iZen Point of Sale

User Guide

The information provided in this user guide is provisional and subject to change.

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Contents

iZen Point of Sale

This manual describes the setup and use of the iZen Point of Sale system.

Before processing any transactions, you must configure:

- The Point of Sale.

  See *Setting up the Point of Sale* on page 9.

- Any terminals that you want to connect to the Point of Sale.

  See *Setting up a terminal* on page 79.

You should familiarise yourself with how the Point of Sale is operated. See:

- *Basic terminal functions* on page 343.
- *Selling and refunding items* on page 409.
- *Tendering transactions* on page 465.

If your organisation uses the Portal loyalty scheme, you should also familiarise yourself with how to use loyalty cards with the Point of Sale. See *Managing loyalty cards* on page 511.

If you want to process customer payments and orders, see *Managing customer orders and laybys* on page 537.

If you want to use the specialised features of the Point of Sale such as appointments or table service, see:

- *Paying for external transactions* on page 605.
- *Waiting tables* on page 609

Configuring and operating the Point of Sale requires you to understand some of the concepts which are defined in the *Glossary* on page 649.

You can also find information via the *Index* on page 663.

Setting up the Point of Sale

Before you can use the Point of Sale, it needs to be configured to reflect the needs of your organisation.

> **Note:** Any changes made to the Point of Sale configuration do not take effect until the changes have been saved. Saving changes to the Point of Sale configuration always requires a supervisor's authorisation. See *Providing supervisor authorisation* on page 353.

Key concepts

Please see the *Glossary* on page 649 for information relating to the following terms:

Appointment
Base station
Gift voucher
One-shot button
One-shot button page
Operator
Point of Sale
Scheduler
Supervisor
Table
Terminal
Terminal group

What you can do:

The following topics explain tasks relating to setting up your Point of Sale:

- *Initial Point of Sale setup* on page 11.
- *Creating a terminal group on the Point of Sale* on page 13.
- *Setting the language and currency on the Point of Sale* on page 16.
- *Setting the security and permissions on the Point of Sale* on page 19.
- *Setting up gift vouchers on the Point of Sale* on page 22.
- *Setting up customer orders* on page 23.
- *Setting up laybys on the Point of Sale* on page 26.
- *Setting up table service on the Point of Sale* on page 29.
- *Configuring transaction types* on page 32.
- *Setting the service charges on the Point of Sale* on page 40.
- *Setting up emailed receipts* on page 38.
- *Setting up local vouchers* on page 35.
- *Setting up collection of customer information* on page 36.
- *Setting up external transaction payments on the Point of Sale* on page 43.
- *Setting up one-shot buttons* on page 101.
- *Setting up one-shot pages* on page 131.

Also see:

- *Terminal setup screen - Registration tab* on page 44.
- *Terminal setup screen - Security tab* on page 50.
- *Terminal setup screen - Customer orders tab* on page 63.
- *Terminal setup screen - Layby tab* on page 65
- *Terminal setup screen - One-shot buttons tab* on page 67.
- *Terminal setup screen - Miscellaneous tab* on page 72

The following topics explain tasks relating to setting up a terminal:

- *Connecting a terminal to a site* on page 81.
- *Configuring the terminal number* on page 84.
- *Moving a terminal to a new site* on page 85.
- *Connecting to a terminal group* on page 89.
- *Using the iPad scanner* on page 362.

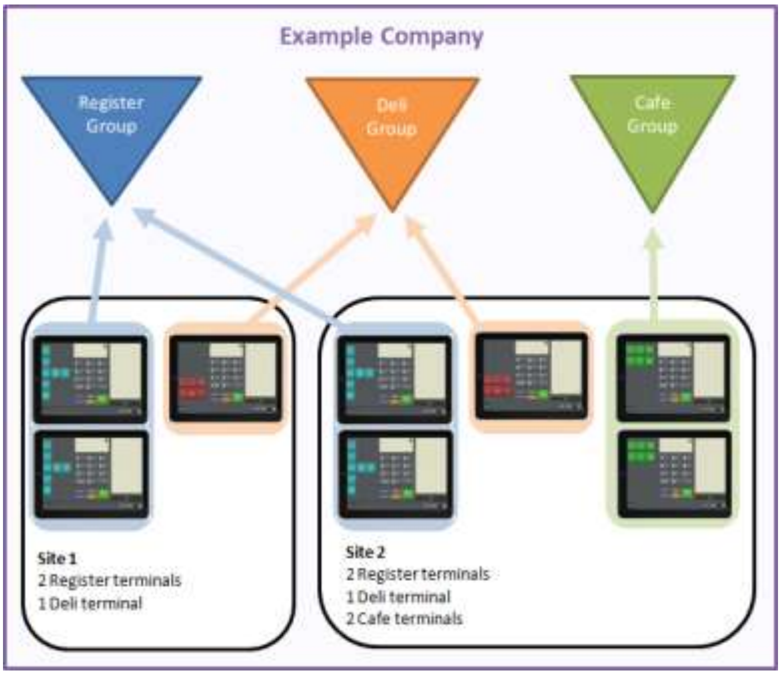
Also see *Setting up a terminal* on page 79.

