transaction.

2.8.51 Tender Exchange

This option enables you to perform an exchange as part of a tender.

2.8.52 Telephone Sale

This option enables you to perform a telephone sale

2.8.53 Offline Sale

This option enables you to perform an offline sale

2.8.54 Product Wastage

This option enables you to perform product wastage functions.

2.8.55 Product Movement

This option enables you to perform product movement functions.

2.8.56 Dispatch

This option enables you to perform a dispatch.

2.8.57 Convert Sale To Dispatch

This option enables you to convert a sale to a dispatch.

2.8.58 Convert Dispatch To Sale

This option enables you to convert a dispatch to a sale.

2.8.59 Restart Airport Sale

This option enables you to restart an airport sale.

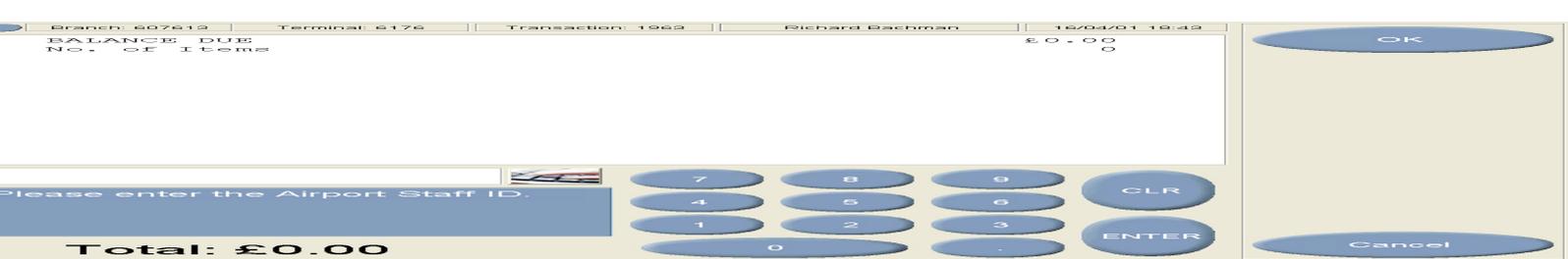
2.8.60 Cancel Airport Sale

Cancel the current airport sale during an airport sale transaction.

2.8.61 Airport Staff Sale

This option enables you to perform a sale against an airport staff member. This is an example of the *Airport Staff Sale* screen:

1. Enter the ID of the required airport staff member, either by swiping a card, or manually entering the number.



2. Press the *OK* button to return to the *Sale* menu (see “Sale Menu” on page 70) to perform the transaction for the airport staff.

This is an example of the receipt produced:

Layaway Number: LA000100010155		
Customer Number: 000002		
Test Customer		
Retail-J		
Cambridge House		
6 Bluecoats Avenue		
Hertford		
Herts		
SG141PB		
UK		

Milk 2pts	x 1	1.49
Tea	x 1	2.55
Baked Beans Today	x 1	0.99
S/N: 45324763		
SUB TOTAL		5.03

You have saved/earned:		
10% off Milk and tea		-0.40

TOTAL		£4.63
Cash		-£5.00
Change		£0.37

You could have earned 25 points.		

00000100010155050127095218		

Press the *Cancel* button to return to the *Sale* menu (see “Sale Menu” on page 70) without the airport staff sale being instigated.

2.8.62 Top-Up Balance

This option enables you to display the balance of an E Top-up (mobile phone) card.

Enter the E Top-up card number. This can be done manually or by swiping the card. The balance is then displayed on the screen, for example:

Press the *OK* button to return to the *Sale* menu.

2.8.63 Top-Up Card Sale

This option enables you to sell a mobile telephone top-up card.

2.8.64 Top-Up Card Return

This option enables you to perform a mobile telephone top-up card return.

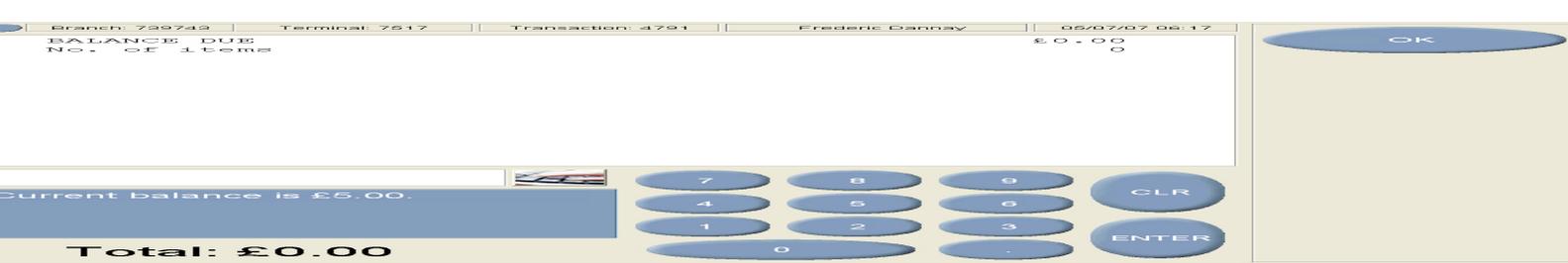
2.8.65 Employee Sale

This option enables you to perform a sale against a specific employee which includes an automatic discount. Discounts allowed for a particular employee and employee discounts according to particular products are configured in the BackOffice.

An employee sale will prompt for an employee reason code and an employee and then apply the discounts set up in the BackOffice. The *earned* discount is normally the higher rate and is applied as long as there is discount balance left on the employee's account (or if the balance is not used). The *normal* discount is used for when the employee has no balance left. The discount is applied to all products.

The employee discount balance (allowance) can be configured to be updated with the discount value given so that the overall amount of discount can be controlled. If the discount balance available is less than the discount amount then the percentage given is reduced to the value available.

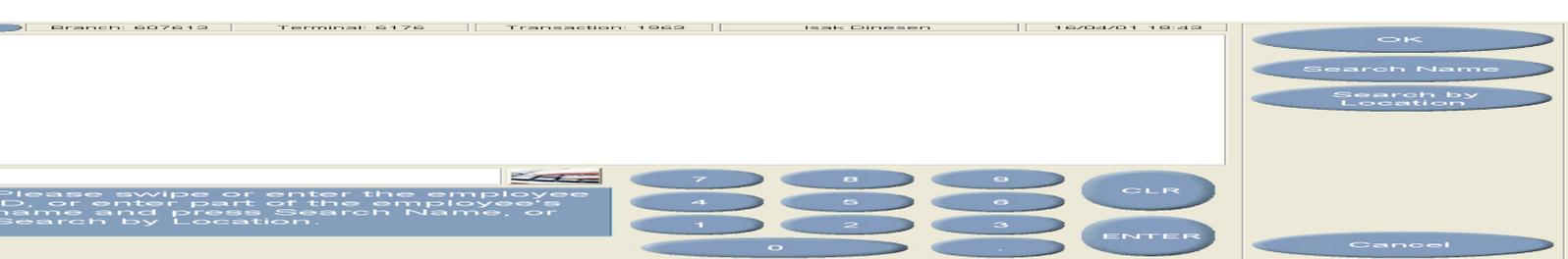
The employee's signature may be required on a slip. If the employee sales require a reason, as configured in the BackOffice, the following screen will be displayed before the employee sale can go ahead:



1. Use the *Up* and *Down* buttons to select to required reason.
2. Press the *OK* button to select the highlighted reason. The following screen will be displayed:

Alternatively, press the *Cancel* button to return to the previous *Sale* menu.

