How To – POS Options

1) Normal Sale

a) Scan the products using the barcode scanner (they will list on the LHS of the page)
b) Select Pay by Cash or Pay by Card
c) Process payment via Cash (enter amount tendered, the system will inform you how much change they require) or Card (the payment process will move to the Clover Card payment facility)

2) Customer Sale/Search

a) At any point during the sale process, either before the articles are scanned or just before the order is complete select Home and then Customer Search
b) Search for the customer using 4 letters of their name or 4 numbers of their phone number. This will load the customer details on the POS and will apply any special terms they have, e.g. loyalty points, accumulator promotions or special prices/discounts.

3) Add a Customer

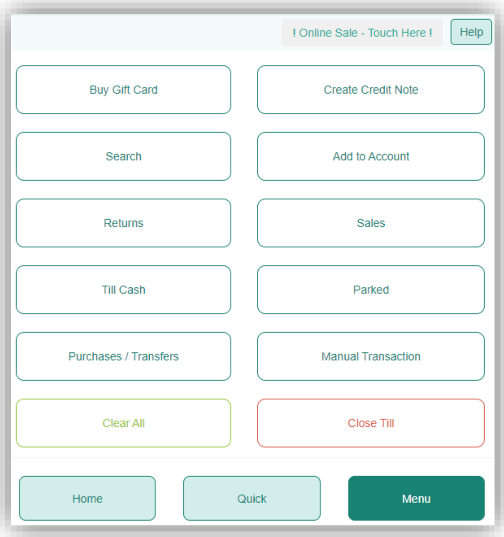
a) From the Pos home screen, select Customers, select Add Customer
b) The only mandatory field is Email
(if the customer has no email, then add their Names and Phone number, select Create Email from Phone Number.
NB This will NOT create a real email address)
c) Select Save

4) Product Search

a) Should the scanner not work, or in the event of a lost or unreadable barcode, use the Product key and enter a search term in the search field or scan a similar item in another size/color
b) Select the Product you were looking for. You will then be presented with a Stock list of all the variations for that product, with stock available and Retail price
c) Add the appropriate stock product, close the windows and continue the sale to completion as before.

5) Unallocated

a) If the product has no barcode, has a barcode that is not recognised by the system and you cannot find it in Product Search, then use the Unallocated button.
b) If you have scanned a barcode, then the barcode will appear on the top line.
c) Enter the description of the article, the quantity bought, the price and the tax rate.
d) Select Save.
e) Finish the sale as above
NB: If the same product is scanned again – it will return the details previously entered.



6) Gift Card Sale

a) Select Menu from the POS screen
b) Select Buy Gift Card
c) Either
   i) Scan a pre-made Gift Card code (e.g. printed cards in store),
   ii) Key in an amount
   iii) Choose an amount from the buttons at the bottom of the screen
d) Add any Additional Notes the customer would like on the Gift Card printout ("Happy Birthday Julie", etc)
e) Select Create Gift Card

7) Create Credit Note

Used to create manual credit notes only. E.g. when the receipt cannot be found / when returning stock sold pre-Aptimyz / when the barcode cannot be scanned or replicated)

a) Select Menu from the POS screen (bottom right button)
b) Select Create Credit Note
c) Enter Amount
d) Enter a note to support the credit note
e) Enter a Reason Issued (this will appear in reports)
f) Select Customer, if applicable
g) Select Create Credit Note

8) Create a Layaway

a) From Home POS screen
b) Select Customer
c) Choose or Add a Customer
d) Scan an item
e) Select Checkout
f) Select Layaway
g) Select Create New Layaway
h) Submit

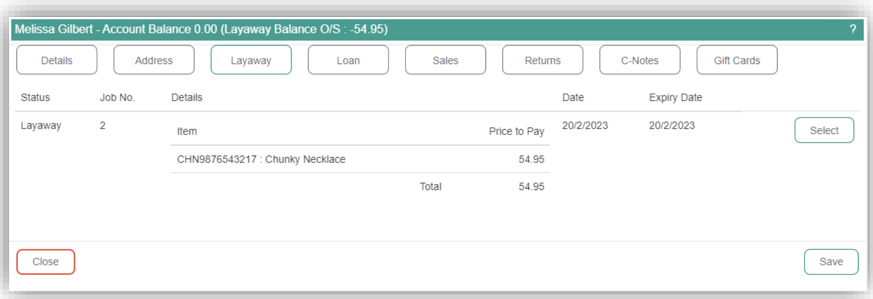
9) Add to Account (Customer Deposit Account only)

Use this option to either build up a deposit account for customers who may need to spend a lot at one time (Christmas or new school year) or to pay for Layaway items in smaller increments.

