

Point of Sale Transactions – Table of Contents

Processing Transactions in Point of Sale Entry.....	3
Point of Sale Entry.....	4
Point of Sale Sign On Screen.....	6
POS Customer Search Screen	8
POS Customer Search Screen Fields and Function Keys.....	9
Enter Order/Enter Return Screen.....	10
Enter Order/Enter Return Screen Fields and Function Keys.....	11
Enter Order/Enter Return Item Review Screen	17
Enter Order/Enter Return Item Review Screen Fields and Function Key	18
Line Selection Screen	26
Line Selection Screen Fields and Function Keys	27
Authorization Screen	28
Authorization Screen Fields and Function Keys.....	29
Special Charge Screen.....	30
Special Charge Screen Fields and Function Keys.....	31
Comments Screen.....	32
Comment Screen Fields and Function Keys.....	33
Item Search Screen	34
POS Item Search Screen Fields and Function Keys	35
Customer Bill-To Address Screen.....	36
Customer Bill-To Address Screen Fields and Function Keys.....	37
POS Header Screen	39
POS Header Screen Fields and Function Keys.....	40
Check Out Screen.....	45

Check Out Screen Fields and Function Keys	47
Cash Payment Screen	52
Cash Payment Screen Fields and Function Key	53
Credit Card Payment Screen	54
Credit Card Payment Screen Fields and Function Keys	55
Check Payment Screen	59
Check Payment Screen Fields and Function Keys	60
On Account Screen	61
On Account Screen Fields and Function Keys	62
Change Screen	63
Change Screen Fields and Function Keys	64
 Working with Saved Transactions.....	 65
Entering the transaction	65
Saving the transaction	66
Recalling and completing the transaction.	69

Processing Transactions in Point of Sale Entry

Point of Sale Entry allows you to enter and manage retail orders and returns at your store. This section provides information about the activities that you will perform in Point of Sale Entry. These activities include:

- **entering** an order/return
- **checking** out and applying different payment methods
- **searching** for an existing customer
- **canceling** an order/return
- **changing** an item on the order/return
- **deleting** an item from the order/return
- **saving** an order/return and recalling a saved order/return
- **managing** money in the terminal drawer

All of these activities are available from the Point of Sale Entry option on the Point of Sale Main Menu.

Point of Sale Entry

Point of Sale Entry is where POS processing is performed. Use this option to perform quick, over-the-counter Invoice Only orders/returns.

The screens and/or reports in this option and a brief description are listed in the following table. A complete description of each screen/report is contained in this section.

Title	Purpose
Point of Sale Sign On Screen	Used to sign on to the terminal.
Terminal Close Confirmation Screen	Used to close the terminal.
POS Customer Search Screen	Used to specify or search for a customer.
Enter Order/Enter Return Screen	Used to enter items. Also provides access to most other features.
Enter Order/Enter Return Item Review Screen	Used to review information for an item.
Line Selection Screen	Used to select a line item to change.
Weight Screen item.	Used to enter the weight of a catch weight item.
Authorization Screen	Used to provide an authorization code to override clerk security limits.
Lot/Serial Assignments Screen	Used to enter or review lot/serial numbers.
Lot/Serial Availability Screen for an item.	Used to select an existing lot/serial number
Lot/Serial Entry Screen item.	Used to enter the lot/serial number for an item.
Special Charge Screen	Used to specify a special charge for the order/return or line.
POS Header Screen	Displays information about the customer's pricing, taxing, invoicing terms, and sales representatives.
Comments Screen	Used to specify comments.
POS Item Search	Used to search for items. Screen
Customer Bill-To Address Screen	Used to review customer address information and make changes to it.

Title	Purpose
Drop/Pull Screen	Used to add money to or remove money from the drawer.
Check Out Screen	Used to finalize the order/return.
Search Word Screen	Used to save the order for future check out.
Pickup/Delivery Payment Type Screen	Used to specify the payment method for pickup/delivery items on the order.
Print Options Screen	Used to specify the document for which you want to specify a print location.
Deposit Screen	Used to specify the amount being placed on deposit for pickup/delivery items.
Cash Payment Screen	Used to apply cash payments.
Credit Card Payment	Used to apply credit card payments. Screen
Check Payment Screen	Used to apply check payments.
On Account Screen	Used to apply on account payments.
Change Screen	Displays the amount of change owed to the customer.

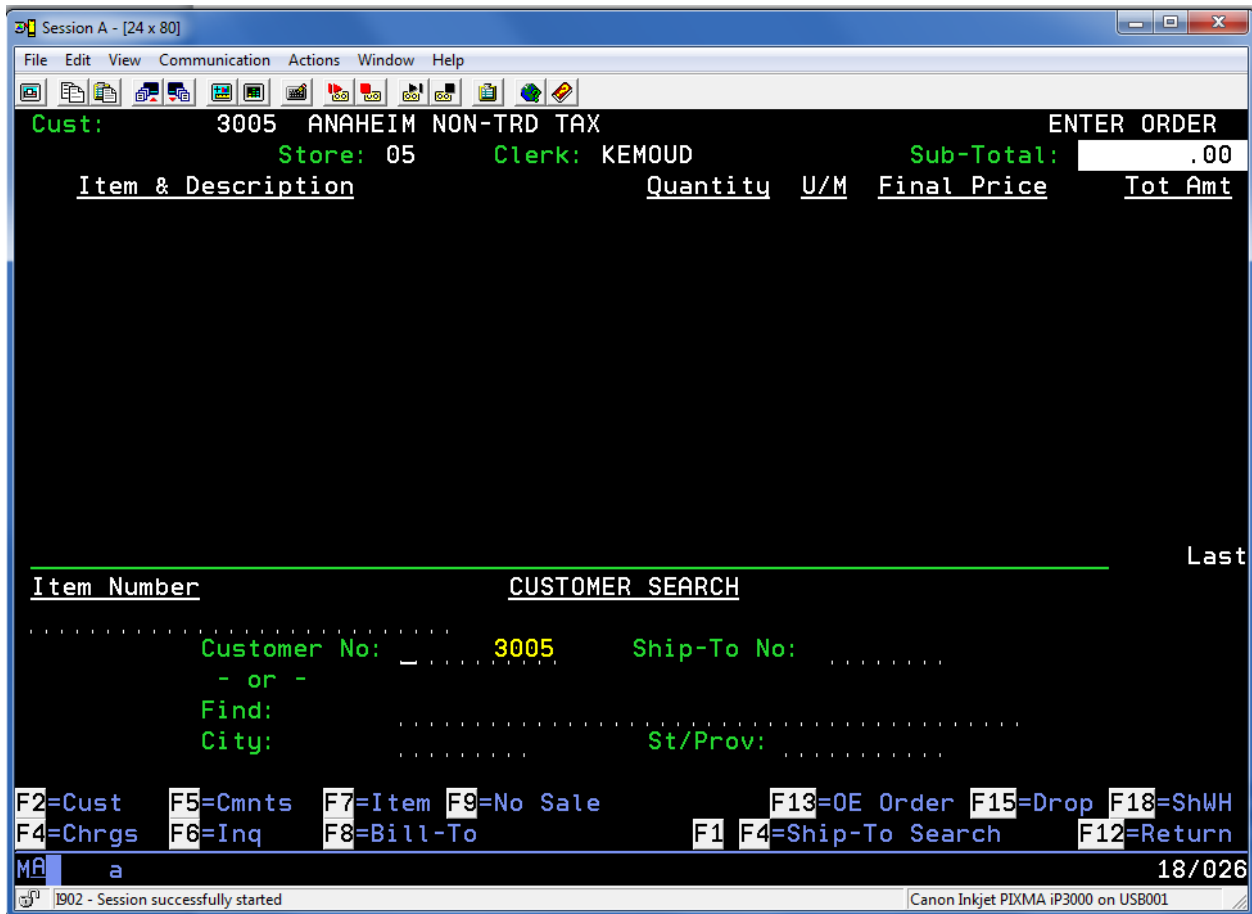
Point of Sale Sign On Screen



This screen appears after you select the Point of Sale Entry option from the Point of Sale Main Menu. This screen will appear before each new transaction. Use this screen to specify the type of transaction you want to perform and to provide security information to sign on to the terminal. From this screen, you can also go to the Customer Inquiry and close the terminal.

Field/Function Key:	Field Description
Function:	<p>Use this field to indicate whether you are processing an order or return. You can enter returns only if your clerk ID has been defined to allow returns.</p> <p>If you key O, you are entering an order.</p> <p>If you key R, you are entering a return.</p> <p>Important</p> <p>If you retrieve a saved order through this option, the saved order will be converted to the order type specified in this field. If you want to retain a saved order's order type, you must key that order's order type in this field.</p>
Clerk ID:	Use this field to enter your clerk ID.
Password:	Use this field to enter your password. For security, your password is not shown as you enter it.
Terminal:	<p>Use this field to enter the ID of the POS terminal at which you are working. ID # is store number plus terminal number.</p> <p>Example: Store 2, terminal 1 is 21</p>
Drawer:	Use this field to enter the ID of the drawer assigned to the terminal at which you are working.
Store:	Use this field to enter the ID of the store where you are working. If the <i>Orders for Multiple Stores</i> field is selected for your clerk ID, you can specify a store other than the default store assigned to your clerk ID; otherwise, you are only authorized to work at your default store. If you leave this field blank, the system will use the default store.
F2=Close Terminal:	Press this function key to close-out the drawer at the end of your shift and print a form where you will record the cash in the drawer. The form will print on the output queue specified for the terminal. That output queue could be the receipt printer on your POS terminal, or it could be another printer in the store.
F3=Exit:	Press this function key to return to the Point of Sale Main Menu.
F21=Cust Inq:	Press this function key to inquire about a customer. You must specify your clerk ID, password, and the terminal and drawer ID before you can press this function key. The Customer Inquiry Selection Screen appears. Refer to the <i>Accounts Receivable</i> manual for a description of this screen.
Enter:	<p>Press this key to confirm your entries and sign on to the terminal and drawer. The following screen appears:</p> <ul style="list-style-type: none"> The line entry screen with your default customer account number 30XX. XX=your two-digit

POS Customer Search Screen



This screen appears after you press

- The F2 function key on the Enter Order/Enter Return Screen

Use this screen to enter or search for the customer and ship to address for which you want to enter the order or return. Specifying a customer assures that you are using the pricing, taxing, and payment terms defined for the customer through Customer/Ship to Master Maintenance.

POS Customer Search Screen Fields and Function Keys

Field/Function Key: Description

Customer No:	If you know the customer number, use this field to specify the number of the customer for whom you want to enter the order or return.
Ship-To No:	If the order or return is for a specific ship to address, use this field to specify the customer's ship to address number. If you do not know the ship to number, use the F4 key to search for it
Find:	<p>Use this field either alone or with the <i>City</i> and <i>St/Prov</i> fields to search for the customer by name, phone number, and zip/postal code.</p> <p>Key one or more of the following, separated by one blank space:</p> <ul style="list-style-type: none">• Up to 10 characters (the first 10) of one or more words in the customer's name. Key the words in any order.• Up to 10 characters (the first 10) of the PO contacts phone number, excluding the country code and delimiters.• Up to 5 characters (the first 5) of the customer's zip/ postal code
City:	Use this field either alone or with the <i>Find</i> and <i>St/Prov</i> fields to search for a customer in a particular city. Key up to 8 characters (the first 8) of the customer's city.
State/Prov:	<p>Use this field with one or both of the <i>Find</i> and <i>City</i> fields to search for a customer in a particular state or province.</p> <p>Key up to 10 characters (the first 10) of the state or province code.</p>
F4=Ship-To Search:	Press this key to search for ship to addresses defined for the customer specified in the <i>Customer No</i> field. The Customer Search Screen will appear, listing ship to addresses for the customer.
F12=Return:	Press this function key to return to the Point of Sale Sign On Screen or the Enter Order/Enter Return Screen without selecting a customer.
Enter:	Press this key to continue. If you entered customer search criteria, the <i>Customer Search</i> screen appears. If you entered a customer number, the Enter Order/Enter Return Screen appears.