3. Select the required employee using one of the following options.
 - Swipe the employee's ID card and press the *OK* button.
 - Enter the employee ID (up to 20 alphanumeric characters) and press the *OK* button.
 - Press the *Search Name* button to search the database for the employee's name (up to 20 alphanumeric characters). You do not need to specify the whole name just a partial name can be entered. The results are displayed on this screen, in a list from which you can select the required employee. You can navigate the list using the *Up* and *Down* buttons.



- Press the *Search by Location* button. This enables you to view all employees at the current location. The results are displayed in a list from which you can select the required employee. You can navigate the list using the *Up* and *Down* buttons. You can also change the location for the search at this point using the *Select Other Location* button.
4. Press the *OK* button to display the employee details.
 5. Press the *OK* button to confirm the selection and return to the *Sale* menu to perform the transaction for the selected employee. Alternatively, press the *Cancel* button to return to the *Sale* menu without the employee sale being instigated.

This is an example of the receipt produced:

***** Employee Sale *****	

Employee ID:	000003
Mrs Susan Pearson	
Account Starting Balance:	42.00

Tea 250g	5.10
x 2	
Biological Washing P	4.25
SUB TOTAL	9.35

You have saved/earned:	
10% off Milk and tea	-0.51

TOTAL	£8.84
Cash	-£10.00
Change	£1.16

You could have earned 3 points.	

Account Remaining Balance:	42.00

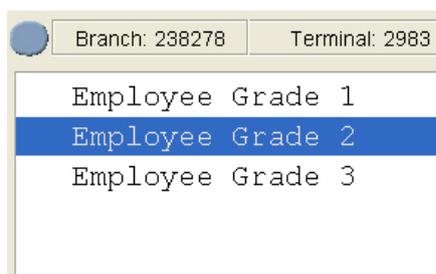
2.8.66 Employee Grade Sale

This option enables you to perform a sale against a particular employee grade. A percentage line discount is applied automatically to each item in the transaction according to the settings configured in the BackOffice. Items that are not eligible are skipped. This is an example of the *Employee Grade Sale* screen:

All available employee grades are displayed.

1. Select the required employee grade using the *Up* and *Down* buttons.
2. Press the *OK* button to return to the *Sale* menu to perform the transaction for the selected employee grade. Alternatively, press the *Cancel* button to return to the *Sale* menu without the employee sale being instigated.

This is an example of the receipt produced:



2.8.67 Simple Employee Sale

This option enables you to perform a simple employee sale, i.e. it simply captures the employee details. It does not apply special discounts. All normal discounts are available. The format is very similar to the *Employee Sale* screen (see “Employee Sale” on page 91). This is an example of the receipt produced:

```

-----
***** Employee Sale *****
-----
Employee ID: 000002
Miss Rachel Jenkins
Account Starting Balance: 14.40
-----
Pre-Order Product          1.99
Baked Beans Today          0.99
S/N: 1234
-----
TOTAL                      £2.98
Cash                       -£3.00
Change                     £0.02
-----
Account Remaining Balance: 14.40
-----

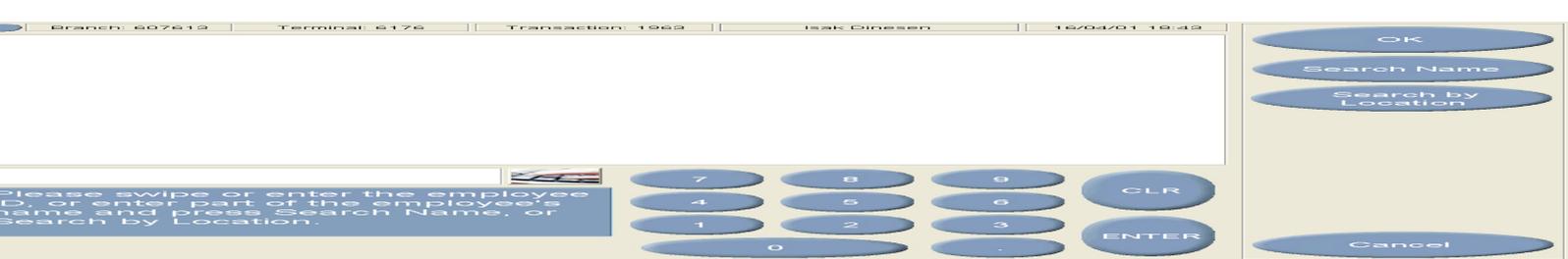
```

2.8.68 Employee Grade Discount At Total

This option enables you to apply a discount to an employee grade sale. It can only be selected *before* a transaction is created. An employee grade discount sale will prompt for an employee reason code and employee and then apply the discounts in the employee grade details that are pointed to by the employee record.

The discounts are added as line item discounts when the total key is pressed according to the percentages set up for the products in the employee grade details. Items that are not eligible for discount are skipped. The employee's signature may be required on a slip. This is an example of the *Employee Grade Discount at Total* screen:

1. Select the required employee using one of the following options.
 - Swipe the employee's ID card and press the *OK* button.
 - Enter the employee ID (up to 20 alphanumeric characters) and press the *OK* button.
 - Press the *Search Name* button to search the database for the employee's name (up to 20 alphanumeric characters). You do not need to specify the whole name just a partial name can be entered. The results are displayed on this screen, in a list from which you can select



the required employee. You can navigate the list using the *Up* and *Down* buttons.

- Press the *Search by Location* button. This enables you to view all employees at the current location. The results are displayed in a list from which you can select the required employee. You can navigate the list using the *Up* and *Down* buttons. You can also change the location for the search at this point using the *Select Other Location* button.
2. When you have identified the required employee you will be returned to the *Sale* menu to continue with the transaction. The transaction is classed as an employee sale.

The discount is not applied until the *Total* button is pressed.

This is an example of the receipt produced:

***** Employee Sale *****	
Employee ID: 000002	
Miss Rachel Jenkins	
Personal CD Player	35.99
Discount (39.99 @ 10%)	-4.00
Employee Grade Discount	
Ladies Socks x 2	5.38
Discount (5.98 @ 10%)	-0.60
Employee Grade Discount	
Mens socks 6-11	3.79
Discount (3.99 @ 5%)	-0.20
Employee Grade Discount	
TOTAL	£45.16
Cash	-£60.00
Change	£14.84

2.8.69 Cash Management

Display the *Cash Management* menu (see “Cash Management” on page 55).