Initial Point of Sale setup

Before you use the Point of Sale, you need to configure it to suit your organisation.

> **Note:** Any changes made to the Point of Sale configuration do not take effect until the changes have been saved. Saving changes to the Point of Sale configuration always requires a supervisor's authorisation. See *Providing supervisor authorisation* on page 353.

Point of Sale configurations are stored within terminal groups. Terminal groups are shared across all sites within a company. You can create as many terminal groups as you need to handle different configurations required by your company.



> ⚠ **Important Note:** Terminal groups are shared by all sites within a company, and any changes made to a group appear across all sites.

To configure the Point of Sale:

1. Connect a terminal to the Point of Sale.

   See *Connecting a terminal to a site* on page 81.

2. If you want to use more than one terminal configuration, for example to have some terminals set up for table service and some for regular sales, create terminal groups.

   See *Creating a terminal group on the Point of Sale* on page 13.

   > **Note:** Each terminal group you create must be configured separately.

3. Configure the language and currency for your site.

   See *Setting the language and currency on the Point of Sale* on page 16.

4. Configure the security settings for each terminal group, including:
   - which actions require a supervisor's authorisation
   - when the terminal automatically logs the operator out
   - whether multiple operators can be logged in at the same time
   - whether voids require a reason.

   See *Setting the security and permissions on the Point of Sale* on page 19.

5. Create any additional colour presets for one-shot buttons that you want.

   See *Creating one-shot button colour presets* on page 110.

6. Configure any service charges or service charge tax you want to apply.

   See *Setting the service charges on the Point of Sale* on page 40.

7. Configure one-shot buttons for any additional functions you want, such as:
   - Gift vouchers.

     See *Setting up gift vouchers on the Point of Sale* on page 22.

   - Appointments.

     See *Setting up external transaction payments on the Point of Sale* on page 43.

   - Table service.

     > **Note:** If you are using table service, take care when deciding the default transaction type for your terminal, as it affects all transactions on the terminal, not just transactions where you have selected a table. See *Setting up table service on the Point of Sale* on page 29.

     See *Setting up table service on the Point of Sale* on page 29.

   - Other one-shot buttons.

     See *Setting up one-shot buttons* on page 101.

8. Connect any other terminals you plan to use to the site.

   See *Connecting a terminal to a site* on page 81.

   The Point of Sale is ready to process transactions.