Enter Order/Enter Return Screen



This screen appears after you:

- press ENTER on the Point of Sale Sign On Screen if a default customer is assigned to the store in which you are working
- enter a customer number and press ENTER on the POS Customer Search Screen
- select a customer from the Customer Search Screen
- Use this screen to enter or scan the items that the customer is purchasing or returning. This screen also provides access to many other activities. For example, from this screen, you can
 - search for customers and items
 - add comments and special charges to the order/return
 - access header and address information about the customer
 - access the customer, item, and POS inquiries
 - add money to or remove money from the drawer
 - perform a no sale
 - select an order entry order for payment processing
 - change the shipping warehouse for pickup/delivery items

Your ability to use some features available from this screen is determined by the settings for your clerk ID

Enter Order/Enter Return Screen Fields and Function Keys

Field/Function Key:	Description
Cust:	<p>This field displays the number and name of the customer for whom the transaction will be entered. If a default customer is defined the default customer number and name will display when you first access this screen. If a default customer is not assigned to the store or if you change the customer number, the customer number that you entered on the POS Customer Search Screen or selected from the Customer Search Screen will display.</p> <p>You can use the F2 function key to change the customer number. Refer to that function key for more information.</p>
Order:	<p>This field appears only after you have added an item to the order or return.</p> <p>The POS order number assigned to the order or return by the system displays in this field.</p>
Store:	<p>This field displays the store ID for which the transaction will be entered. The store ID that displays will be either the store ID entered on the Point of Sale Sign On Screen , or if you left the <i>Store</i> field blank on that screen, the system will display the default store assigned to your clerk ID.</p>
Clerk:	<p>This field displays the ID of the clerk currently signed on at this POS terminal.</p>

Enter Order/Enter Return Screen Fields and Function Keys

Field/Function Key: Description

Sub-Total:	This field displays the running sub-total for all line items currently on the order or return. The sub-total does not include tax and trade discounts. Tax and trade discounts are added to the total at checkout.
Item & Description:	This field displays the number and description of the item on the order or return.
Quantity:	This field displays the quantity of the item ordered in the item's ordering unit of measure.
U/M:	This field displays the unit of measure associated with the scanned bar code for the entered item number.
Final Price:	This field displays the final price of one unit of the item. This field is calculated by multiplying the unit price by the override discount percent.
Tot Amount:	This field displays the total amount of all units of the item ordered.
Item Number:	Use this field to enter or scan the item number of the item being purchased or returned. If the <i>Prompt for POS Line Type</i> field is Y in Item Balance Maintenance, after entering/scanning the item, the Line Type Screen appears prompting you to designate the line type. If the <i>Prompt for POS Line Type</i> field is N in Item Balance Maintenance, the Line Type Screen will not automatically appear after you enter or scan the item. To change the line type, you must then use the F18=LINE TYPE function key on the Enter Order/Enter Return Item Review Screen
F2=Cust:	Press this function key to search for the customer for whom you want to enter the order or return. The POS Customer Search Screen appears.

Enter Order/Enter Return Screen Fields and Function Keys

Field/Function Key: Description

F4=Chrgs:	Press this function key to enter special charges for an item or the order or return. For example, you might enter delivery cutting charge or drilling charge. The Special Charge Screen appears.
F5=Cmnts:	Press this function key to enter comments for an item or the order or return.
F6=Inq:	Press this function key to display additional function keys that allow you to access various inquiries and change the POS Entry mode.
F7=Item:	Press this function key to search for an item. The POS Item Search Screen appears.
F8=Bill-To:	Press this function key to view and/or change the address, phone, fax, and e-mail information for the customer for this order/return. The Customer Bill-To Address Screen appears.
F9=No Sale:	Press this function key to open the cash drawer and print a no-sale receipt. If your clerk ID does not permit you to perform a no sale transaction, the Authorization Screen appears. An authorization code must be entered before you can continue.
F10=Chk Out:	This function key appears only after a line item has been added to the order or return. Press this function key to indicate that you have finished entering the order/return and are ready to complete the transaction. If the order contains pickup/delivery items, the Shipping Information Screen appears; otherwise, the Check Out Screen appears.
F11=Gift:	This function key appears only if you are entering an order, not a return. Press this function key to add the purchase of a gift certificate or gift card to the order, increase the balance on an existing gift card, or print a receipt for an existing card's remaining balance. The Issue Gift Card Screen appears.

Enter Order/Enter Return Screen Fields and Function Keys

Field/Function Key: Description

F12=Return:	This function key appears only when there are no line items on the order or return. Press this function key to return to the Point of Sale Sign On Screen. To end a transaction with line items, use F24. This function key also appears after you press F6. Press this key to return to the non-inquiry function keys.
F13=OE Order:	This function key appears only when the order has no line items. Press this function key to search for an order number and generation for an order entered through Enter, Change & Ship Orders (MENU OEMAIN) to process a payment for the order, maintain the order, or ship confirm it. The OE Order Number Screen appears.
F13=Chg Line:	This function key appears only if the order contains a line item. Press this function key to select a line item from the list. The Line Selection Screen appears.
F14=Head:	Press this function key to display information about the order including pricing, taxing, terms and sales rep. If your clerk ID is defined to allow access to header information, the POS Header Screen appears. If your clerk ID does not permit you to access this screen, the Authorization Screen appears. An authorization code must be entered before you can view header information.
F15=Drop:	Press this function key to add money to (drop) or remove money from (pull) the cash drawer. The Drop/ Pull Screen appears.

Enter Order/Enter Return Screen Fields and Function Keys

Field/Function Key: Description

F16=Saved: This function key appears only for an unsaved transaction with no line items. Press this function key to view a list of all saved orders/ returns, including those orders/returns currently in error status, to select one to complete. The Point of Sale Inquiry Screen appears.

Important: If you retrieve a saved order/return through this option, the saved order/ return will reflect the order type specified in the **Function** field on the Point of Sale Sign On Screen. If you want to retain a saved order's/return's order type, you must key the order's/return's order type in that field.

F17=UPC Cross Ref: This function key appears only after you press the F6 function key to display additional function keys. Press this key to maintain Universal Product Codes (UPC) for items. The UPC Item/UOM Cross Reference Screen will appear.

F18=ShWH Press this function key to specify the shipping warehouse for pickup/delivery items on the order. The Shipping Warehouse Screen appears.

F19=Comments: This function key appears only after you press the F6 function key to display additional function keys. Press this key to review or maintain customer service comments for this customer. The Customer Service Comments Screen appears. Refer to the Order Entry manual for a description of this screen.

F20=POS Inq: This function key appears only after you press the F6 function key to display additional function keys. Press this function key to access the POS Inquiry where you can perform an inquiry about a POS order.

Enter Order/Enter Return Screen Fields and Function Keys

Field/Function Key: Description

F21=Cust Inq: This function key appears only after you press the F6 function key to display additional function keys. This function key appears only if you are authorized to access the customer inquiry. Your POS sign on does not determine access to this feature.

Press this function key to access the customer inquiry, where detailed accounts receivable information for a customer is displayed.

F22=Item Inq: This function key appears only after you press the F6 function key to display additional function keys. This function key appears only if you are authorized to access the item inquiry. Your POS sign on does not determine access to this feature.

Press this function key to access the item inquiry, where you can display the inventory status of an item.

F23=Quick Entry: This function key appears only after you press the F6 function key to display additional function keys. Press this function key to alternate between entering items in quick entry mode or regular mode. Quick entry mode allows you to bypass the Enter Order/Enter Return Item Review Screen. The default entry mode for this terminal is specified through Terminals/ Drawers Maintenance.

F24=Cncl: This function key appears only for orders or returns with line items. Click this function key to cancel the current transaction. If your clerk ID allows you to cancel orders, a confirmation screen displays asking you to confirm. If your clerk ID does not allow you to cancel orders, the Authorization Screen appears. To end a transaction that does not have line items, use F12.

Enter Order/Enter Return Item Review Screen

Session A - [24 x 80]

File Edit View Communication Actions Window Help

Cust: 3005 ANAHEIM NON-TRD TAX ENTER ORDER

Order: 5030721 Store: 05 Clerk: KEMOUD Sub-Total: 61.32

Item & Description	Quantity	U/M	Final Price	Tot Amt
1 11534P 8.5x11-24# Classic Linen Whitestone 12M	1.000	PKG	30.66000	30.66
2 11534W 8.5x11-24# Classic Linen Indigo Ice 12M	1.000	PKG	30.66000	30.66

Item No 1.000- Avail Quantity UM? Price

11534W 1.000 List: 30.66000

Override Disc%: Total Amt: 30.66

Item Description 8.5x11-24# Classic Linen Indigo Ice 12M

Price List: 1 Tax Code: 0

F2=WHS F5=View Cost F6=Inq F10=Chk Out F12=Return F18=Line Type F24=Delete

MA a 17/030

1902 - Session successfully started Canon Inkjet PIXMA iP3000 on USB001

This screen appears after you enter an item number on the Enter Order/Enter Return Screen and press ENTER, if you are in regular entry mode (not quick entry mode) or after you select a line item to change. This screen allows you to review or change the item's information.

You can enter the quantity, make price adjustments, offer discounts (if your Clerk ID is authorized to do so), and change the unit of measure (if applicable).

If this information is correct, you can press ENTER to accept the information and the item information is moved to the list of items at the top of the Enter Order/Enter Return Screen.

The display fields in the top portion of this screen are the same as those on the Enter Order/Enter Return Screen. Refer to that screen for a description of those fields. Only the fields and function keys in the bottom portion of this screen are explained in this section.

Enter Order/Enter Return Item Review Screen Fields and Function Key

Field/Function Key: Description

Item No: This field displays the number of the item that you entered on the Enter Order/Enter Return Screen or selected from the Line Selection Screen

Avail: This field displays the quantity available of this item in its default stocking unit of measure or the unit of measure keyed in the *U/M* field.

The quantity available is calculated as:

- Available = Qty On-hand - Allocated + In Process - Unavailable + Return Qty* + Special Order Qty

* *Return Qty* is the sum of all the quantity returned for open orders with *Allocate Inventory* = Y. If an additional unit of measure is used (as opposed to one of the stocking units of measure), the quantity available of this item will then be displayed in that measure. For example, if you have 100 EA (stocking) available of an item and you enter an order for that item as 2 CAS (additional) and the conversion factor is 5 EA per CAS, then the quantity available displayed in this field will be 20 instead of 100 to reflect the CAS unit of measure available.

NOTE: For Point of Sale, Kit availability is calculated at the parent level only.

Enter Order/Enter Return Item Review Screen Fields and Function Keys

Field/Function Key: Description

Quantity:	<p>Use this field to specify the number of items being purchased or returned. If you leave this field blank, the system will assume the quantity is 1 for orders and -1 for returns.</p> <p>The quantity is assumed to be in the item's default unit of measure. If this item has more than one stocking unit of measure or additional units of measure, you can specify a different unit of measure in the <i>U/M</i> field on this screen.</p> <p><i>Default Value:</i> 0.000</p> <p><i>Valid Values:</i> A positive number for purchases, a negative number for returns.</p>
U/M:	<p>Enter the unit of measure in which the item is being purchased or returned. If you leave this field blank, the system will select the default unit of measure, which will be one of the following:</p> <ul style="list-style-type: none">• the customer/item default unit of measure (if defined)• the item/warehouse unit of measure (if defined)• the default stocking unit of measure from Item
Price:	<p>If the <i>Override Price</i> field is set to N for your clerk ID through Application Action Authority, this field is display-only. If this field is display-only and you need to override the price, you must press the F5 function key and provide an authorization code to make this field available. This field is always available, and required, if the <i>Override Price</i> field is set to Y for your clerk ID.</p> <p>This field displays the price per unit for this item and unit of measure. The price will be in either the pricing U/M from the Item Master default or ordering U/M default, based on the settings in Order Entry Options for the store's company.</p>

Enter Order/Enter Return Item Review Screen Fields and Function Keys

Field/Function Key: Description

(Line Type)

If the line is flagged as a particular type (will call, pickup/delivery, special order, or drop ship), the type selected will display on the screen to the right of the *Price* heading. If the item is being transferred from an alternate warehouse, Transfer From and the warehouse number will be shown.

You can change the item's line type via the F18=LINE TYPE function key.

Override Disc%:

This field appears only if the *Override Price* field is set to Y for your clerk ID through Application Action Authority. If this field does not appear (because the *Override Price* field is set to N for your clerk ID) and you need to enter a discount, you must press the F5 function key and provide an authorization code to make this field available.

This field determines the percentage to discount this item. The item's final price will be calculated by multiplying the item's unit price by the quantity and subtracting the override discount percent.

If an override discount percent is entered, the line item's price will be marked as overridden and will prevent the line item from being combined with another line item on the order.

List:

This field displays the list price for the item based on the customer's price list.

Enter Order/Enter Return Item Review Screen Fields and Function Keys

Field/Function Key: Description

Item Description: Use this field to modify the description of the item for this transaction. Changing the description only changes the description for this transaction; it will not change the description in the Item Master File.

Total Amt: This field displays the total amount of all units of the item ordered.

Price List: Use this field to enter the price list that you want to use to price the item. Each item can be assigned up to five list prices.

Default Value: The price list code assigned to the customer through Customer/Ship to Master Maintenance (MENU ARFILE) or the Redirect Price List determined by contract pricing or price matrix pricing, if the Order Entry Options (MENU XAFILE) are set to use it for the store's company.

Cost: This field appears only if the *View Cost* field is set to Y for your clerk ID through Application Action Authority. If this field does not appear (because the *Override Price* field is set to N for your clerk ID) and you need to override the cost, you must press the F5 function key and provide an authorization code to make this field available.

This cost field represents the unit cost of the item. The cost is determined as the average, standard, or user cost for this item in this warehouse as defined through Item Balance Maintenance. The cost used (average, standard, or user) is based on the settings in Order Entry Options for the store's company.