2.8.70 Manager Functions

Display the *Manager* menu (see “Manager” on page 44).

2.8.71 Populate Data

Initialise the database with test data. This inserts a small selection of products, terminals, stores etc., which will enable the system to run.

This should not be done during normal day-to-day operation.

2.8.72 Reload Config

Reload the configuration file for a particular terminal without having to restart the application. This may be required when a configuration change has just been performed in the store BackOffice or estate manager.

2.8.73 Display Stored Basket Messages

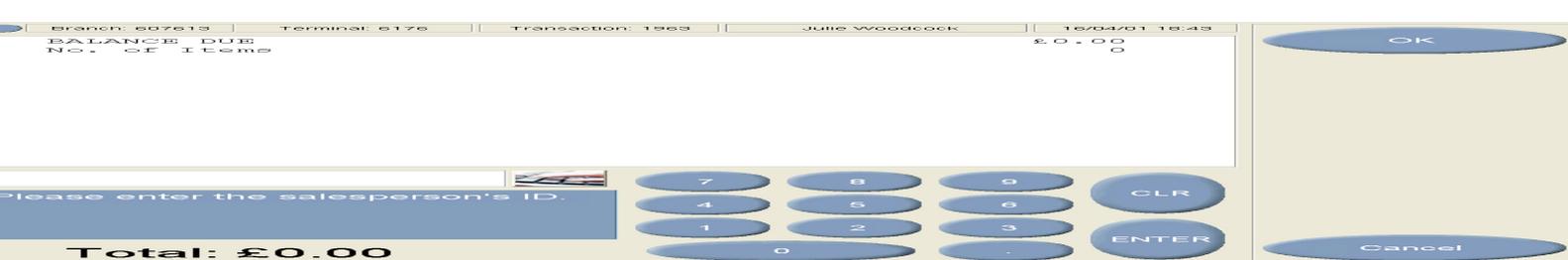
This option enables you to examine the unacknowledged system messages which have been generated on the terminal, e.g. in the event of a server failure, and enables you to resend some or all of the messages when the system has recovered. This screen displays all the unacknowledged System Messages. This is an example of the *System Messages* screen:

Select the required system message by using the *Up* and *Down* buttons to highlight the message. You then have the following options:

- Press the *OK* button to display the *View System Message* screen (see “View System Message” on page 97).
- Press the *Resend Select* button to resend the selected message (see “Resend Selected Message” on page 98).
- Press the *Resend All* button to resend every message (see “Resend All Messages” on page 98).
- Press the *Cancel* button to cancel the *Display Stored Basket Messages* function return to the *Sale* menu (see “Sale Menu” on page 70).

2.8.73.1 View System Message

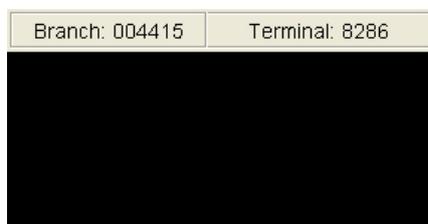
This screen displays the selected unacknowledged system message. This is an example of the *View System Message* screen:



1. Enter the ID of the required salesperson (up to 20 alphanumeric characters).
2. Press the *OK* button to return to the *Sale* menu with the selected salesperson's name highlighted on the POS display, for example:

Alternatively, press the *Cancel* button to cancel the current set salesperson option and return to the *Sale* menu.

The receipt produced by the set salesperson option will include the salesperson's name. This is an example of the receipt produced:



2.8.77 Clear Salesperson

Cancel the current salesperson sale. All sales made at the POS following the *Set Salesperson* command will continue to be associated with the selected salesperson until the *Clear Salesperson* command is used.

2.8.78 Manual Promotion

This option enables you to perform a manual promotion.

2.8.79 Select Promotion

This option enables you to select a promotion.

2.8.80 Switch MenuSet

This option enables you to change the menu set. Menu sets are defined in the BackOffice.

2.8.81 Sell From External Transaction

This option enables you to perform a sale from an external transaction.

2.8.82 User Biometric Registration

This option enables you to sign on using biometric registration.

2.8.83 Edit Menu

This option enables you to edit a menu.

2.8.84 Tax Refund

This option enables you to perform a tax refund.

2.9 Return Menu

2.9.1 Product Quantity Return

This option enables you to perform a product quantity return.

2.9.2 Product Preset Returns

This option enables you to return a particular product by using a dedicated button. The button is configured in the BackOffice. It is of similar format to the *Product Return* screen (see

Product Return

), except you do not have to enter the Product ID. This is an example of the receipt produced:

R Baked Beans Today	x -1	-0.99
S/N: 2521523		

TOTAL		-£0.99
Cash		£0.99

00000100010176050202101948		

2.9.3 Product Item Return

This option enables you to simply return an item returned by the customer. The format is the same as for selling the item, except the price appears on the screen as a negative number. A reason for the return may be selected from a list, which is configured in the BackOffice.

Whether you are authorised to perform the return, or whether an authorising operator ID and password (usual format) is required, is configured in the BackOffice. On completion of this operation, you are returned to the *Sale* menu (see “Sale Menu” on page 70).

The returned item appears on the receipt with the letter R to the left of it to signify that the product was returned. The receipt also shows the reason for the return (if any defined). These options are configured in the BackOffice. This is an example of the receipt produced:

R Milk 2pts	x -1	-1.49
205 Return For Disposal		

TOTAL		-£1.49
Cash		£1.49

2.9.4 Exchange Item

Enables you to exchange an item which has already been sold for a replacement. It is used for performing an exchange of a product without the original receipt. This is where an item is returned and this causes the same item to be automatically sold.

1. Scan the product or enter the Product ID which is being returned. You will then be prompted for the price and quantity, regardless of how the product is configured.
2. Then enter the Product ID of the replacement product.

This must be the same product ID as the returned item.

You are then returned to the *Sale* menu to complete transaction as required.

This is an example of the receipt produced:

R Tea	x -1	-2.55
Tea		2.55
TOTAL		£0.00
00000100010168050131103807		

2.9.5 Exchange From Order Item

This option enables you to perform an exchange from a customer order item.