Creating a terminal group on the Point of Sale

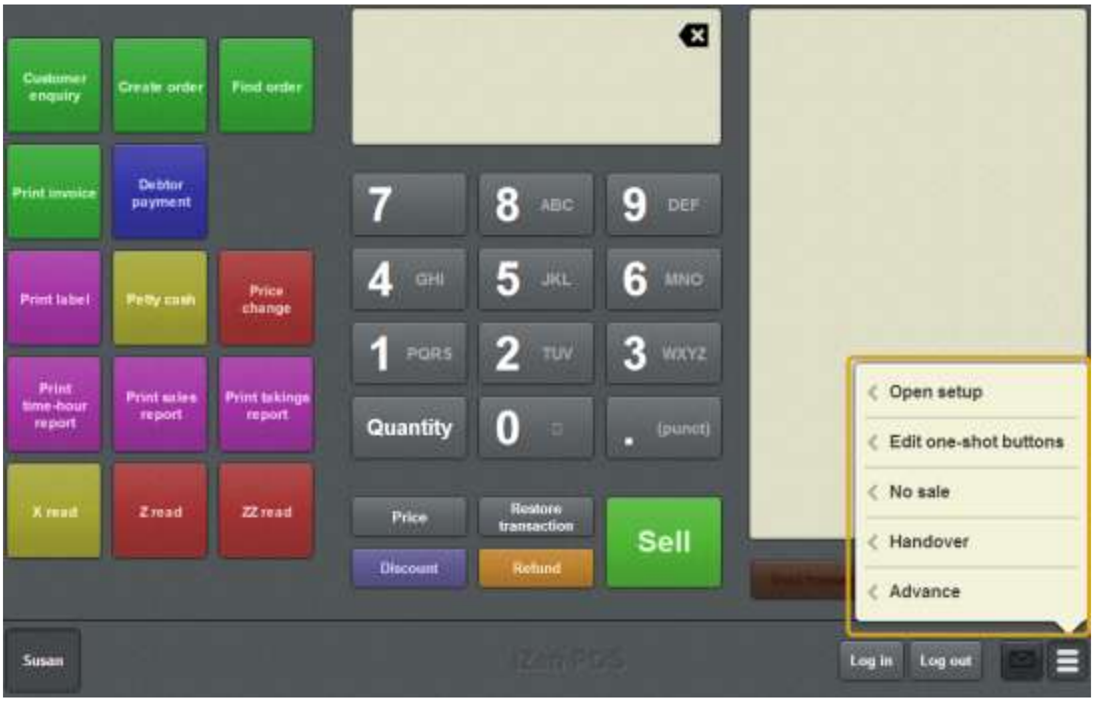
Create a terminal group when you want a set of terminals to share a configuration. For example, you may want some terminals to be set up for table service, and other terminals to be used for regular transactions.

> ⚠ **Important Note:** Terminal groups are shared by all sites within a company, and any changes made to a group appear across all sites.

To create a terminal group:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.



2. Press **Open setup**.

   The Terminal setup screen is displayed.

> **Note:** The Point of Sale displays the most recently-viewed tab in the Terminal setup screen.

3. Press **Registration**.

   The Registration tab is displayed.

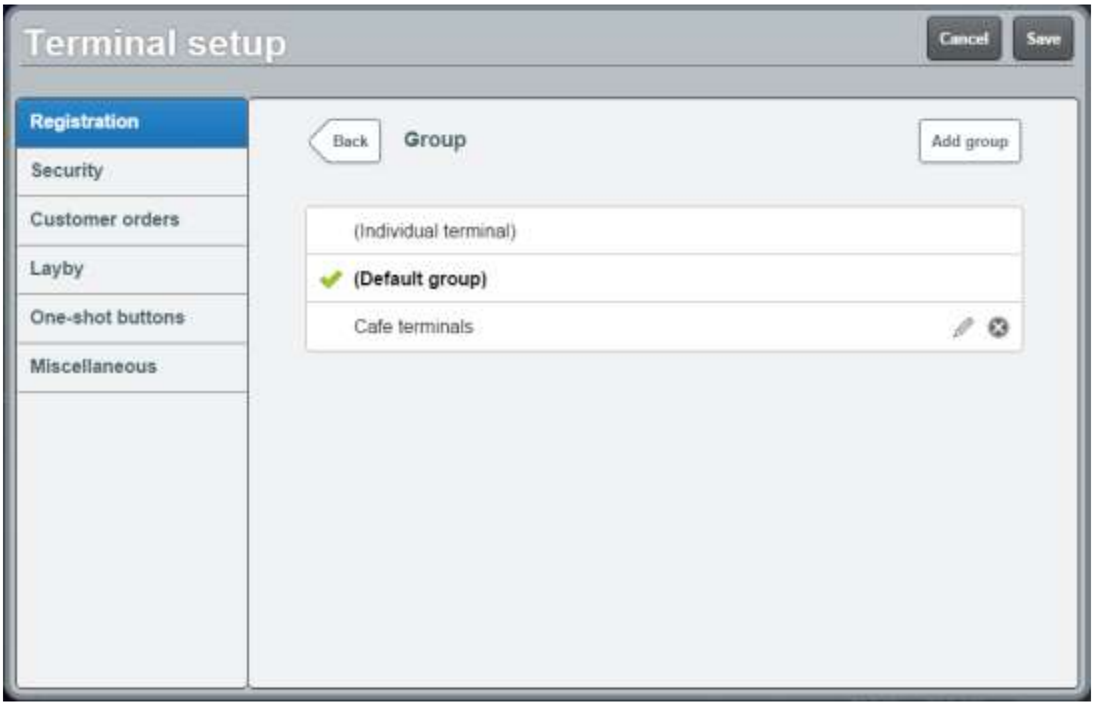
Site Chadstone
Group (Default group)
Terminal 5
Scale None

Localisation
Language English
Currency Australian Dollar

About
Version iZen POS v1.2.29
Build c1de7fe

4. Press **Group**.

   The available groups are displayed.