Enter Order/Enter Return Item Review Screen Fields and Function Keys

Field/Function Key: Description

Tax Code: Use this field to specify the tax-exempt code for this item. Key 0 if this item is taxable on this order. However, for jobber orders, if the *Re-use* field is set to N, the item is not taxable, even when 0 is specified in this field.

Key 1, 2, or 3 if this item is tax exempt in one of three categories. You define what type of tax exemption each of these categories represents.

Re-use: This field appears only if the *Use Re-usable Item Code* field is set to Y in Order Entry Options Maintenance and the *Sales Tax Code* field is set to J (for Jobber) through Customer/Ship to Maintenance for the customer for whom the order is being entered. You can change the sales tax code for a customer on the POS Header Screen.

This field indicates whether this item is taxable for jobber orders.

If this field is set to Y, and the *Tax Code* field is set to

- 0, then the item will be taxed
- 1,2, or 3, then the item will not be taxed

If this field is set to N, the item is not re-usable and will not be taxed.

Enter Order/Enter Return Item Review Screen Fields and Function Keys

Field/Function Key: Description

Original POS Store: If the *Original Order Info Required* field is set to Y through Application Action Authority, this field is required; otherwise, it is optional.

Use this field to specify the original store from which the items being returned were purchased.

If you specify the original store in this field, you must specify the original POS order number in the *Original POS Order* field, and vice versa.

If you leave this field and the *Original POS Order* field blank, you will be prompted to enter an authorization code before you can continue with the return.

Original POS Order: If the *Original Order Info Required* field is set to Y through Application Action Authority, this field is required; otherwise, it is optional.

Use this field to enter the original POS order number associated with the customer and the items being returned.

If you specify the original POS order number in this field, you must specify the original store in the *Original POS Store* field, and vice versa.

If you leave this field and the *Original POS Store* field blank, you will be prompted to enter an authorization code before you can continue with the return.

Enter Order/Enter Return Item Review Screen Fields and Function Keys

Field/Function Key: Description

Reason:	Use this field to change or review the return reason code. The return reason code is used to determine whether or not to return items to inventory. Return to stock codes are assigned to return reason codes through Return Reason Code Maintenance.
F2=WHS:	This function key appears only when alternate warehouses are available for the item. Press this function key to display alternate warehouses for the item. The Alternate Warehouse Selection Screen appears. If you are selecting a warehouse for a special order line item, the warehouse you select on the Alternate Warehouse Selection Screen will be the “from” warehouse vendor for the transfer.
F6=Inq:	Press this function key to display additional function keys that allow you to access various inquiries and change the POS Entry mode.
F9=Assignments:	This function key appears only if you have ordered a lot/ serial item and entered a lot/serial number on the Lot/ Serial Entry Screen. Press this function key to review lot/serial information that was previously entered for the selected item. The Lot/Serial Assignments Screen appears.
F10=Chk Out:	This function key appears only after a line item has been added to the order or return. Press this function key to indicate that you have finished entering the order or return and are ready to complete the transaction. If the order contains pickup/delivery items, the Shipping Information Screen appears; otherwise, the Check Out Screen appears.
F12= Return:	Press this function key to return to the Enter Order/Enter Return Screen without adding the item to the order or return, or, if you selected an existing item to review, without saving your changes.
F18=Line Type:	Press this function key to access the Line Type Screen, where you can specify what type of line this item is.

Enter Order/Enter Return Item Review Screen Fields and Function Keys

Field/Function Key:	Description
---------------------	-------------

F24=Delete:	<p>This function key appears only when you have selected a line item to change. Press this key to delete the selected line item. If you are deleting an item, a special charge, or a comment, your clerk ID must be set to allow you to cancel lines. If you are not authorized to delete lines, you must provide an authorization code to delete the line.</p> <p>If you delete a line item and that line item is the only line item on the order or return, the order or return is deleted as well.</p>
-------------	---

Line Selection Screen

Session A - [24 x 80]

File Edit View Communication Actions Window Help

Cust: 3005 ANAHEIM NON-TRD TAX ENTER ORDER
Order: 5030721 Store: 05 Clerk: KEMOUD Sub-Total: 61.32

Item & Description	Quantity	U/M	Final Price	Tot Amt
1 11534P 8.5x11-24# Classic Linen Whitestone 12M	1.000	PKG	30.66000	30.66
2 11534W 8.5x11-24# Classic Linen Indigo Ice 12M	1.000	PKG	30.66000	30.66

LINE SELECTION

Sel: _
Find:

F12=Return

18/020

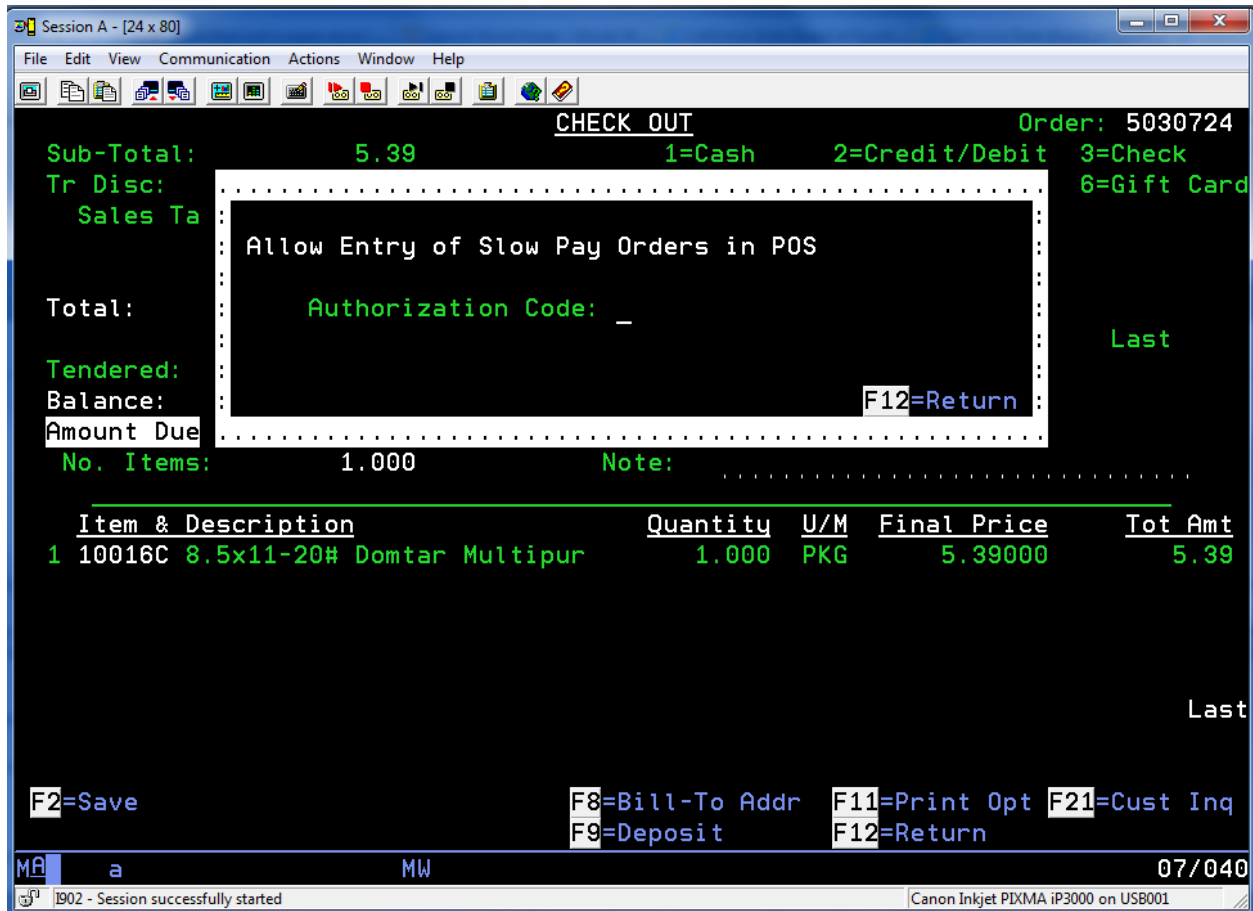
1902 - Session successfully started Canon Inkjet PIXMA iP3000 on USB001

This screen appears after you press F13 on the Enter Order/Enter Return Screen. Use this screen to select an item on the transaction to change or delete it.

Line Selection Screen Fields and Function Keys

Field/Function Key:	Description
Sel:	Use this field to specify which line item on the order you want to select. Key the reference number associated with the line item you want to select.
Find:	Use this field to find a line item on the order that you want to select. Key a partial or complete item number to find a specific item on the order.
F12=Return:	Press this function key to return to the Enter Order/Enter Return Screen.
Enter:	Press this key to confirm your entries. If you keyed a reference number in the <i>Sel</i> field for: <ul style="list-style-type: none">• an item, the Enter Order/Enter Return Item Review Screen appears• a special charge, the Special Charge Screen appears• a comment, the Comments Screen appears If you keyed search criteria in the <i>Find</i> field, the screen refreshes and the line item that matches the criteria you entered displays at the top of the list.

Authorization Screen



This screen appears when a charge account is past due or over the account credit limit. It will also appear when attempting to process an unauthorized charge transaction.

You must call the credit department to authorize this type of transaction. If it is a Saturday or the credit department is unavailable enter one of the following authorization codes to complete the transaction. Check with your store manager to identify the correct code for your location:

1. AA
2. BB
3. CC
4. DD
5. EE
6. FF

Authorization Screen Fields and Function Keys

Field/Function Key	Description
Authorization Code	Use this field to enter the authorization code that will allow the transaction you attempted when this screen appeared. Providing the authorization code overrides your clerk security, which is prohibiting the transaction.
F12=Return	Press this function key to return to the previous screen without authorizing the transaction.
Enter	Press this key to confirm your entry and continue with the transaction.

Special Charge Screen

Session A - [24 x 80]

File Edit View Communication Actions Window Help

Cust: 3005 ANAHEIM NON-TRD TAX ENTER ORDER
 Order: 5030721 Store: 05 Clerk: KEMOUD Sub-Total: 132.64

Item & Description	Quantity	U/M	Final Price	Tot Amt
1 11534P 8.5x11-24# Classic Linen Whitestone 12M	3.000	PKG	30.66000	91.98
2 11534W 8.5x11-24# Classic Linen Indigo Ice 12M	1.000	PKG	30.66000	30.66
3 Freight Charge (No Tax)				10.00

----- Last

SPECIAL CHARGE

Sel: 3 Amount Charge Description
 Find 10.00 Freight Charge (No Tax)

Order/Line: 0 Charge Code? 1 Tax Code: 1

F12=Return
 F24=Delete

MA a 19/019
 1902 - Session successfully started Canon Inkjet PIXMA iP3000 on USB001

This screen appears after you press F4 on the Enter Order/Enter Return Screen. Use this screen to enter special charges for the order or return. Special charges might include a fee for freight, handling, or packaging. You can add special charges to a line item or to the entire order/return.

Special Charge Screen Fields and Function Keys

Field/Function Key:	Details
Amount:	Use this field to specify the amount of the special charge. If the special charge is for a return, enter a negative amount in this field to credit the special charges on the original order. However, if you are entering a charge similar to a re-stock charge for a return, enter a positive amount so that full credit is not issued.
Charge Description:	Use this field to provide a description of the special charge.
Order/Line:	Use this field to indicate the type of special charge you are adding. This field is used in conjunction with the <i>Charge Code</i> field to determine which charge to apply. <ul style="list-style-type: none">• Key O if the special charge applies to the entire order.• Key L if the special charge applies to a line item. The special charge applies to the line item immediately preceding the special charge.
Charge Code:	Use this field to enter the special charge code that represents the charge you want to add. This field is used in conjunction with the <i>Order/Line</i> field to determine which charge to apply. <p>NOTE: If you use the '?' feature, then you should key in the special charge type (in the <i>Order/Line</i> field) to view the correct special charge codes. If left blank, 'L' is used as the default.</p>
Tax Code:	Use this field to specify the tax exemption code for the special charge. <ul style="list-style-type: none">• If this special charge is taxable, enter 0.• If this special charge is exempt, enter 1, 2, or 3 to• Indicate the category in which it is exempt.
F12=Return:	Press this function key to return to the Enter Order/Enter Return Screen without saving your entries.
F24=Delete:	This function key appears only if you selected an existing special charge line from the Enter Order/Enter Return Screen. Press this function key to delete the special charge.
Enter:	Press this key to add the special charge. You are returned to the Enter Order/Enter Return Screen and a line is added to the order for the special charge.