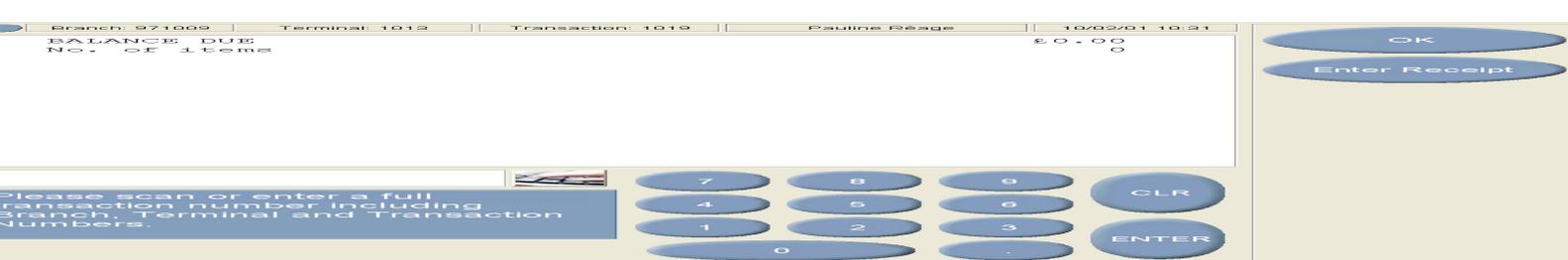
2.9.6 Return From Original Receipt

This option enables you to return an item or items, from a receipt from a customer. This is an example of the *Receipt Return* screen:

You have the following options at this point:

- Enter a full transaction number. This means a 14 digit number which consists of the branch number (6 digits), followed by the terminal number (4 digits), followed by the transaction number (4 digits). They must be entered with *no* gaps between each number, e.g. 08006600010008. These details can be found on the customer's receipt. Alternatively, scan the barcode from the receipt using the scanner.
- Enter the complete details from the receipt which the customer has returned. You are taken to the *Receipt Details* screen (see "Receipt Details" on page 104).

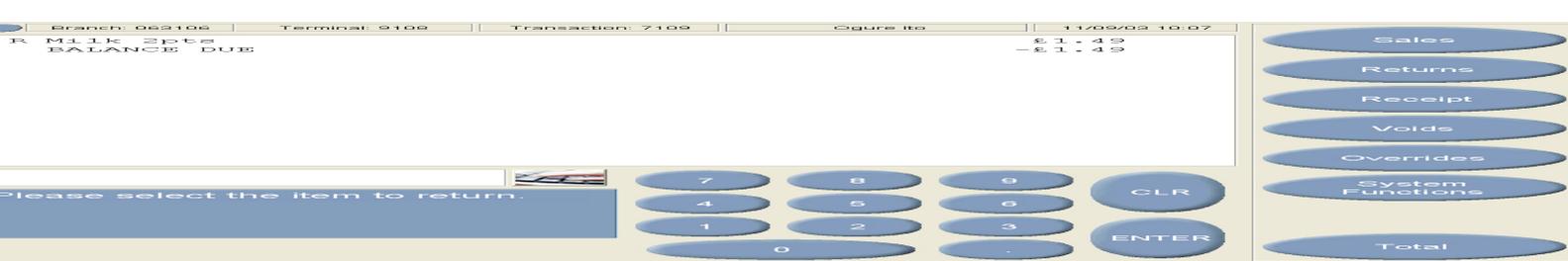
The terminal then recalls the required transaction and you can select the required item to be returned. This is an example of the screen at this stage:



1. Navigate the transaction list by using the *Up* and *Down* buttons.
2. Press the *OK* button to confirm the selection. Alternatively press the *Cancel* button to cancel the return and return to the *Return* menu (see “Return Menu” on page 101).
3. When you have selected the item to be returned, enter the price of the item. The price must be entered as a whole number with no decimal point, e.g. 123 for £1.23. The system will convert the price to the correct format according to the currency being used.

You may also be prompted to enter a reason code which is configured in the BackOffice. You are not able to continue with the operation until an authorising operator ID and password (usual format) is also entered. The following screen is then displayed:

4. Continue with the transaction, either selling more items or not.
5. Press the *Total* button to end the selling/returns process, and proceed to the *Tender* menu (see “Tender Menu” on page 24).



The receipt has the same format as the Return Item receipt. More than one product may be returned from a receipt at different times. In this case the items that have already been returned with the receipt are highlighted. This is an example of what the screen will show in this case:

Coffee	£3.45
Double Cream	£0.79
Tea 250g	£2.55
Milk 2pts	£1.49
Spaghetti Hoops	£0.75
S/N: 1234	
Cash	-£10.00
Change	£1.37
PROMOTION SAVING	
10% off Milk and tea	-£0.40
BALANCE DUE	£0.00
Returns History	
Double Cream	-£0.79
05/09/02 09:42 080066 0001 0085 5	
Spaghetti Hoops	-£0.75
05/09/02 09:43 080066 0001 0086 5	

An item that has already been returned cannot be returned a second time.

2.9.6.1 Receipt Details

This screen enables you to enter the receipt details from an original receipt. This is an example of the *Receipt Details* screen:

The fields are:

- *Original branch number*
This must be a numeric value of six characters.
- *Original terminal number*
This must be a numeric value of four characters.
- *Original transaction number*
This must be a numeric value of four characters.

- *Original transaction date*

This must be in the format dd/mm/yy, or dd/mm/yyyy is also acceptable.

- *Original cashier number*

This is the number of the cashier who originally performed the transaction. It can be up to 20 alphanumeric characters.

- *Original salesperson*

This is the ID of the salesperson who originally performed the transaction. It can be up to 20 alphanumeric characters.

Press the *OK* button to return to the next stage of the receipt return process (see “Return From Original Receipt” on page 102). Alternatively, Press the *Cancel* button to cancel the current receipt return process and return to the *Sale* menu (see “Sale Menu” on page 70).

2.9.7 Receipt Exchange

This option enables you to perform an exchange of a product, with the original receipt. This is where an item is returned and this causes the same item to be automatically sold.

This has a very similar format to the *Return from Original Receipt* screen (see “Return From Original Receipt” on page 102). The only difference being that the returned product is automatically resold. This is an example of the receipt produced:

R Tea	x -1	-2.30
Original tender: Cash		
10% off Milk and tea		-0.25
Tea		2.30
10% off Milk and tea		-0.25
SUB TOTAL		0.50

You have saved/earned:		

TOTAL		£0.00

00000100010195050203105825		

2.9.8 Home Delivery Return

This option enables you to perform a return of a home delivery item.

2.9.9 Gift Receipt Return

This option enables you to perform a return from a gift receipt.

2.9.10 MMG Return

This option enables you to perform an MMG (Merchandise Management Group) return. This means that the returned product is entered into the system under its department number. It is of a similar format to other returns screens.

A reason for the return can be selected from a list, which is configured in the BackOffice. The reason will be printed on the final receipt. You will be returned to the *Sale* menu (see “Sale Menu” on page 70) on completion. This is an example of the receipt produced:

Detergents	-23.45
Standard MMG Return	

TOTAL	-£23.45
US Dollars	¢32.19
Rate: \$1.37/£	£23.45

2.9.11 MMG Hierarchy Return

This option enables you to perform an MMG hierarchy return.

2.9.12 Department Store MMG Return

This option enables you to perform a department store MMG return.