a) From Home > Customers then Search or Add Customer
b) From Menu Select Add to Account
c) Enter amount paid in by customer, Submit
d) Complete Sale

10) Redeeming a Layaway

a) To find a Layaway number,
   i) Either: Scan the original Layaway receipt
   ii) Or, from Menu > Search > Layaway Search
   iii) Or, from Home > Customers > Select anywhere in the customer window
   iv) Click on Layaway



b) Select the Layaway job by using the Select button, then either
   i) Delete the job
   ii) Re-Print
   iii) Pay for Items using Pay by Cash, Pay by Card or Checkout > From Points or From Account

Returns / Refunds

c) If you have a receipt:
   - i) Scan the original receipt in the main basket area
   - ii) Choose the item to be returned and Select Return
   - iii) Type in the reason
   - iv) Select Proceed
   - v) Close the receipt page
   - vi) Either:
     - (1) Exchange item by scanning the barcode of the replacement item
     - (2) Refund – Pay by Cash
     - (3) Refund – Pay by Card
     - (4) Refund – Issue Credit Note
       - (a) Select Checkout
       - (b) Select Issue Credit Note
       - (c) Finish

Returns / Refunds

d) If NO receipt available:
   - i) Select Menu
   - ii) Select Sales
   - iii) Find the original sale, if possible
   - iv) Select the ⇄ key
   - v) This will display the order with a ⇄ Return against any line that can be returned
   - vi) Select the Return key
   - vii) Fill out a reason for return
   - viii) Select Proceed
   - ix) Select Close
   - x) Refund as above in (a, vi) above

Returns / Refunds

e) If NO receipt and NO identifiable sale (as in "(b)" above)
   - i) Select Menu
   - ii) Select Returns
   - iii) Scan the barcode of the returned item
   - iv) Select the Return key ⇄ Return
   - v) Fill out a reason for return
   - vi) Select Proceed
   - vii) Select Close
   - viii) Refund as above in (a, vi) above

Returns / Refunds

- f) If NO receipt and NO identifiable sale and NO barcode
    - i) Select Home
    - ii) Select Product Search
    - iii) Select Open Department
    - iv) Enter Description of product and that it is a refund 

    - v) Quantity = 1
    - vi) Price = the amount of refund (NB: ensure you use a minus before the number)
    - vii) Select Save
    - viii) Refund as above in (a, vi) above

11) Adding or Withdrawing Cash to/from the till (Not a Refund or Sale)

- a) From Menu
- b) Select Till Cash
- c) Select Till Deposit
    - i) Amount
    - ii) Comment
    - iii) Save
- d) Or, Select Till Withdrawal
    - i) Amount withdrawn
    - ii) Comment
    - iii) Copies – defaults to a single print. Would be useful to print 2 if you were paying someone e.g. window cleaner, one for the till drawer and one for the window cleaner.
- e) Close

12) Parking a Sale

- a) Scan the goods as normal
- b) If the customer needs to Park the sale (wants to go back into the store to choose other items)
    - i) Add items as normal
    - ii) Select Checkout
    - iii) Select Park
    - iv) Add Description (e.g. Customer Name)
    - v) Continue
- c) The Parked order will print a receipt marked "Parked"

13) Retrieving a Parked Sale (a Parked Sale can be retrieved from any Till in store.)

- a) Select Menu
- b) Select Parked
- c) A list of Parked orders will be displayed, select the appropriate order
- d) Continue
- e) Add further items and complete the sale as above.

14) Opening the Cash Drawer from the system

a) From Menu
b) Select Till Cash
c) Select Open Cash Drawer

15) Manual Refund or Charge (This is a seldom used process, please be aware that manual transactions will not be saved against sales or stock items in Aptimyz)

a) Select Menu
b) Select Manual Transaction
c) Enter a Reason
d) Enter an amount
e) Select a Tax Group if applicable
f) Select if the transaction is a Charge or a Refund
g) Finish the transaction as normal
h) This transaction will appear on the Z-report as a Manual Transaction, but your stock levels and costs will not be affected.

16) Emailing an E-Receipt (this function can be set up to be offered with each sale, by changing the setting in the back office)

a) Upon completing the order, when the operator goes to checkout (either by Checkout / Cash / Card) they will be asked the tender type (or amount, etc)
b) Following tender amount, the screen will display:

    E-Receipt ?
    Enter Email if this Customer would like the receipt emailed to them.

   The till operator can then type in a valid email address.
c) Aptimyz will then check to see if the customer is already registered, if not a new account will be set up automatically, with just the email address.
d) The system will ask for confirmation to send an email receipt, if Yes is selected – the customer will have their receipt sent directly to their inbox.
e) The order will then finish normally