8/20/2013

31

Comments Screen

Session A - [24 x 80]

File Edit View Communication Actions Window Help

Cust: 3005 ANAHEIM NON-TRD TAX ENTER ORDER
 Order: 5030721 Store: 05 Clerk: KEMOUD Sub-Total: 132.64

Item & Description	Quantity	U/M	Final Price	Tot Amt
1 11534P 8.5x11-24# Classic Linen Whitestone 12M	3.000	PKG	30.66000	91.98
2 11534W 8.5x11-24# Classic Linen Indigo Ice 12M	1.000	PKG	30.66000	30.66
3 Freight Charge (No Tax)				10.00

Item Number COMMENTS

Order/Line: 0 Print on Receipt: Y Print on Invoice: Y Msg Cd? ...
 Ship order UPS Ground.

F2=Cust F5=Cmnts F7=Item F9=No Sale F13=Chg Line F15=Dr F12=Return
 F4=Chrgs F6=Inq F8=Bill-To F10=Chk Out F14=Head

MA a 19/032

1902 - Session successfully started Canon Inkjet PIXMA iP3000 on USB001

This screen appears after you press the F5 function key on the Enter Order/Enter Return Screen. Use this screen to enter or review comments for an order or return. The comments can pertain to an item on the order or to the entire order.

For example, you might want to add a comment to an order if a customer is purchasing an item that is damaged and you are selling it “as is”, or if it is a clearance item and cannot be returned. You can print comments on the receipt and/or on the invoice or have comments only shown internally.

Comment Screen Fields and Function Keys

Field/Function Key: Description

Order/Line:	<p>Use this field to indicate whether the comment is for the entire order or for a line on the order.</p> <p>If you key O, the comment applies to the entire order.</p> <p>If you key L, the comment applies to the line item immediately preceding the comment.</p>
Print on Receipt:	<p>This field determines whether the comment prints on the customer receipt. If you key Y in this field, the comment will print on the customer receipt.</p> <ul style="list-style-type: none">• If you key N in this field, the comment will not print on the customer receipt.
Print on Invoice:	<p>This field determines whether the comment prints on the customer invoice.</p> <p>If you key Y in this field, the comment will print on the customer invoice.</p> <ul style="list-style-type: none">• If you key N in this field, the comment will not print on the customer invoice.
Msg Cd:	<p>Use this field to specify the message code that represents the defined comment that you want to use. The message associated with the message code will be used.</p>
Comment:	<p>Use this field to enter the text of the comment. You can enter up to four lines of text; however, each line entered is stored as a separate line on the order.</p>
F12=Return:	<p>Press this function key to return to the Enter Order/Enter Return Screen without saving your changes.</p>
Enter:	<p>Press this key to save the comment and return to the Enter Order/Enter Return Screen.</p>

Item Search Screen

Session A - [24 x 80]

File Edit View Communication Actions Window Help

Cust: 3005 ANAHEIM NON-TRD TAX ENTER ORDER

Order: 5030721 Store: 05 Clerk: KEMOUD Sub-Total: 132.64

Item & Description	Quantity	U/M	Final Price	Tot Amt
1 11534P 8.5x11-24# Classic Linen Whitestone 12M	3.000	PKG	30.66000	91.98
2 11534W 8.5x11-24# Classic Linen Indigo Ice 12M	1.000	PKG	30.66000	30.66
3 Freight Charge (No Tax)				10.00
4 Ship order UPS Ground.				

Last

Item Number ITEM SEARCH

Find: #10-24 CLASSIC LINEN ENVELOPES

Item No: _ Class?

F2=Cust F5=Cmnts F7=Item F9=No Sale F13=Chg Line F15=Dr F12=Return
 F4=Chrgs F6=Inq F8=Bill-To F10=Chk Out F14=Head F24=Cncl

MA a 19/022

1902 - Session successfully started Canon Inkjet PIXMA iP3000 on USB001

This screen appears after you press the F7 function key on the Enter Order/Enter Return Screen. Use this screen to search for items. You can search using the description, item number, and/or item class and sub-class.

POS Item Search Screen Fields and Function Keys

Field/Function Key:	Description
Find:	Use this field alone or with the <i>Item No</i> and <i>Class</i> fields to search for an item. <ul style="list-style-type: none">If you do not recall the complete item number, key item description search criteria to activate the item search.
Item No:	Use in addition to or in place of the <i>Find</i> and <i>Class</i> fields to further limit the item for which you want to search. Key a partial item number.
Class:	Use this field alone or with the <i>Find</i> and <i>Item No</i> fields to search for an item. Enter the class of the item to search for items in that class. You can also enter a sub-class to further limit the search. For example, to search for items in class 50, you would enter 50. To search for items in class 50 and subclass 10, you would enter 5010, with no spaces or characters separating the class and sub-class. If you do not enter a sub-class, all sub-classes will be included in the search results.
F12=Return:	Press this function key to cancel the search and return to the Enter Order/Enter Return Screen.
Enter:	Press this key to search for items that match the criteria you specified. The <i>Item Description Search</i> screen appears. Refer to the Cross Applications User Guide for a description of this screen.

Customer Bill-To Address Screen

```
Session A - [24 x 80]
File Edit View Communication Actions Window Help
CUSTOMER BILL-TO ADDRESS

Customer Number:      3005
Name:                 ANAHEIM NON-TRD TAX
Contact:              .....
Address 1:            1405 SUNKIST ST
Address 2:            .....
Address 3:            .....
Address 4:            .....
City:                 ANAHEIM
St/Prov?              CA
Zip/Pstl:             92806          Country?
Phone 1:              (000) 000-0000   Extn: .....
Phone 2:              (000) 000-0000   Extn: .....
Fax:                  22                Extn: .....
Email Address:        .....

F12=Return
MA a 04/029
1902 - Session successfully started Canon Inkjet PIXMA iP3000 on USB001
```

This screen appears after you press the F8 function key on the Enter Order/Enter Return Screen. This screen displays the address of the customer for whom the order is being entered, as defined in Customer/Ship to Master Maintenance.

You can review the address information and make changes to it on this screen. If you override customer information on this screen, the override is stored with this order only. The customer information is not changed in Customer/Ship to Master Maintenance.

Customer Bill-To Address Screen Fields and Function Keys

Field/Function Key: Description

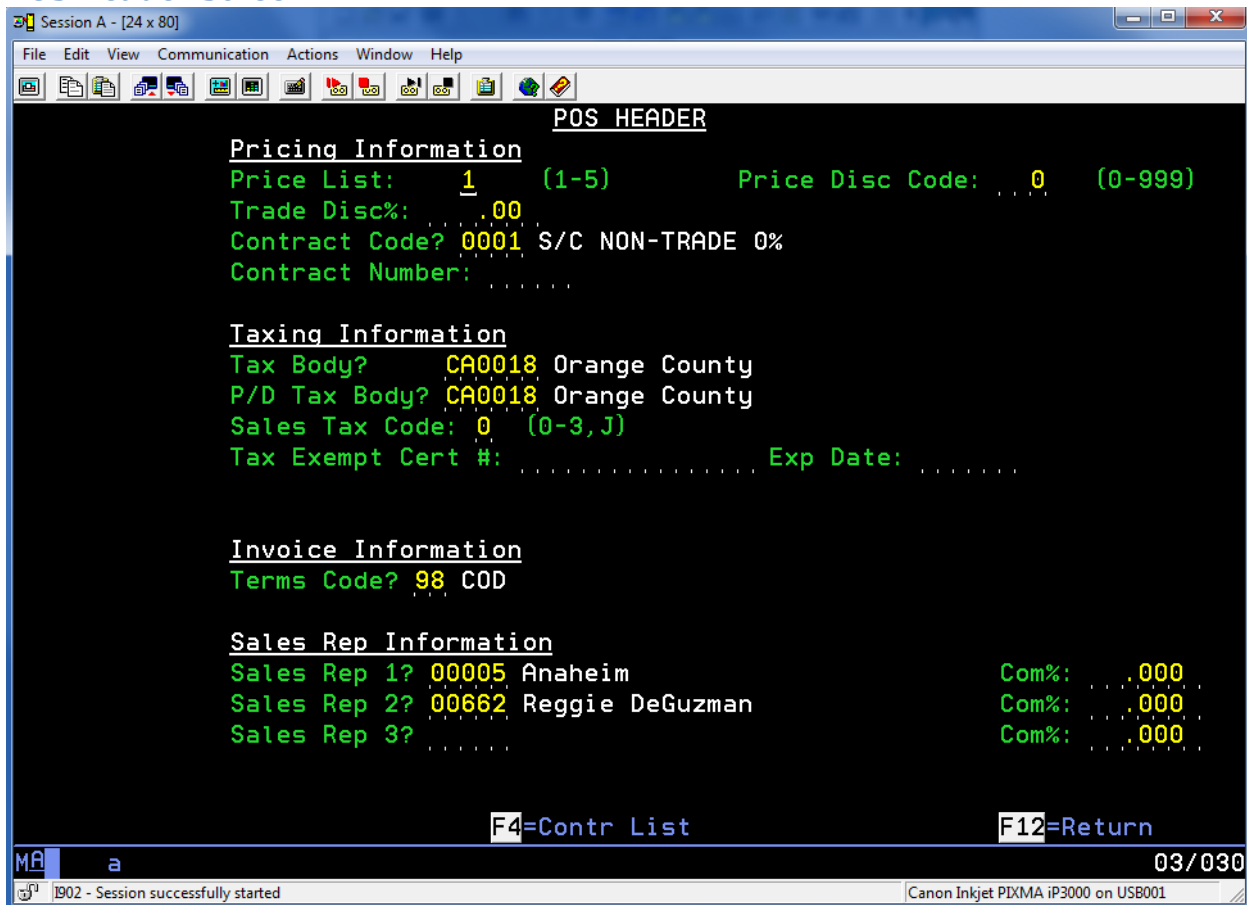
Customer Number:	<p>This field displays the number of the customer for whom the order/return is being entered and whose information is shown on this screen.</p> <p>If you have not selected a customer, this customer will be the default POS customer assigned to the store through Stores Maintenance. If you entered a customer number for the order on the POS Customer Search Screen or selected from the Customer Search Screen, that customer number will display in this field.</p>
Name:	<p>Use this field to specify the customer's name.</p> <p><i>Default Value:</i> The name specified for the customer through Customer/Ship to Master Maintenance.</p>
Contact:	<p>Use this field to specify the name of the contact person at the customer.</p> <p><i>Default Value:</i> The name of the contact specified in the <i>PO Contact</i> field in Customer/Ship to Master Maintenance.</p>
Address1-4:	<p>Use this field to enter address information for the customer, except for the city, state/province, country, and zip/postal code, which have separate fields. You can use the <i>Address 4</i> field only if 2 is selected in the <i>Form Type</i> field in System Options Maintenance</p> <p><i>Default Value:</i> The address specified for the customer through Customer/Ship to Master Maintenance.</p>
City:	<p>Use this field to enter the city for the address for this customer.</p> <ul style="list-style-type: none">• <i>Default Value:</i> The city specified for the customer through Customer/Ship to Master Maintenance.
St/Prov:	<p>Use this field to specify the customer's state or province.</p> <p><i>Default Value:</i> The state or province specified for the customer through Customer/Ship to Master Maintenance.</p>
Zip/Pstl:	<p>Use this field to specify the zip or postal code associated with the address for this customer.</p> <p><i>Default Value:</i> The zip or postal code specified for the customer through Customer/Ship to Master Maintenance</p>
CountryL	<p>Use this field to specify the code of the country associated with the address for this customer.</p> <p><i>Default Value:</i> The country specified for the customer through Customer/Ship to Master Maintenance.</p>

8/20/2013

37

Field/Function Key	Description
Phone 1-2:	<p>Use these fields to specify the contact phone numbers for this customer. This field has three parts:</p> <ul style="list-style-type: none"> • 3-character country access code • 20-character area code and telephone number • 4-character extension number For example, a number using all three parts would look like this: 011 (781) 555-1212 1289 • <i>Default Value:</i> The phone numbers specified in the <i>PO Phone</i> and <i>AP Phone</i> fields for the customer through Customer/Ship to Master Maintenance. The <i>Phone 1</i> field displays the number specified in the <i>PO Phone</i> field and the <i>Phone 2</i> field displays the number specified in the <i>AP Phone</i> field.
Fax:	<p>Use this field to specify the fax number for this customer. This field has three parts:</p> <ul style="list-style-type: none"> • 3-character country access code • 20-character area code and telephone number • 4-character extension number For example, a number using all three parts would look like this: 011 (781) 555-1212 1289
Email Address:	<p>Use this field to specify the e-mail address for e-mailing documents to this customer.</p> <ul style="list-style-type: none"> • <i>Default Value:</i> The e-mail address specified for the customer in the <i>Default Email Address</i> field through Customer/Ship to Master Maintenance.
F12=Return:	<p>Press this function key to return to the Enter Order/Enter Return Screen without saving changes.</p>
Enter:	<p>Press this key to confirm your changes. Your entries are saved and you are returned to the Enter Order/Enter Return Screen.</p>

POS Header Screen



This screen appears after you press the F14 function key on the Enter Order/Enter Return Screen. This screen displays information about the customer's pricing, taxing, invoicing terms, and sales representatives. This information was set up for the customer through Customer/Ship to Master Maintenance and for the store through Stores Maintenance.