2.9.13 Non-Merchandise Return

This option enables you to perform a non-merchandise return. It is of a similar format to other returns screens. A reason for the return can be selected from a list, which is configured in the BackOffice. You will be returned to the *Sale* menu (see “Sale Menu” on page 70) on completion. This is an example of the receipt produced:

R Non Merchandise	x -1	-23.54

TOTAL		-£23.54
Card		£23.54

2.9.14 Deposit Refund

This option enables you to refund a deposit previously accepted from a customer. The format is similar to the *Account Payment* screen (see “Account Payment” on page 82), where the required customer is identified either by their account number or by a search using the surname or postcode.

A reason for the refund can be selected from a list, which is maintained in the BackOffice. You will be returned to the *Sale* menu on completion. This is an example of the receipt produced:

Deposit Refund	-3.00
Account Number: 000001	

TOTAL	-£3.00
Cash	£3.00

2.9.15 Recall Approved Return

This option enables you to keep recall returns which have occurred and are under dispute (Tracked Returns). When the customer returns an item, the reason for return can include a disputed return. The appropriate reason must be configured in the BackOffice. In this case, the return cannot be completed until it has been approved. A return is created which is then sent to the store BackOffice or estate manager for approval.

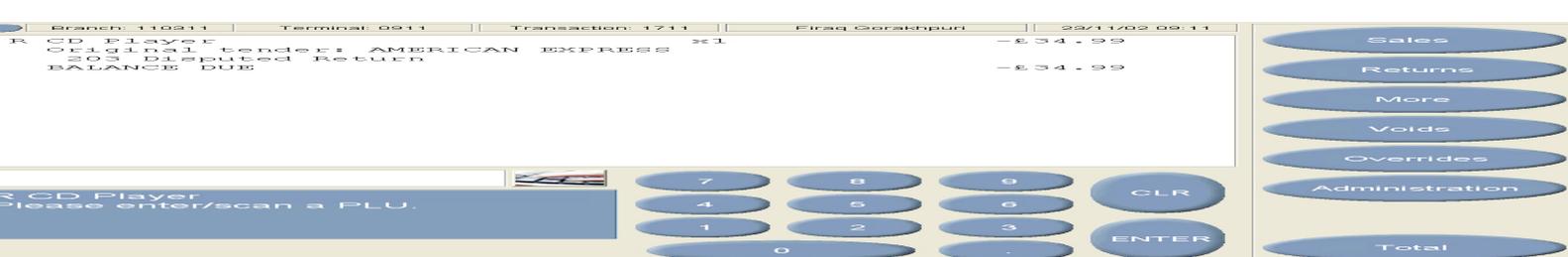
These types of returns can only be approved at the store BackOffice or estate manager. When the tracked return has been approved, the return can then be recalled at the POS for the cashier to give a refund to the customer. Only tracked returns which have already been approved by the store BackOffice or estate manager will be available to you. This is an example of the *Recall Approved Return* screen:

You have the following options at this point:

- Enter the return number (up to 12 alphanumeric characters).
- Press the *Recall by Transaction* button to recall the tracked return by the transaction number if known. You must enter a full transaction code, format bbbbbbpppptttt, where bbbbbb is the branch number, pppp is the POS terminal number and tttt is the transaction number.
- Press the *Recall by Customer* button to recall the tracked return by entering the customer's name. You can then select the required return.

Press the *Cancel* button to cancel the current tracked return process and return to the *Sale* menu (see “Sale Menu” on page 70).

Press the *OK* button to confirm the return required. The *Sale* menu (see “Sale Menu” on page 70) will be displayed, including details of the disputed return, for example:



You can then continue with the transaction as required. This is an example of the receipt produced:

R CD Player	x -1	-29.99
Tracked Return		

TOTAL		-£29.99
Cash		£29.99

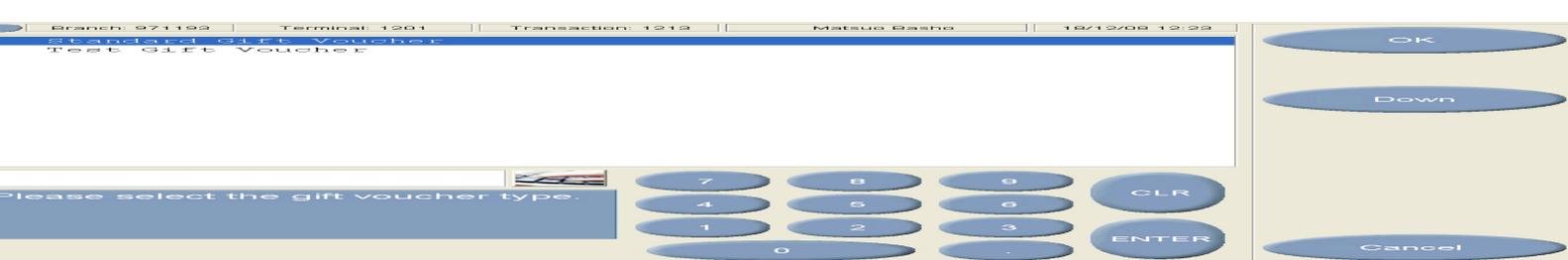
00000100010193050203103658		

2.9.16 Gift Voucher Return

This option enables you to perform a gift voucher return. Gift vouchers can normally be returned only if they are marked as sold. However, some roles can override this and give a return anyway.

Gift vouchers can be referenced by a serial number which must be entered as part of the return process. An operator with the relevant authorisation can override the fact the entered gift voucher was not marked as sold, or the serial number does not exist etc. The gift vouchers available are configured in the BackOffice. This is an example of the *Gift Voucher Return* screen:

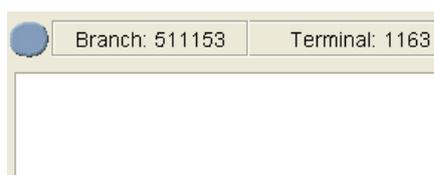
1. Select the required gift voucher type by using the *Up* and *Down* buttons.
2. Press the *OK* button to confirm the selection. You are then prompted to enter the value of the gift voucher being returned. Alternatively, press the *Cancel* button to cancel the gift voucher return process and return to the *Sale* menu (see "Sale Menu" on page 70).
3. Enter or scan the serial number of the gift voucher. The following screen is displayed if the gift voucher is not known to the system for some reason, e.g. serial number not known, voucher not marked as sold:



You now have the following options:

- Press the *Accept* button to proceed with the gift voucher refund.
- Press the *Back* button to return to the previous screen so that the serial number can be re-entered.
- Press the *Cancel* button to cancel the current gift voucher process and return to the *Sale* menu (see “Sale Menu” on page 70).

This is an example of the receipt produced:



2.9.17 Product by MMG Return

This option enables you to return a product by MMG.

2.9.18 Remote Customer Products Return

This option enables you to perform a remote customer product return

2.9.19 Replace from Reservation

This option enables you to perform a replacement from a reservation.

2.9.20 Refund from Gift List

This option enables you to perform a refund from a gift list.