(Individual terminal)
✓ (Default group)
Cafe terminals

5. Press Add group.

   The new group is added to the Point of Sale.

6. Type the group name.

7. Press Save.

   The Supervisor authorisation screen is displayed.

Please authorise the following action:
Save changes to setup

8. Type in your supervisor operator code and password.
9. Click Authorise.

   The changes are saved.

Setting the language and currency on the Point of Sale

Set the language and currency you want the Point of Sale to operate in.

> **Important Note:** This only affects how currency is displayed in the Point of Sale. It does not automatically convert currency amounts.

To select your language or currency:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

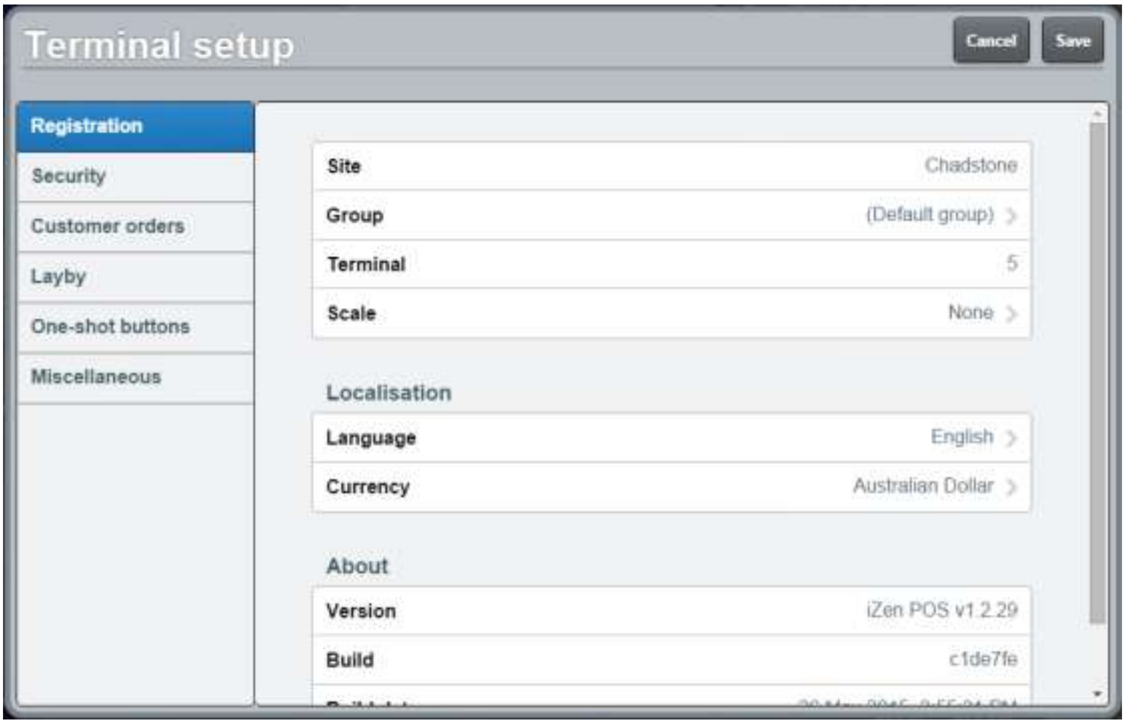
2. Press **Open setup**.

   The Terminal setup screen is displayed.

> **Note:** The Point of Sale displays the most recently-viewed tab in the Terminal setup screen.

3. Press **Registration**.

   The Registration tab is displayed.



Site: Chadstone
Group: (Default group)
Terminal: 5
Scale: None

Localisation
Language: English
Currency: Australian Dollar

About
Version: iZen POS v1.2.29
Build: c1de7fe

See *Terminal setup screen - Registration tab* on page 44.