You can only access this screen if the *Access to Header Price Info* field is set to Y for your clerk ID through Application Action Authority. If you are not permitted to access this screen, an authorization code can be used to override your security.

You can change any of the information on this screen; however, changes that you make on this screen only affect the current order or return. Changing customer information on this screen does not update the Customer Master File.

POS Header Screen Fields and Function Keys

Field/Function Key: Description

Price List: Each item can be assigned up to five list prices. Use this field to indicate which price list to use for this order. Key a price list code to specify which price list to use for this order. When you override the default value in this field, you are selecting to use item prices for this order that are not typically used for this customer. The code you specify here is used as the default for individual items added to this transaction.

- *Default Value:* The price list number assigned to the customer through Customer/Ship to Master Maintenance.
- *Valid Values:* A defined price list, referenced using numeric values from 1 - 5.

Price Disc Code: This is the price discount code [defined for a price class through Price Matrix Maintenance for the pricing matrix that you want associated with this customer. The use of the price matrix for pricing is determined by the settings for the store's company in Order Entry Options.

The code that you assign to this customer is used to classify the customer for Application Plus pricing functions using the price matrix. There are 999 possible customer price discount codes for discount, markup, and gross margin percentages that may be assigned to a customer.

Key the price discount code for this customer.

Default Value: The customer price discount class code assigned to the customer through Customer/Ship to Master Maintenance

Valid Values: 001-999

POS Header Screen Fields and Function Keys

Field/Function Key: Description

Trade Disc%: This field appears only if the *Use Trade Discounts* field is set to Y in Order Entry Options Maintenance. Use this field to specify the trade discount percent for this order. The trade discount is applied to the entire order on the Check Out Screen, if the total order value exceeds the invoice amount specified for the percent through Trade Discount Maintenance. *Default Value:* The trade discount percent defined through Trade Discount Maintenance and assigned to the customer through Customer/Ship to Master Maintenance.

Contract Code: Use this field to specify the contract code to classify the customer for contract pricing. Contracts are used for pricing only if the *Use Customer Contracts* field is set to Y through Order Entry Options Maintenance. This code is used for contract pricing and may categorize a group of customers that use the same contract pricing.

- *Default Value:* The customer contract code assigned to the customer through Customer/Ship to Master Maintenance.
- *Valid Values:* A customer contract code defined through Customer Contract Code Maintenance.

Contract Number: Use this field to specify the contract number used for customer pricing if contract pricing is used. If you leave this field blank, Application Plus will check to see if a Point of Sale contract was defined through Customer Contract Code Maintenance. If so, that contract will be used.

Tax Body: Use this field to specify the tax body that represents the tax jurisdiction for this order and customer. This tax body will be used for retail and will call items. For pickup/delivery items, refer to the *P/D Tax Body* field.

Default Value: The tax body code assigned to the store through Stores Maintenance for retail and will call items.

Valid Values: A tax body code defined through Tax Body Maintenance.

POS Header Screen Fields and Function Keys

Field/Function Key: Description

P/D Tax Body: Use this field to specify the tax body that represents the tax jurisdiction for the customer location to which pickup/delivery items will be delivered. This tax body will be used to calculate the sales tax value for pickup/delivery items on the order. For retail and will call items, refer to the *Tax Body* field.

- *Default Value:* The tax body code assigned to the store through Stores Maintenance.
- *Valid Values:* A tax body code defined through Tax Body Maintenance.

Sales Tax Code: Use this field to specify the tax code for this order. An item tax code and a re-use code assigned to individual items through Item Master Maintenance or Item Balance Maintenance are used together to determine which items on the order are taxable.

- If customer tax code is 1, 2, or 3, no items will be taxed.
- If customer tax code is 0, the Re-use code is ignored and
 - items with code 0 are taxed
 - items with code 1, 2, 3 are not taxed
- If customer tax code is J (for Jobber)
 - items with 0 codes and reuse code of Y are taxed
 - items with 0 codes and reuse code of N are not taxed
 - items with 1, 2, or 3 codes are not taxed

Tax Exempt Cert #: Use this field to specify the tax-exempt certificate number. It is recommended that you provide a tax exemption certificate number if the *Sales Tax Code* field is set to 1, 2, or 3.

- *Default Value:* The tax-exempt certificate number specified for the customer through Customer/Ship to Master Maintenance.

POS Header Screen Fields and Function Key

Field/Function Key Description

Key	Description
Exp Date:	<p>Use this field to specify the expiration date of the tax exempt certificate.</p> <ul style="list-style-type: none">• <i>Default Value:</i> The expiration date specified for the tax exempt certificate number for this customer through Customer/Ship to Master Maintenance.• <i>Valid Values:</i> A date keyed in the default date format specified for your user ID through Register APLUS User IDs, or if that field is blank, in the default date format specified for the system through System Options Maintenance.
Fed Excise Tax Code:	<p>This field is reserved for future use</p>
Terms Code:	<p>Use this field to specify the payment terms for orders billed to the house account for this customer.</p> <ul style="list-style-type: none">• <i>Default Value:</i> The accounts receivable terms code assigned to the customer in Customer/Ship to Master Maintenance.• <i>Valid Values:</i> A terms code defined through A/R Terms Code Maintenance.
Sales Rep 1-3:	<p>Only the first sales rep is required. The second and third sales rep fields are optional and can only be used if the <i>Allow Multiple Salesreps/Order</i> field is set to Y in Order Entry Options Maintenance.</p> <p>Use these fields to specify the sales representatives that will be credited for the order. For each sales rep number that you specify, you must use the corresponding <i>Com%</i> field to enter the commission for the rep.</p> <ul style="list-style-type: none">• <i>Default Value:</i> The number of the first, second, and third sales reps assigned to this customer through Customer/ Ship to Master Maintenance.• <i>Valid Values:</i> A sales representative code defined through Sales Rep Maintenance.

POS Header Screen Fields and Function Keys Field/Function

Key:	Description
Com%:	<p>Use these fields to specify the commission percentage received by each sales rep.</p> <p>NOTE: These fields are informational use only; Application Plus does not calculate sales rep commissions.</p> <ul style="list-style-type: none">• <i>Default Value:</i> The commission assigned to the corresponding sales rep through Sales Rep Maintenance.
F4=Contr List:	<p>Press this function key to display the contract pricing for this customer, if applicable. The <i>Contract File List</i> screen appears. Refer to the <i>Order Entry</i> manual for a description of this screen.</p>
F12=Return:	<p>Press this function key to return to the Enter Order/Enter Return Screen without saving your entries.</p>
Enter:	<p>Press this key to save any changes you made and return to the Enter Order/Enter Return Screen.</p>

Check Out Screen

Session A - [24 x 80]

File Edit View Communication Actions Window Help

CHECK OUT Order: 5030721

Sub-Total: 132.64
 Tr Disc: .00
 Sales Tax: 9.50

Payment: 1=Cash 2=Credit/Debit 3=Check
 4=On Acct 5=Store Credit 6=Gift Card
 9=CC Entry

Total: 142.14

Tendered: .00
 Balance: 142.14
 Amount Due: 142.14
 No. Items: 4.000

Selection: .. Last
 PO No:
 Note:

Item & Description	Quantity	U/M	Final Price	Tot Amt
1 11534P 8.5x11-24# Classic Linen W	3.000	PKG	30.66000	91.98
2 11534W 8.5x11-24# Classic Linen I	1.000	PKG	30.66000	30.66
3 Freight Charge (No Tax)				10.00
4 Ship order UPS Ground.				

Last

F2=Save F8=Bill-To Addr F11=Print Opt F21=Cust Inq
 F9=Deposit F12=Return

MR a 03/040
 B02 - Session successfully started Canon Inkjet PIXMA iP3000 on USB001

This screen appears after you press the F10 function key on the Enter Order/Enter Return Screen. Use this screen to finalize the transaction and apply payments. You can apply multiple payment types for each order.

Each payment type displays a popup screen where you must enter pertinent information for the payment type. When you get to this screen, Application Plus checks the customer's credit history. If there is a past-due payment or other credit issue, you will be prompted to enter an authorization code to continue.

You can save transactions from this screen, but only before you have applied any payment. For example, assume that a customer comes into the store and after processing the entire order; the customer realizes he/she does not have any money. You can save the order while the customer goes to get money.

A saved order receipt will print so that the customer knows the amount of the purchase. This allows you to continue to process orders for other customers. When the customer returns, you recall the order and process the payments.

The following information appears in the lower portion of this screen:

- the item number and description of each item on the order
- the quantity of each item on the order
- the unit of measure of each item on the order
- the final price (after charges, taxes, etc.) of each item on the order
- the total payment amount due from the customer for each item on the order

Check Out Screen Fields and Function Keys

Field/Function Key:	Description
----------------------------	--------------------

Pick/Del:	This field appears only if there are pickup/delivery items on the order. This field displays the total value of all pickup/delivery items on the order with sales tax and discounts applied.
Counter:	This field appears only if there are pickup/delivery items on the order. This field displays the total value of all retail and will call items on the order.
Order:	The order number assigned to this transaction displays in this field.
Sub-Total:	The sub-total of the items and charges displays in this field. The sub-total is the sum of the <i>Final Price</i> field for each item on the Enter Order/Enter Return Screen. This field appears only when there are no pickup/ delivery items on the order.
Tr Disc:	The amount of discount applicable to this transaction's retail and will call items displays in this field. A trade discount will apply if one is specified for the customer through Customer/Ship to Master Maintenance or if one is specified for this order on the POS Header Screen.
Sales Tax:	This field appears only if the tax body specified on the POS Header Screen has both the <i>Goods/ Services Tax</i> and <i>Provincial Sales Tax</i> fields set to N through Tax Body Maintenance. The total sales tax for the retail and will call items based on the tax parameters defined for the customer, item, and store displays in this field. Sales tax for pickup/ delivery items is included in the total shown in the <i>Pick/ Del</i> field.

Check Out Screen Fields and Function Keys

Field/Function Key:	Description
----------------------------	--------------------

Total:	The total for the goods purchased plus any taxes, minus any discounts displays in this field.
Deposit:	This field appears only if there are pickup/delivery items on the order or if you are processing a payment for an Order Entry order. This field displays the amount applied to pickup/ delivery items.
Tendered:	The amount that you have applied as payment to the sale displays in this field.
Balance:	This field displays the balance remaining for this order, which is calculated as: Total - Amount Tendered. The amount in this field will reflect the current balance as payments are applied.
Amount Due:	This field displays the amount due at check out, which is calculated as: <ul style="list-style-type: none">• Balance - Pick/Del + Deposit Amount• Checkout is complete when the amount due equals zero.
Items:	This field displays the total number of items on the order and gift cards issued.

Check Out Screen Fields and Function Keys

Field/Function Key:	Description
---------------------	-------------

Payment:	Use this field to specify how the customer is paying for the purchase. Once you enter a payment method, the payment fields for that payment method display in the lower portion of the screen.
----------	--

Selection:	This field appears in the top portion of the screen. Use this field to select a previously entered payment for maintenance or deletion. Key the reference number associated with the payment you want to select and press ENTER.
------------	--

PO No.:	This field is required if the <i>P/O Required</i> field is set to Y for the customer through Customer/Ship to Master Maintenance; otherwise, this field is optional. Use this field to specify a PO number.
---------	---

Note:	Use this field to enter any comments about the order.
-------	---

Selection:	This field appears in the bottom portion of the screen. Use this field to mark a line item in the list to print a gift receipt for that item. To print a gift receipt for specific items only, mark those items in the list and send the receipt to the printer via the F4 function key. This will print all marked items on one receipt.
------------	---

To print a gift receipt for an entire order, do not mark any line items in the list before you press the F4 function key. This will print one gift receipt for each unit of an item on the order. For example, if an order contains four sweaters and one jacket and you print gift receipts for the entire order, four gift receipts will print for the sweaters (one for each) and one gift receipt will print for the jacket. Only line items can be marked for gift receipt printing (not comments, charges, or gift cards).

Check Out Screen Fields and Function Keys

Field/Function Key: Description

- F2=Save: Press this function key to save the current order for later processing. You can only save an order that has not had payments applied. The Search Word Screen appears.
- F4=Gift Receipt: This key appears only if the *Print Receipt* field is set to Y in Terminals/Drawers Maintenance and the items on the order are all retail items.

Press this key to print gift receipts. A gift receipt contains the same information as a normal receipt except for the price paid for the item or the total quantity of items purchased. This allows your customers to include a gift receipt with the item when they give it as a gift. The gift recipient can then use that receipt when returning that item.

If you marked line items in the list at the bottom portion of this screen, one receipt will print containing all marked items.