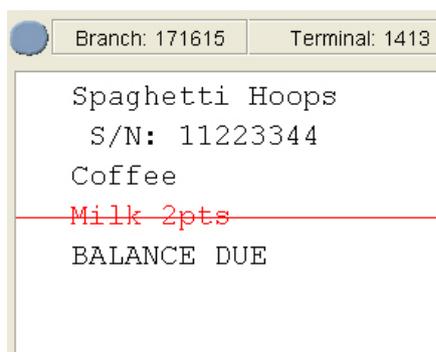
2.10 Void Menu

2.10.1 Void Previous Item

This option enables you to void the last item sold. A reason for the void last must be selected from a list, which is configured in the BackOffice. You are not able to continue with the operation until an authorising operator ID and password (usual format) is also entered.

The authorising operator must also enter a void reference number (up to 40 alphanumeric characters). When the last item has been voided, the screen will appear as follows:

The item, which has been voided, appears on the screen in red and crossed out. The voided item will also appear on the receipt, along with the reason for the void. This is an example of the receipt produced:



On completion of the void last operation, you are returned to the *Sale* menu (see “Sale Menu” on page 70).

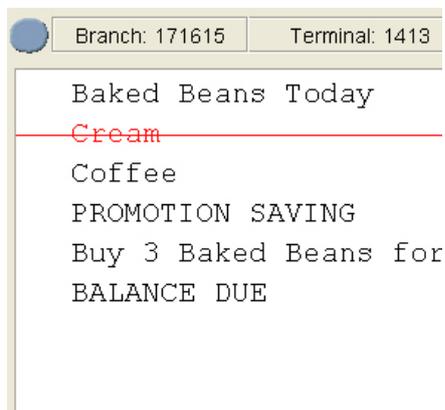
2.10.2 Void Item

This option enables you to void a particular item already entered into the selling process. It is in a similar format to the *Void Last* screen (see “Void Previous Item” on page 110), except you have to identify the product required by entering (or scanning) the product number (up to 20 alphanumeric characters).

A reason for the void item must be selected from a list, which is configured in the BackOffice. You are

not able to continue with the operation until an authorising operator ID and password (usual format) is also entered. The authorising operator must also enter a void reference number (up to 40 alphanumeric characters). When the item has been voided, the screen will appear as follows:

The item, which has been voided, appears on the screen in red and crossed out. The voided item will also appear on the receipt, along with the reason for the void. This is an example of the receipt produced:



On completion of the void item operation, you are returned to the *Sale* menu (see “Sale Menu” on page 70).

2.10.3 Interactive Void

This option enables you to perform an interactive void. This means that you can select the item to be voided on the screen, by highlighting it with the mouse, or using the *Up* and *Down* buttons, for example:

A reason for the screen void must be selected from a list, which is configured in the BackOffice. You are not able to continue with the operation until an authorising operator ID and password (usual format) is also entered. The authorising operator must also enter a void reference number (up to 40 alphanumeric characters).

The item, which has been voided, appears on the screen in red and crossed out. The voided item will also appear on the receipt, along with the reason for the void. This is an example of the receipt produced:



On completion of the screen void operation, you are returned to the *Sale* menu (see “Sale Menu” on page 70).

2.10.4 Void Transaction

This option enables you to void a complete transaction, before the transaction is completed. This function may be configured so that you have to select a reason for the void transaction from a list, which is configured in the BackOffice. You may not be able to continue with the operation until an authorising operator ID and password (usual format) is also entered, depending on the configuration.

The authorising operator must also enter a void reference number (up to 40 alphanumeric characters). This is an example of the receipt produced:

```

***** TRANSACTION VOIDED *****
-----
Mrs Jo Jenkins
25 Oak Grove
Hertford
Herts
SG138AT
-----
You were served by : Raz Jenkins
Biological Washing P      4.25
Washing Powder           4.25
CD Player                 49.99
VOID TRANSACTION         -58.49
  111 Not required by cust
-----
TOTAL                      £0.00
-----
03/04/03 13:31 000001 0001 0180 Operat

```

On completion of the void transaction operation, you are returned to the *Sale* menu (see “Sale Menu” on page 70).

2.10.5 Post Void

This option enables you to perform a post void operation. This is where the effect of an earlier basket is to be reversed. This can only be performed after a transaction has been completed. It is used to reverse a transaction which already exists in the system. This is an example of the *Post Void* screen:

You can then perform the transaction as required. This is an example of the receipt produced:

```

Branch: 171615 Terminal: 1413
***** Tra
BALANCE DUE
No. of Items

```

2.10.6 Manual Post Void

This option enables you to perform a manual post void.

2.10.7 Cancel Post Void

Cancel a current post void operation (see "Post Void" on page 113).

2.10.8 Transaction Tender Correction

This option enables you to correct a transaction tender.

2.10.9 Transaction Correction

This option enables you to correct a transaction.

2.10.10 Void Promotion

Void a current promotion. It can only be performed on the transaction containing the promotion, *before* the transaction is completed. As with other tenders, the function may be configured that you will have to select a reason code and obtain authorisation.

When this option is selected, the current promotion is removed from the POS display and does not appear on the receipt. On completion of the void promotion operation, you are returned to the *Sale* menu.

2.10.11 Cancel Employee Sale

Cancel an employee sale command before the transaction is completed.

2.10.12 Cancel Employee Grade Sale

Cancel an employee grade sale command before the transaction is completed.

2.10.13 Cancel Simple Employee Sale

Cancel a simple employee sale command before the transaction is completed.

2.10.14 Cancel Employee Grade Discount At Total

Cancel a current employee grade discount sale.

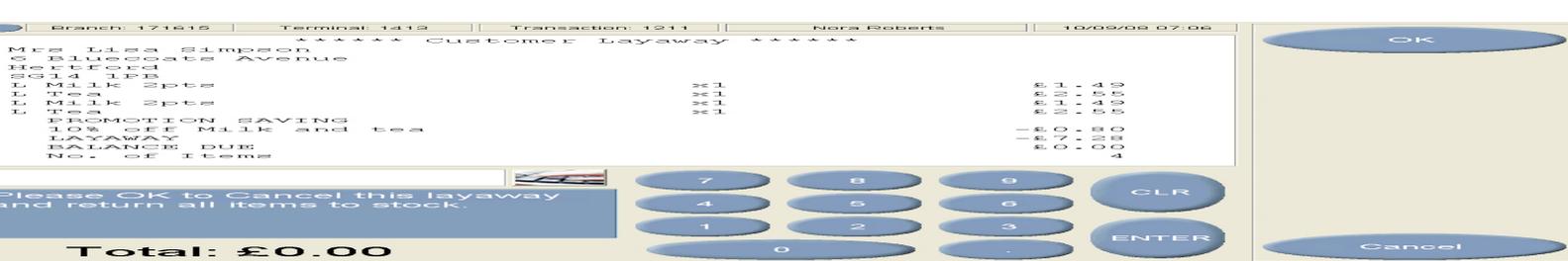
2.10.15 Cancel Customer Order

Cancel a customer order which has been started but with no items entered.