4. Press **Language**.

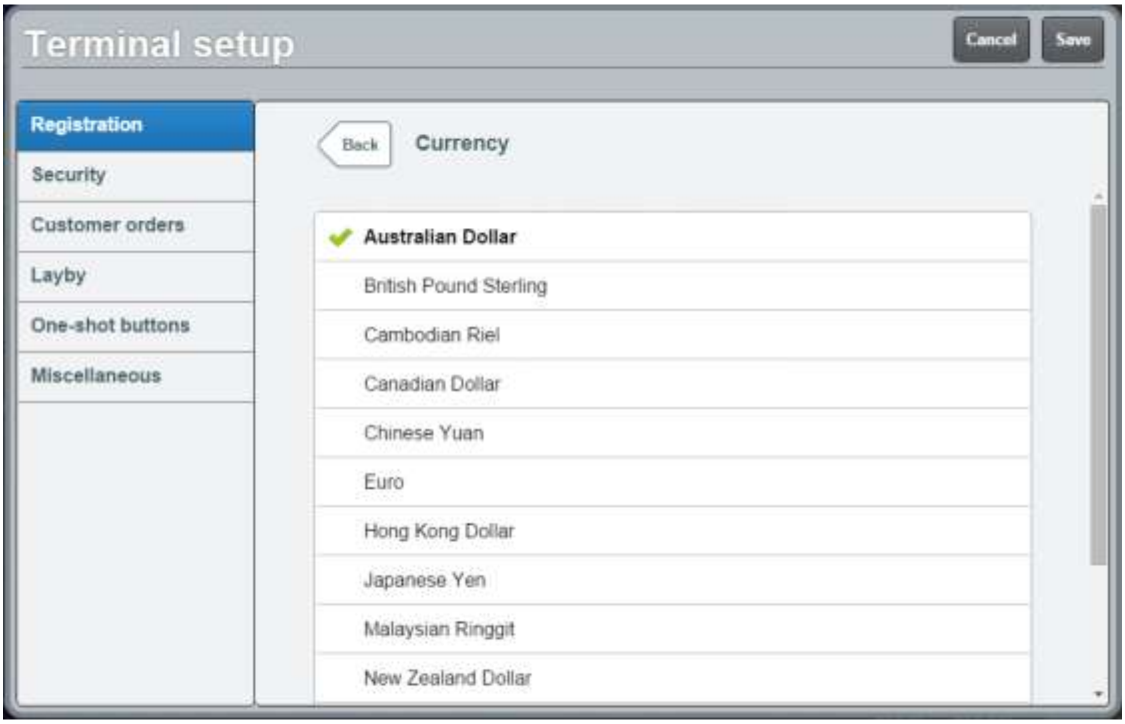
   The available language options are displayed.

5. Press the language you want to use on the Point of Sale.

> **The Point of Sale still shows the same language:** You must restart the Point of Sale for any language changes to take effect. Close the browser, and reopen again. If you are running the Point of Sale on an iPad, press the home button twice and remove the browser from the multi-tasking memory. Then open the browser and navigate back to the Point of Sale.

6. Press **Currency**.

   The available currency options are displayed.



✓ Australian Dollar
British Pound Sterling
Cambodian Riel
Canadian Dollar
Chinese Yuan
Euro
Hong Kong Dollar
Japanese Yen
Malaysian Ringgit
New Zealand Dollar

7. Press the currency you want to use on the Point of Sale.
8. Press **Save**.

   The Supervisor authorisation screen is displayed.

Please authorise the following action:
Save changes to setup

9. Type in your supervisor operator code and password.
10. Click **Authorise**.

    The changes are saved.

Setting the security and permissions on the Point of Sale

Configure the security and permissions on the Point of Sale to control what actions require supervisor authorisation in line with your organisation's policies.