If you did not mark any line items in the list at the bottom portion of this screen, one receipt will print for each unit of each line item on the order.
- F5=P/D Pay Type: This function key appears only if there are pickup/delivery items on the order. Press this function key to specify the pickup/delivery payment type for the pickup/delivery items on the order. The Pickup/Delivery Payment Type Screen appears.
- F7=Shipping Info: This function key appears only if there are pickup/delivery items on the order. Press this key to review shipping information for pickup/delivery item on the order. The Shipping Information Screen appears.
- F8=Bill-To Addr: Press this function key to view the customer's contact information (including address, phone number, and contact). The Customer Bill-To Address Screen appears.
- F9=Deposit: Press this key to specify the amount the customer is applying as a deposit for pickup/delivery items. If there are no pickup/delivery items in the order, you must specify a negative deposit amount (which indicates a return of a deposit).

Check Out Screen Fields and Function Keys

Field/Function Key:	Description
---------------------	-------------

F11=Print Opt:	Press this key to specify the printing location for the invoice, pick list, or acknowledgement. The Print Options Screen appears.
----------------	---

F12=Return:	Press this function key to return to the Enter Order/Enter Return Screen
-------------	--

F21=Cust Inq.:	This function key appears only if you are authorized to access the customer inquiry, as determined through Security Maintenance. Your POS sign on does not determine access to this feature.
----------------	--

Press this function key to access the customer inquiry, where detailed accounts receivable information for a customer is displayed.

F24=Cancel:	This function key appears only if you are processing a payment for an Order Entry order. Press this key to cancel the payment for the order. Pressing this key does not cancel or delete the order; it only cancels the payment transaction in this option.
-------------	---

Enter:	Press this key after entering a reference number in the <i>Selection</i> field to maintain the selected payment.
--------	--

Cash Payment Screen

Session A - [24 x 80]

File Edit View Communication Actions Window Help

Sub-Total: 132.64
Tr Disc: .00
Sales Tax: 9.50

Total: 142.14

Tendered: .00
Balance: 142.14
Amount Due: 142.14
No. Items: 4.000

Payment: 1

1=Cash 2=Credit/Debit 3=Check
4=On Acct 5=Store Credit 6=Gift Card
9=CC Entry

Order: 5030721

Selection: .. Last

PO No:
Note:

CASH

Amount Tendered: _

Note:

F12=Return

15/030

B02 - Session successfully started Canon Inkjet PIXMA iP3000 on USB001

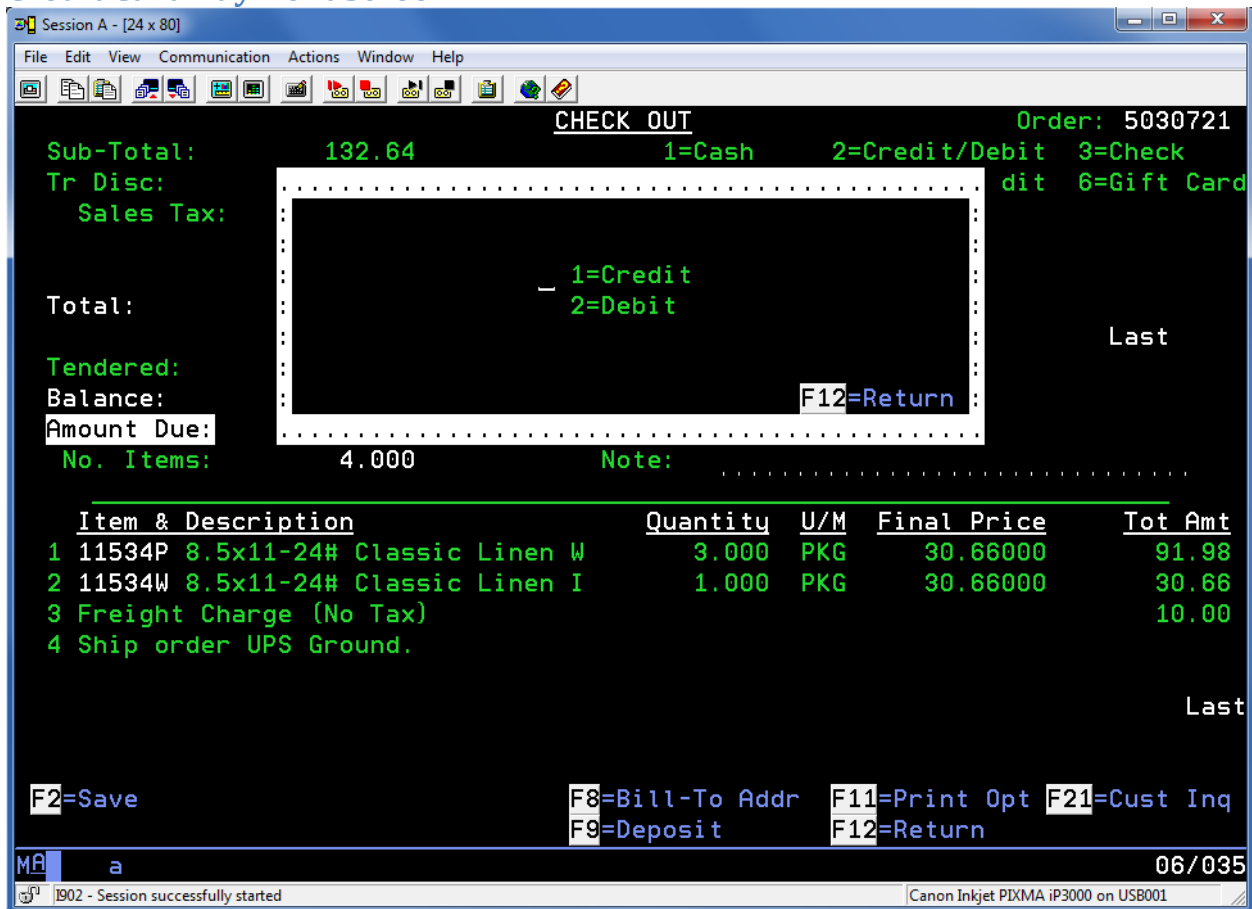
This screen appears when you key 1 in the *Payment* field on the Check Out Screen. Use this screen to enter the amount of cash the customer tendered.

Cash Payment Screen Fields and Function Key

Field/Function Key: Description

Amount Tendered:	Use this field to enter the amount of cash the customer wants to apply to the order balance. <ul style="list-style-type: none">• <i>Valid Values:</i> Any currency value, positive (or negative for return credit) other than 0.
Note:	Use this field to enter any notes that you want stored with this transaction.
F12=Return:	Press this function key to return to the Check Out Screen without saving your entries.
F24=Delete:	This function key appears only if you select an existing payment from the Check Out Screen. Press this function key to delete the payment entry. You will be asked to confirm the deletion.
Enter:	Press this key to save the information you entered and return to the Check Out Screen. The <i>Tendered</i> and <i>Balance</i> fields will be updated with the payment information.

Credit Card Payment Screen



This screen appears when you key 2 in the *Payment* field on the Check Out Screen. Use this screen to enter the customer's credit card payment information.

Credit Card Payment Screen Fields and Function Keys

Field/Function Key	Description
---------------------------	--------------------

Amount Tendered	Use this field to enter the amount that will be charged to the credit card. <i>Default Value:</i> The balance due. <i>Valid Values:</i> Any currency value, positive (or negative for return credit) other than 0.
-----------------	--

Field/Function Key:	Description
----------------------------	--------------------

Credit Card Number:	This field appears only when credit cards are being entered manually, not swiped (manual entry is active when the F2=Swipe Entry function key is shown). Use this field to enter the credit card number to which the charge will be applied.
---------------------	--

NOTE: The credit card number you specify in this field will not be encrypted on the receipt if Electronic Payments is not installed and activated. If you only want the last four digits of the credit card number to appear on the receipt, key only the last four digits of the credit card number in this field.

Expiration Date:	This field appears only for credit card payments. This field appears only when credit cards are being entered manually, not swiped (manual entry is active when the F2 =Swipe Entry function key is shown).
------------------	---

Use this field to enter the month and year of the expiration date of the credit card.

- *Valid Values:* A future date in MMY format.

Auth Code:	This field appears only if you are processing credit card transactions outside of Application Plus. Use this field to provide a transaction authorization code for the credit card transaction. If you are crediting a credit card for a return and you are using the phone authorization mode, this field must be blank.
------------	--

Credit Card Payment Screen Fields and Function Keys

Field/Function Key: Description

Auth Mode: This field appears only for credit card transactions. If you specify an authorization code that has the *CC Auth Mode* field set to Y through authorization Codes Maintenance, you can override the default authorization mode in this field; otherwise, this field is display only. Use this field to specify the authorization mode to use to authorize this credit card transaction.

- Key 1 to use online authorization.
- Key 2 to use phone authorization.
- Key 3 to use manual authorization.
 - If you key 2 or 3 in this field, an authorization code must be entered in the *Auth Code* field.
- *Default Value:* The default authorization method set for this store through Merchant ID Overrides Maintenance or, if none is defined there, 1 is the default.

Card Holder Name: This field appears only for credit card payments if *Electronic Payments* has been activated through Activate Credit Card Company Options for this store's company.

This field appears only when credit cards are being entered manually, not swiped (manual entry is active when the F2=Swipe Entry function key is shown).

Use this field to enter the name of the credit card holder as it appears on the credit card.

AVS Address: This field appears only for credit card payments if *Electronic Payments* has been activated through Activate Credit Card Company Options for this store's company.

This field appears only when credit cards are being entered manually, not swiped (manual entry is active when the F2=Swipe Entry function key is shown).

Use this field to enter the cardholder's address information for the Address Verification Service (AVS).

Credit Card Payment Screen Fields and Function Keys

Field/Function Key	Description
AVS Zip Pstl	<p>This field appears only when credit cards are being entered manually, not swiped (manual entry is active when the F2=Swipe Entry function key is shown).</p> <p>Use this field to enter the zip or postal code of the cardholder's address for the Address Verification Service (AVS).</p>
Credit Verification Value:	<p>This field appears only for credit card payments if <i>Electronic Payments</i> has been activated through Activate Credit Card Company Options for this store's company.</p> <p>This field appears only when credit cards are being entered manually, not swiped (manual entry is active when the F2=Swipe Entry function key is shown).</p> <p>Use this field to enter the credit verification value (CVV). CVV is a number that is printed (not embossed) on the credit card. Because it is not part of the actual credit card number, you must actually have the card to view the CVV number. It is an extra security measure for using credit cards. Your company's business process dictates whether you will use this or not.</p>
F2=Manual Entry/ Swipe Entry:	<p>This function key appears only for credit card payments if <i>Electronic Payments</i> has been activated through Activate Credit Card Company Options for this store's company.</p> <p>This function key is a toggle that allows you to toggle between manual entry of the credit card information and automatic entry by swiping the credit card. The fields that display on this screen vary based on which entry method is active.</p>

Credit Card Payment Screen Fields and Function Keys

Field/Function Key:	Description
F4=List:	Press this function key to view a list of valid credit cards for this customer. The Credit Card List screen appears. Refer to the <i>Electronic Payments</i> supplement for a description of this screen.
F5=Authorization:	This function key appears only for credit card, on account, or store credit payments. If there is a problem with the customer's account, a message will display and a manager will have to authorize or approve the order. For credit card payments, if you want to override the default credit card authorization mode, you must press this key to specify an authorization code that allows you to. (Note that this is not the credit card authorization process.) Press this function key to access the Authorization Screen
F12=Return:	Press this function key to return to the Check Out Screen without saving your entries.
F24=Delete:	This function key appears only if you select an existing payment from the Check Out Screen. Press this function key to delete the payment entry. You will be asked to confirm the deletion.
Enter:	Press this key to save the information you entered and return to the Check Out Screen. The <i>Tendered</i> and <i>Balance</i> fields will be updated with the payment information. For manually entered credit card information, pressing ENTER will submit the credit card authorization to the network.

Check Payment Screen

Session A - [24 x 80]

File Edit View Communication Actions Window Help

CHECK OUT Order: 5030721

Sub-Total: 132.64 1=Cash 2=Credit/Debit 3=Check
Tr Disc: .00 Payment: 3 4=On Acct 5=Store Credit 6=Gift Card
Sales Tax: 9.50 9=CC Entry

Total: 142.14

Tendered: .00 Selection: .. Last
Balance: 142.14
Amount Due: 142.14 PO No:
No. Items: 4.000 Note:

CHECK

Amount Tendered: 142.14
Phone Number:
Drivers License:
Check Number:
Note:

F12=Return

MA a 15/030
1902 - Session successfully started Canon Inkjet PIXMA iP3000 on USB001

This screen appears when you key 3 in the *Payment* field on the Check Out Screen. Use this screen to enter the customer's check payment information.