2.10.16 Cancel Customer Layaway

This option enables you to cancel an existing customer layaway, i.e. one that has already been created on the system. This is an example of the *Cancel Existing Customer Layaway* screen:

1. Locate the customer layaway to be cancelled. This can be done in one of three ways:
 - Scan or manually enter the layaway receipt barcode
 - Press the *Search Name* button. The customer name can be up to 20 alphanumeric characters. The results are displayed in a list from which you can select the required customer. You can navigate the list by using the *Up* and *Down* buttons.
 - Press the *Search Postcode* button. The customer postcode can be up to 10 alphanumeric characters. The results are displayed in a list from which you can select the required customer. You can navigate the list by using the *Up* and *Down* buttons.
2. Press the *OK* button to display the customer details, i.e. name and address etc.
3. Press the *OK* button to confirm the details. When you have selected the required layaway, the following screen is displayed:



This gives details of the layaway selected.

4. Press the **OK** button to cancel the selected customer layaway and return to the *Sale* menu. Alternatively, press the **Cancel** button to cancel the current operation and return to the previous screen.

This is an example of the receipt produced:

Layaway Number:	LA000100010098	
Customer Number:	000001	
Mrs Jo Jenkins		
Retail-J		
Cambridge House		
6 Bluecoats Avenue		
Hertford		
Herts		
SG14 1PB		

L Milk 2pts	x 1	1.49
L Tea	x 1	2.55
L Milk 2pts	x 1	1.49
L Tea	x 1	2.55
VOID		-2.55
VOID		-1.49
VOID		-2.55
VOID		-1.49

TOTAL		£0.00

2.11 View Basket Menu

2.11.1 OK

This option enables you to accept the information that is displayed on the screen.

2.11.2 Print Copy

This option enables you to print a copy of the basket.

2.11.3 Tax Receipt

This option enables you to produce a tax receipt.

2.11.4 Gift Receipt

This option enables you to produce a gift receipt.

2.11.5 Receipt Slip

This option enables you to produce a receipt slip.

2.11.6 Tender Correction

This option enables you to correct a tender.

2.12 Customer Details Capture Menu

2.12.1 Customer Details Capture

This option enables you to capture customer details.

2.12.2 Capture Name and Address

This option enables you to enter a name and address for a specific customer. This is an example of the *Enter Name* screen:

1. Enter the *Title* of the customer, e.g. Mr, Mrs etc. (up to five alphanumeric characters).
2. Enter the *Surname* of the customer (up to 20 alphanumeric characters).
3. Enter the *Forename* of the customer (up to 20 alphanumeric characters).
4. Enter the *Initials* of the customer (up to five alphanumeric characters).
5. Press the *OK* button to proceed to the *Enter Address Details* screen. Alternatively, press the *Cancel* button to cancel the current operation and return to the *Sale* menu.

This screen enables you to enter the address of the customer.

The fields are:

- *Post Code*
The postcode (up to 10 alphanumeric characters).
- *Organisation*
The organisation name, if applicable (up to 40 alphanumeric characters).
- *Street 1/Street 2/Street 3*
Up to three address lines before the town (up to 40 alphanumeric characters each).
- *Town*
Town or city name (up to 25 alphanumeric characters).
- *County*
County name (up to 25 alphanumeric characters).
- *Phone Number*
Customer telephone number (up to 18 numeric characters).
- *E-mail Address*
Customer email address (up to 40 alphanumeric characters).

You can either:

- Enter the whole address manually, or
- Enter the customer's postcode and then press the *Look Up Address* button. This will use a look up program which can determine the address from the postcode input.

6. Press the *OK* button to save the address details and return to the *Sale* menu. The customer's name and address will be displayed on the screen and printed on the receipt. Alternatively, press the *Cancel* button to cancel the current operation and return to the *Sale* menu.

This is an example of the receipt produced:

Mrs Phyllis Bunce	
Wildwinds	
16 Vale View	
Newport	
South Wales	
NP19 7QQ	

Childrenswear	12.99

TOTAL	£12.99
Cash	-£15.00
Change	£2.01

2.12.3 Signature Capture

Capture a customer's signature on a signature pad (if available).

2.13 Order Menu

2.13.1 Sell from Order

This option enables you to perform a sale from a customer order.

2.13.2 Customer Order

This option enables you to place an item on order for a particular customer. There are two ways a customer order can be generated:

- A customer order can be generated using this option on the POS.
- A product is automatically ordered if there is no stock of an item which you attempt to sell and the item is flagged as *Check Inventory Level and Allow Order* in the BackOffice. The order will be created and visible in the BackOffice when the transaction is processed.

This is an example of the *Customer Order* screen:

The screenshot shows the 'Customer Order' screen. At the top, there is a status bar with the following information: Branch: 010203, Terminal: 00004, Transaction: 0005, admin, 06/07/08 09:00. Below this, there are four input fields for customer details: Title, Surname, Forename, and Initials. To the right of these fields are two buttons: 'OK' and 'Account Search'. Below the input fields is a numeric keypad with buttons for digits 0-9, a decimal point, CLR, and ENTER. At the bottom right of the keypad area is a 'Cancel' button. A blue banner at the bottom of the keypad area contains the text 'Please enter the customer's name.'

1. Enter the partial details of the customer and press the *Account Search* button then select the desired customer. Alternatively, enter the full details of the customer:
 - a. Enter the *Title* of the customer, e.g. Mr, Mrs etc. (up to five alphanumeric characters).
 - b. Enter the *Surname* of the customer (up to 20 alphanumeric characters).
 - c. Enter the *Forename* of the customer (up to 20 alphanumeric characters).
 - d. Enter the *Initials* of the customer (up to five alphanumeric characters).
2. Press the *OK* button then confirm the delivery address for the customer. Alternatively, press the *Cancel* button to cancel the customer order operation and return to the *Sale* menu.

You cannot create a new customer entry in the database from this screen.

This is an example of the receipt produced:

```

-----
Order Number: CP000100010175
Customer Number: 000001
Mrs Jo Jenkins
25 Oak Grove
Hertford
Herts
SG13 8AT
UK
-----
***** Customer Order *****
0 Personal CD Player   x 1      39.99
  Items on order      x 1      39.99
  Item deposit                10.00
-----
ON ORDER                -39.99
DEPOSITS                 10.00
TOTAL                   £10.00
Cash                    -£10.00
-----
00000100010175040224141643

```

2.13.3 Collect Customer Order

Collect a customer order. It has the same format as the *Collect Customer Layaway* screen (see “Collect Customer Layaway” on page 120).

2.13.4 Display Existing Customer Order

View an existing customer order. Select the required order from a list on the POS using the *Up* and *Down* buttons. The selected order is then displayed. Press the *OK* button to cancel the selected order. Alternatively, press the *Cancel* button to return to the previous screen.

2.13.5 Customer Order Payment

This option enables you to take a payment against a customer order.

2.13.6 Collect Customer Order Item

This option enables you to perform a collect operation for a customer order item.

2.13.7 Convert Sale To Order

This option enables you to convert a sale into a customer order.

2.14 Layaway Menu

2.14.1 Customer Layaway

Perform a customer layaway. A layaway is similar to an order except that items are put aside from available stock into a reserved state ready for the customer to collect. Stock movement takes place when items are reserved but full payment is not taken until they are collected.

2.14.2 Collect Customer Layaway

This option enables you to perform a collect customer layaway function. It is very similar in format to the *Cancel Existing Customer Layaway* screen (see “Cancel Customer Layaway” on page 114). This is an example of the receipt produced:

Layaway Number: LA000100010155		
Customer Number: 000002		
Test Customer		
Retail-J		
Cambridge House		
6 Bluecoats Avenue		
Hertford		
Herts		
SG141PB		
UK		

Milk 2pts	x 1	1.49
Tea	x 1	2.55
Baked Beans Today	x 1	0.99
S/N: 45324763		
SUB TOTAL		5.03

You have saved/earned:		
10% off Milk and tea		-0.40

TOTAL		£4.63
Cash		-£5.00
Change		£0.37

You could have earned 25 points.		

00000100010155050127095218		

2.14.3 Display Existing Customer Layaway

View an existing customer layaway. Select the required layaway from a list on the POS using the *Up* and *Down* buttons. The selected layaway is then displayed. Press the *OK* button to cancel the selected layaway. Alternatively, press the *Cancel* button to return to the previous screen.

2.14.4 Customer Layaway Payment

This option enables you to take a payment against a customer layaway.

2.15 Quote Menu

2.15.1 Quote

This option enables you to perform a quote operation.

2.15.2 Convert Quote To Sale

This option enables you to convert a quote into a sale.

2.15.3 Convert Quote To Collect Sale

This option enables you to convert a quote into a collect sale.

2.15.4 Convert Quote To Order

This option enables you to convert a quote into a customer order.

2.16 Collect Sale Menu

2.16.1 Collect Sale

This option enables you to perform a collect sale operation.

2.16.2 Cancel Collect Sale

This option enables you to cancel a collect sale.

2.16.3 Display Existing Collect Sale

This option enables you to view an existing collect sale.

2.16.4 Convert Sale To Collect Sale

This option enables you to convert a sale into a collect sale.

2.17 Non Sale Menu

2.17.1 Repair

This option enables you to enter details of a product which has been returned to the store for repair. The repair is usually created at the POS, but can also be created in the BackOffice. You must enter a description of the repair to be carried out and an approximate value. The name and address of the customer are also captured.

On creation, the repair is entered into the system. When the repair has been carried out, the actual cost of the repair is entered via the BackOffice. You can then use the recall repair option (see “Recall Repair” on page 123) to return the product to the customer and receive the required payment. This is an example of the *Repair* screen:

1. Enter a description of the repair required (up to 200 alphanumeric characters).
2. Press the *OK* button to continue with the repair creation. Alternatively, press the *Cancel* button to return to the *Sale* menu.
3. Enter an estimate of the cost of the repair.
4. Enter the customer's name and address (same format as Enter Address, see “Capture Name and Address” on page 117).

This is an example of the receipt produced:

Mr Nick Jenkins	
25 Oak Grove	
Hertford	
Herts	
SG138AT	

Repair	
Estimated Cost	10.00

TOTAL	£0.00

2.17.2 Recall Repair

This option enables you to recall a repair which has already been generated. It has a similar format to the *Return Loan Item* screen (see "Sale Menu" on page 70). This is an example of the receipt produced:

Repair Payment	5.00

TOTAL	£5.00
Cash	-£5.00

00000100010199050203130929	

2.18 Offline Sale Menu

2.18.1 Print Receipt

This option enables you to force printing of an interim receipt in the middle of a transaction. This is an example of the interim receipt produced:

***** INTERIM RECEIPT *****		
Tea 250g	x 3	7.65
Milk 2pts	x 2	2.98

TOTAL		£10.63

You could have earned 8 points.		

2.18.2 Print PC Receipt

This option enables you to print out a receipt on a PC printer. This option is only available while a transaction is in progress, up until the tender is selected. This is an example of the receipt produced:

```

***** INTERIM RECEIPT *****
Milk 2pts          1.49
Tea                2.55
SCS Product       2.99
SUB TOTAL         7.03
-----
You have saved/earned:
10% off Milk and tea  -0.40
-----
TOTAL             £6.63
-----
You could have earned 25 points.
-----

```



00000100010174050201113323

2.18.3 Request Receipt

Used when a receipt would not normally be produced. It forces a receipt to be printed.

2.18.4 Request Slip Receipt

This option enables you to print a slip receipt.

2.18.5 Request Tax Receipt

This option enables you to print a tax receipt. This means that the receipt produced at the end of the transaction will give details of any tax included in the transaction. This is an example of the receipt produced:

```

-----
Personal CD Player x 2      79.98
-----
TOTAL                     £79.98
D Mark                    -254.90 DM
Rate: DM3.187/£          -£79.99
Change                     £0.01
-----
You could have earned 78 points.
-----
Tax Breakdown
Full VAT                   68.07    11.91
-----

```

2.18.6 Request Tax Slip Receipt

This option enables you to print a tax slip receipt.

2.18.7 Cancel Tax Receipt Request

This option enables you to cancel a request to print a tax receipt.

2.18.8 Cancel Tax Slip Request

This option enables you to cancel a request to print a tax slip.

2.18.9 Request Gift Receipt

This option enables you to request a gift receipt to be printed. This means that all the purchased items appear on the receipt, but without their associated prices.

This is an example of the receipt produced:

```

-----
***** GIFT RECEIPT *****
Pop socks                               FXS
-----
  
```

If the receiver of the gift wishes to return or exchange the item, you can key in the code shown on the receipt (in this example FXS), instead of the amount, when prompted for the original price.

2.18.10 Print Last Receipt

This option enables you to force printing of the last receipt printed. This could be used if the receipt was not printed corrected for some reason, paper jam etc. This is an example of the receipt produced:

```

-----
***** COPY RECEIPT *****
Milk 2pts                               1.49
Tea                                       2.55
CD Player                               29.99
SUB TOTAL                               34.03
-----
You have saved/earned:
10% off Milk and tea                    -0.40
-----
TOTAL                                   £33.63
Cheque                                  -£33.63
Auth Code: 157318
-----
You could have earned 54 points.
-----
00000100010173050201112454
  
```

2.18.11 Print Last Tax Receipt

This option enables you to force printing of the last tax receipt printed.

2.18.12 Print Last Slip Receipt

This option enables you to force printing of the last slip receipt printed.

2.18.13 Print Last Tax Slip

This option enables you to force printing of the last tax slip printed.

2.18.14 Print Last Gift Receipt

This option enables you to force printing of the last gift receipt printed.