Check Payment Screen Fields and Function Keys

Field/Function Key:	Description
Amount Tendered:	Use this field to enter the amount for which the check was written. <ul style="list-style-type: none">• <i>Default Value:</i> The balance due.
Phone Number:	Use this field to enter the customer's phone number.
Drivers License:	Use this field to enter the customer's drivers license number.
Check Number:	Use this field to enter the number of the customer's check.
Note:	Enter any special notes about this check transaction.
F12=Return:	Press this function key to return to the Check Out Screen without saving your entries.
F24=Delete:	This function key appears only if you select an existing payment from the Check Out Screen. Press this function key to delete the payment entry. You will be asked to confirm the deletion.
Enter:	Press this key to save the information you entered and return to the Check Out Screen. The <i>Tendered</i> and <i>Balance</i> fields will be updated with the payment information.

On Account Screen

Session A - [24 x 80]

File Edit View Communication Actions Window Help

CHECK OUT Order: 5030721

Sub-Total: 81.32 1=Cash 2=Credit/Debit 3=Check
Tr Disc: .00 Payment: 4 4=On Acct 5=Store Credit 6=Gift Card
Sales Tax: .00 9=CC Entry

Total: 81.32 Last

Tendered: .00 Selection: ..
Balance: 81.32
Amount Due: 81.32 PO No: 12497
No. Items: 4.000 Note:

806: This customer requires a PO Number.

ON ACCOUNT

Receivable Amount: 81.32
Terms Code? 06 1% Net 10

Note:

F12=Return

MA a 15/030

1902 - Session successfully started Canon Inkjet PIXMA iP3000 on USB001

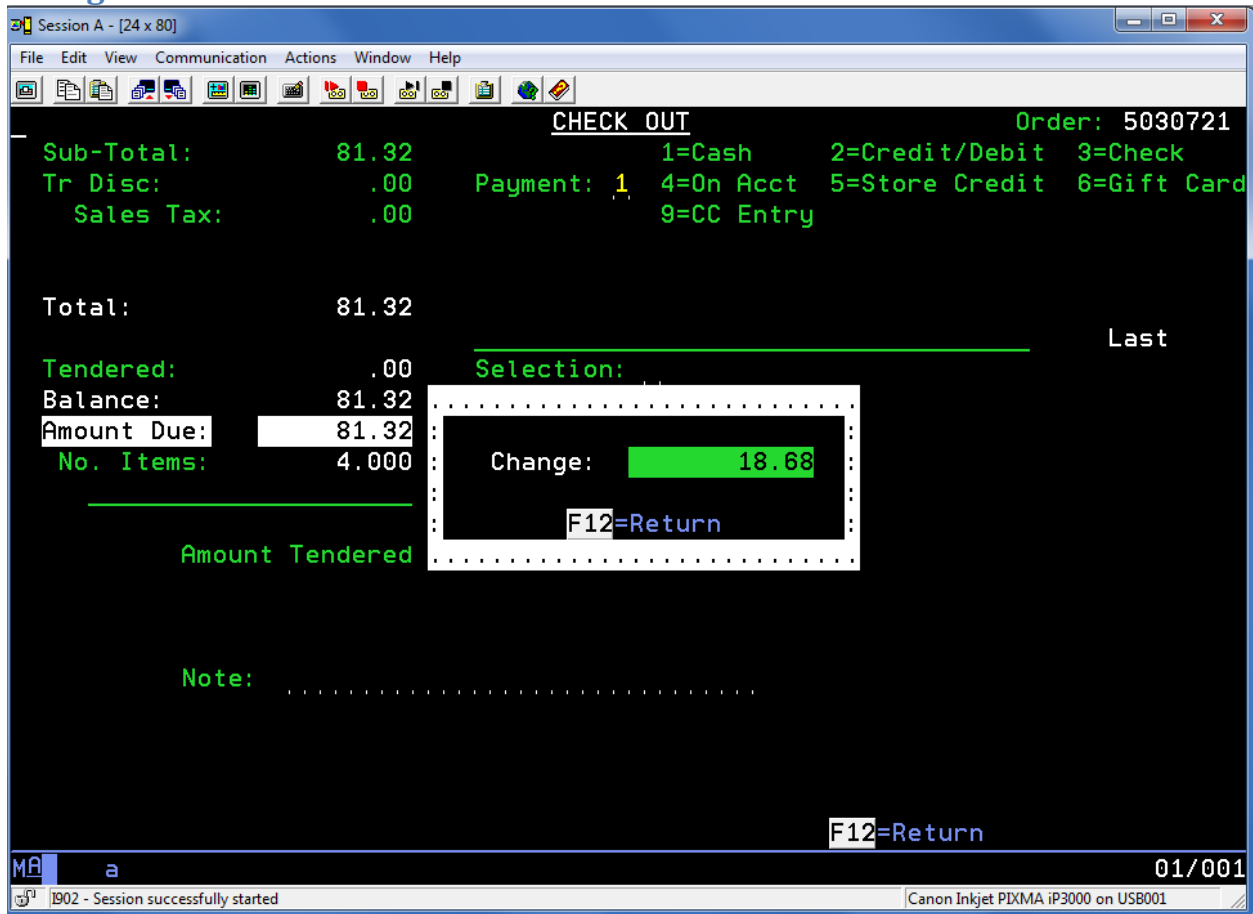
This screen appears when you key 4 in the *Payment* field on the Check Out Screen. You cannot select the on account payment method for the default POS customer.

Use this screen to enter the customer's on account payment information. If the customer has exceeded their credit limit, a message will appear on this screen and an authorization code must be entered to continue with the transaction.

On Account Screen Fields and Function Keys

Field/Function Key:	Description
Receivable Amount:	Use this field to enter the amount that the customer wants to put on their account. You cannot enter an amount greater than the total amount due. <ul style="list-style-type: none">• <i>Default Value:</i> The balance due.
Terms Code:	Use this field to specify the payment terms for this customer. <ul style="list-style-type: none">• <i>Default Value:</i> The terms code assigned to the customer on the POS Header Screen.• <i>Valid Values:</i> A terms code defined through A/R Terms Code Maintenance.
Note:	Enter any special notes about this transaction.
F5=Authorization:	If there is a problem with the customer's account, a message will display and you will have to authorize the order. Press this function key to access the Authorization Screen.
F12=Return:	Press this function key to return to the Check Out Screen without saving your entries.
F24=Delete:	This function key appears only if you select an existing payment from the Check Out Screen. Press this function key to delete the payment entry. You will be asked to confirm the deletion.
Enter:	Press this key to save the information you entered and return to the Check Out Screen. The <i>Tendered</i> and <i>Balance</i> fields will be updated with the payment information.

Change Screen



This screen appears after you specify payment information and press ENTER on one of the payment screens. This screen displays the amount of change that is due to the customer.

Change Screen Fields and Function Keys

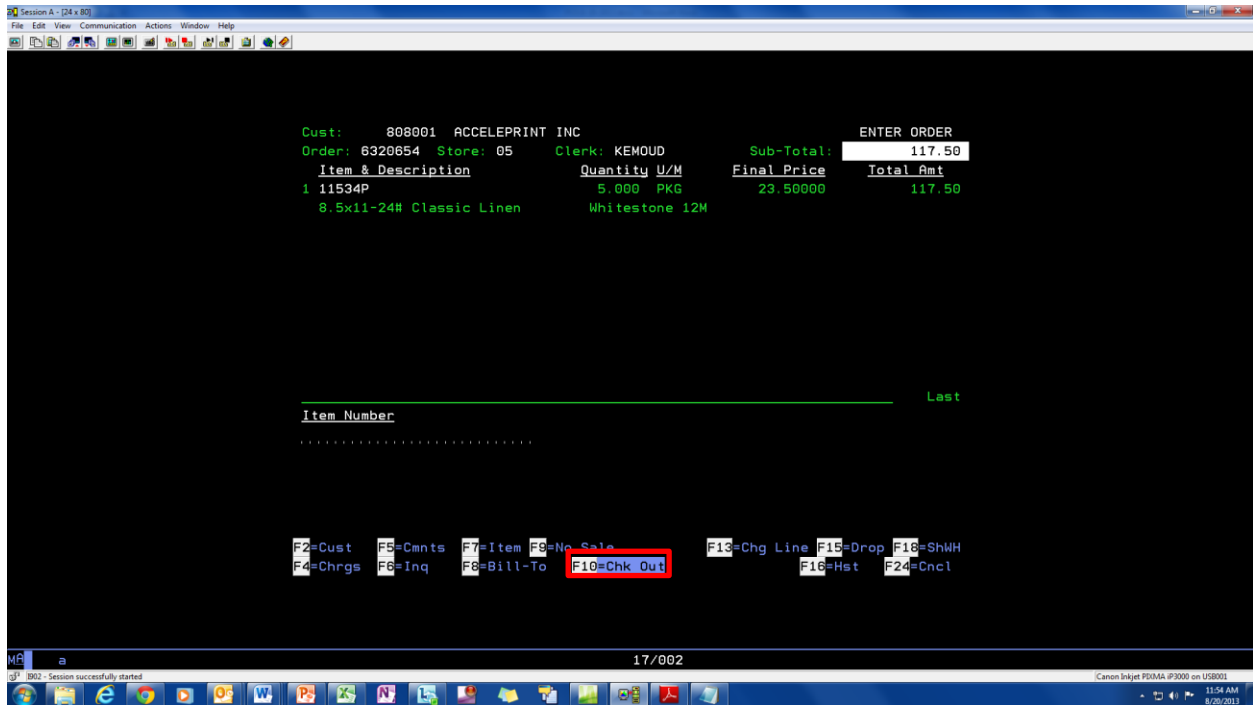
Field/Function Key:	Description
Change:	This field displays the amount of change that is due to the customer.
F5=Reprint:	This function key appears only after you press <code>ENTER</code> on this screen if the Print Receipt field is set to <code>Y</code> for this terminal through Terminals/Drawers Maintenance. Press this function key to reprint the customer's receipt.
F10=Continue:	<p>This function key appears only after you press <code>ENTER</code> on this screen if the Print Receipt field is set to <code>Y</code> for this terminal through Terminals/Drawers Maintenance.</p> <p>Press this function key after you have given the customer his/her change to complete the transaction and return to the POS Customer Search Screen or the Enter Order/Enter Return Screen.</p>
F12=Return:	This function key appears only if you have not pressed <code>ENTER</code> on this screen. Press this key to return to the previous screen to change the payment you are entering.
Enter:	Press this key to continue. The F5 and F10 function keys appear if the Print Receipt field is set to <code>Y</code> for this terminal through Terminals/Drawers Maintenance. Otherwise, you are returned to the POS Customer Search Screen or the Enter Order/Enter Return Screen.

Working with Saved Transactions

Saved transactions are orders or returns that have been added through Point of Sale Entry but have not had payments or credits applied.

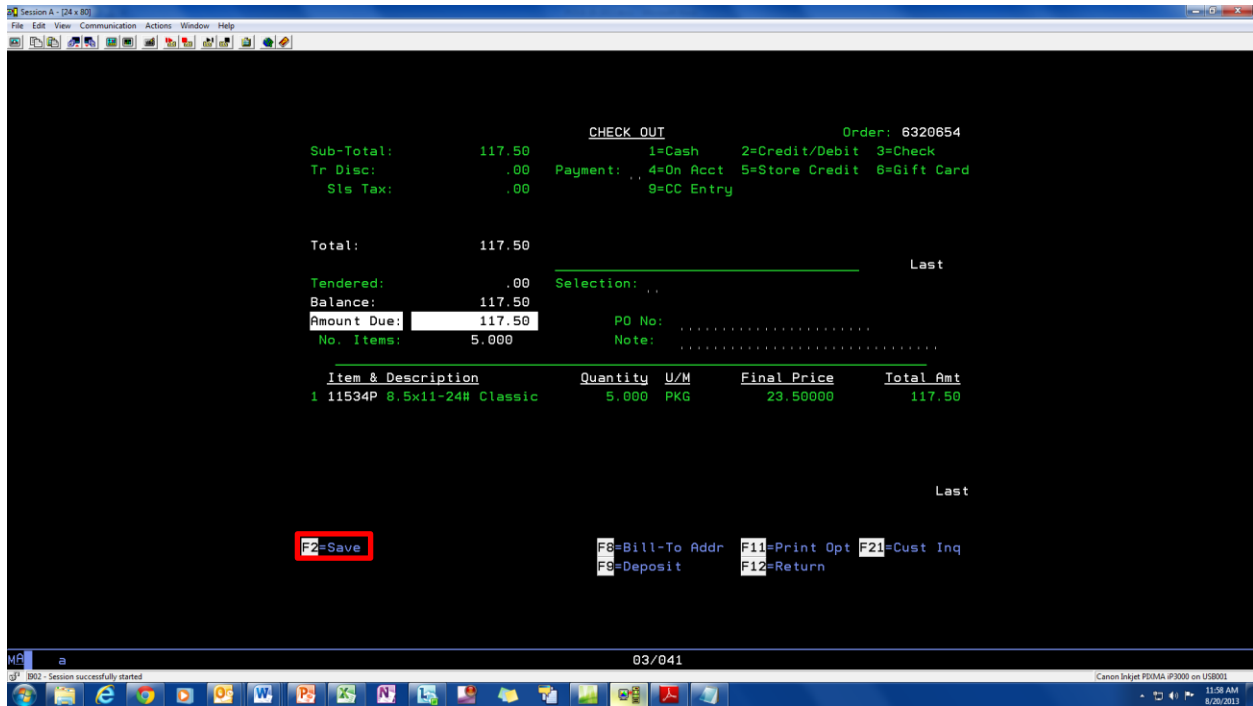
Entering the transaction

You can perform all of the regular tasks with a transaction that will be saved, except apply payments or credits.

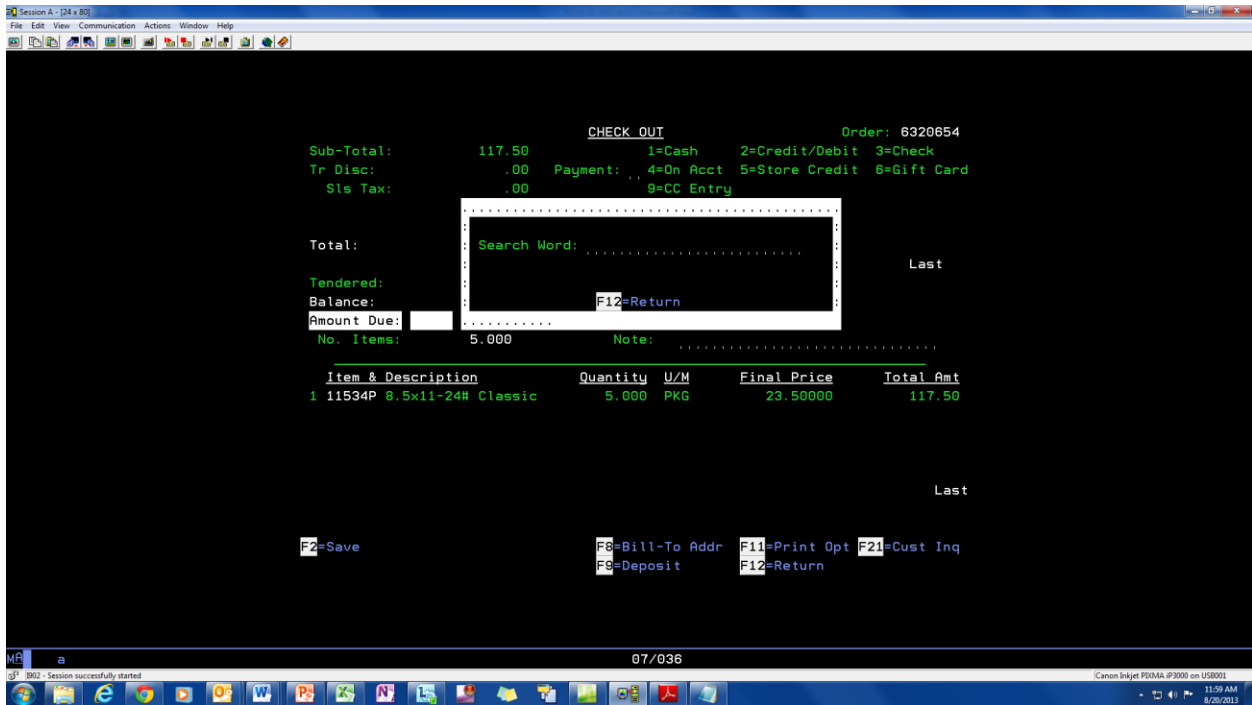


To save the transaction proceed to the check-out screen by hitting F10

Saving the transaction



To save a transaction, press F2 from the Check-Out Screen.



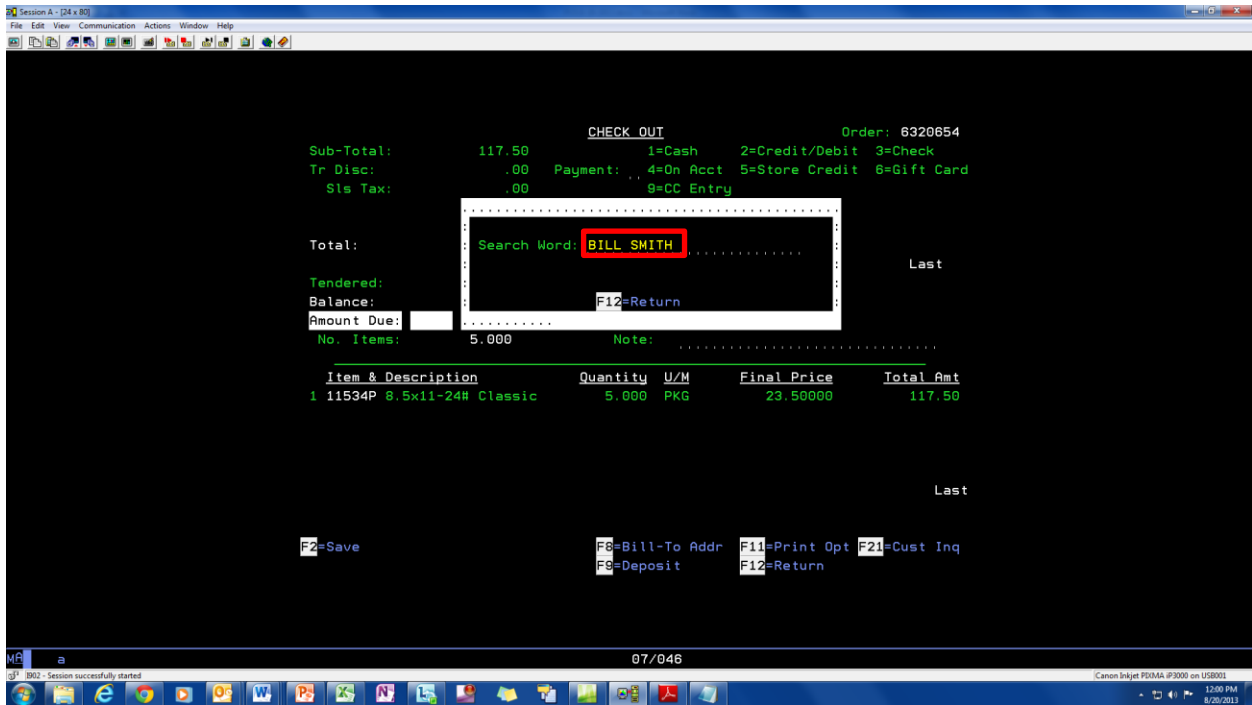
The Search Word box appears.

8/20/2013

67

KELLY | PAPER®

A+ Documentation



On the Search Word Screen, provide a key word to help locate the transaction at a later time press ENTER to save the transaction.

A saved order receipt will print. The saved order receipt contains the items ordered/returned and the key word to facilitate finding the transaction to complete it at a later time.

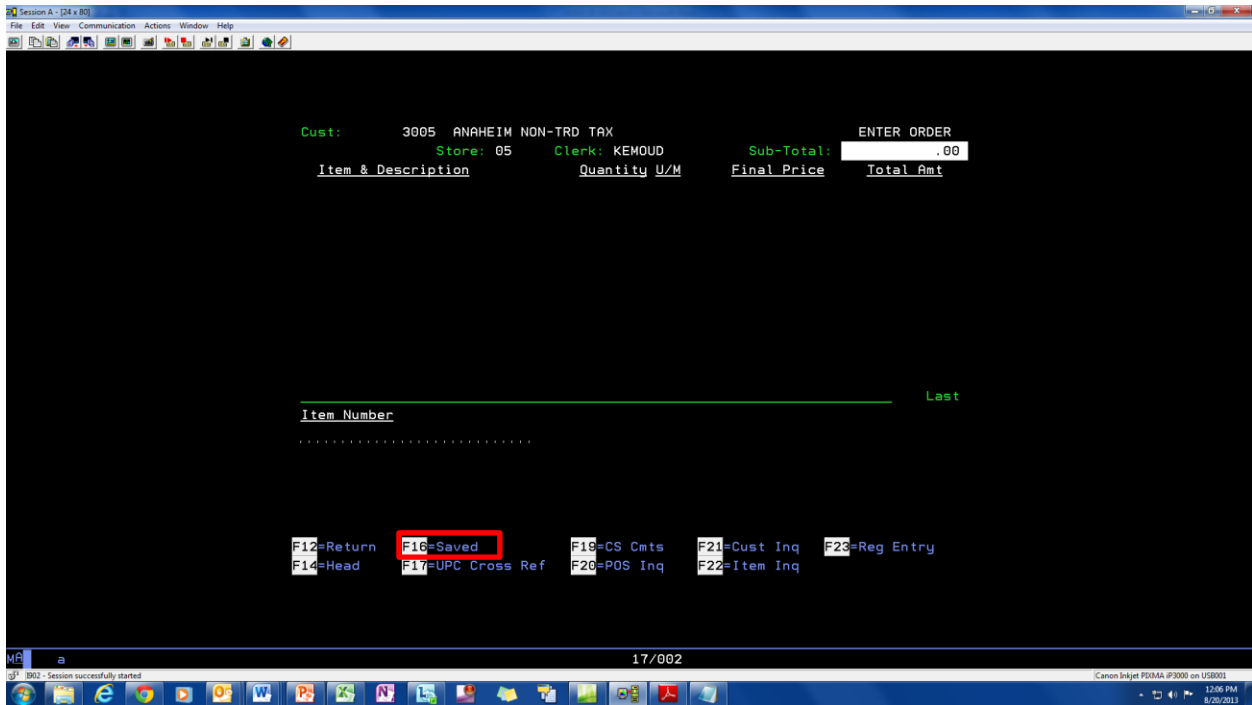
Recalling and completing the transaction.

The purpose of saving a transaction is to recall it at a later time. When the customer returns to complete the transaction, sign on to Point of Sale Entry.

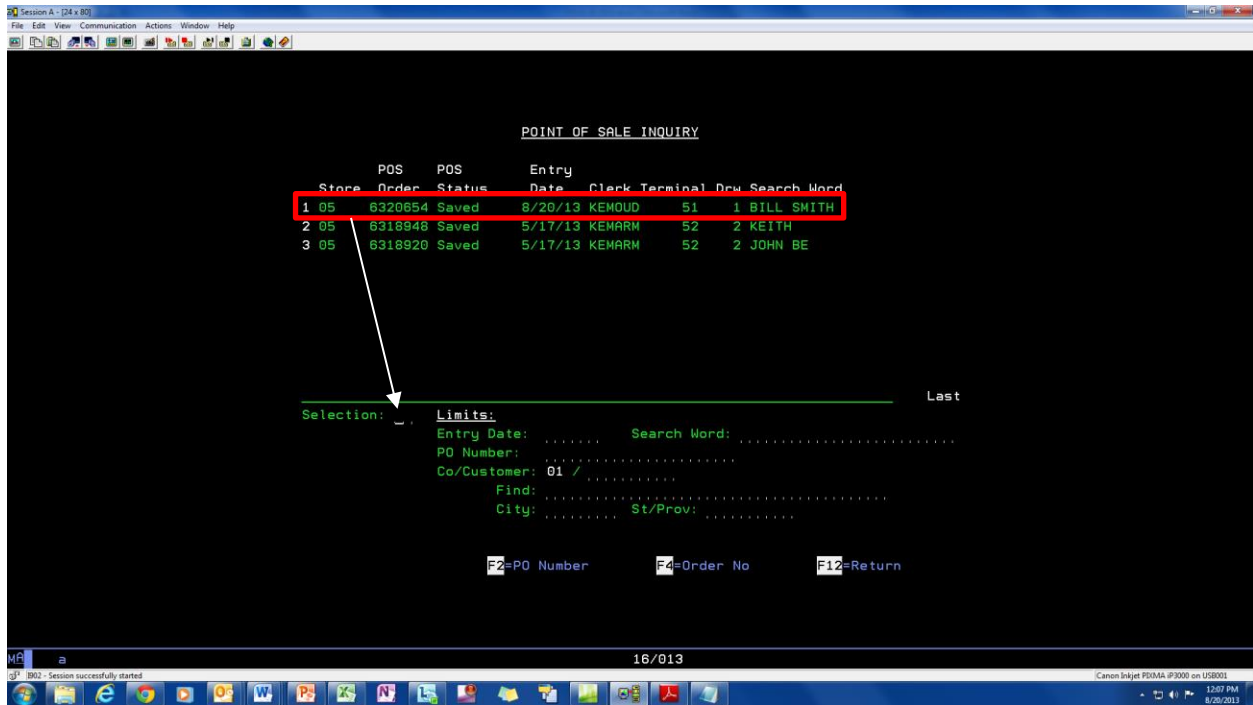
Important: Be sure to specify the type of saved transaction that you want to recall. For example, if you want to recall a saved return, key R in the Function field.



From the Enter Order/Enter Return Screen, press F6



Press F16 to display a list of all of the saved orders and returns for your store.



Locate the key word for your transaction and select it.

The transaction will display on the Enter Order/Enter Return Screen where you can continue processing the transaction.