To configure the Point of Sale security settings:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

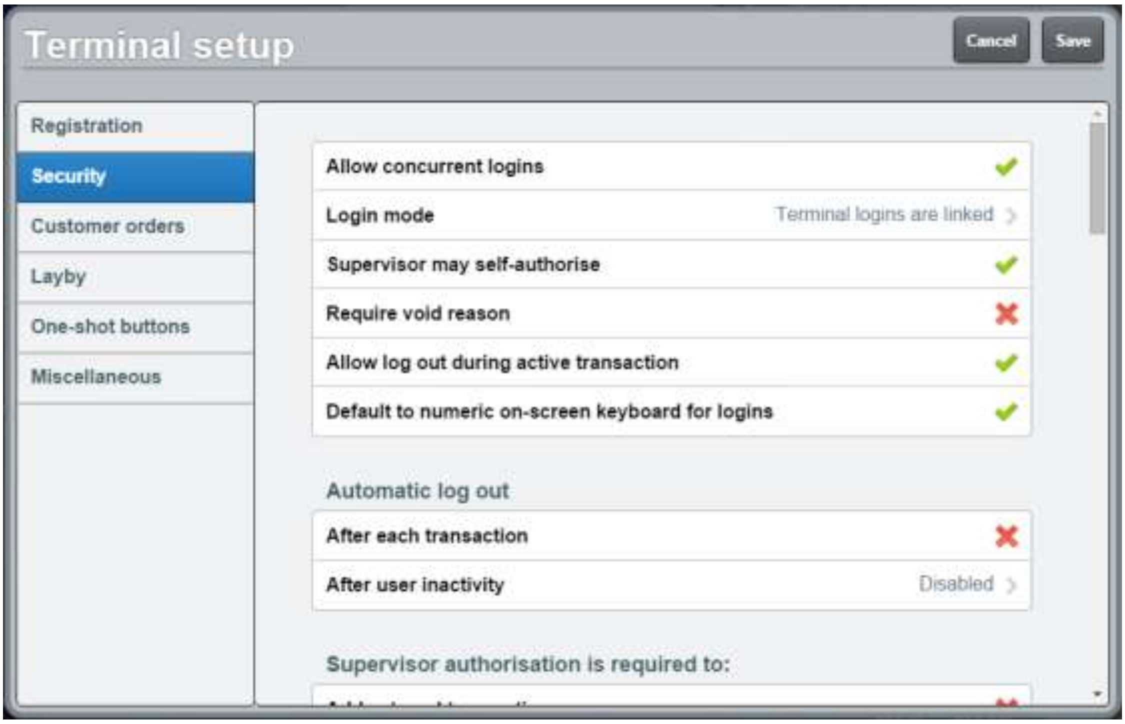
2. Press **Open setup**.

   The Terminal setup screen is displayed.

> **Note:** The Point of Sale displays the most recently-viewed tab in the Terminal setup screen.

3. Press **Security**.

   The Security tab is displayed.



Allow concurrent logins ✓
Login mode Terminal logins are linked ›
Supervisor may self-authorise ✓
Require void reason ✗
Allow log out during active transaction ✓
Default to numeric on-screen keyboard for logins ✓

Automatic log out
After each transaction ✗
After user inactivity Disabled ›

Supervisor authorisation is required to:

4. Configure:
   - The basic security settings such as how terminal logins should operate, and supervisor self-authorisation and void reasons.
   - Whether the Point of Sale should expect operator codes to be numbers only.

     Tip: Select this option if your site uses iPads and most operator codes and passwords are numeric. If this option is selected, the iPad displays the numeric on-screen keyboard for logins by default. The full keyboard can still be selected when logging in. If most operators have both letters and numbers in their operator code or password, do not select this option.

   - If and when the Point of Sale should automatically log out, or permit operators to log out.
   - Which actions require supervisor authorisations.

   See *Terminal setup screen - Security tab* on page 50.

5. Press Save.

   The Supervisor authorisation screen is displayed.

Please authorise the following action:
Save changes to setup

Site: Chadstone

6. Type in your supervisor operator code and password.
7. Click Authorise.

   The changes are saved.

Setting up gift vouchers on the Point of Sale

Gift vouchers must be configured on the Point of Sale using one-shot buttons. You can configure gift vouchers to:

- Specify set amounts which can't be altered during the transaction.
- Prompt the operator to type in an amount when creating the gift voucher.

Note: You can still redeem gift vouchers on the Point of Sale without a one-shot button. See *Tendering gift vouchers* on page 478.

To configure gift vouchers:

1. Decide whether you want to create:
   - several gift voucher buttons with set amounts
   - a single gift voucher button that prompts the operator for the amount
   - a combination of both gift voucher button types.
2. If you are creating multiple gift voucher buttons, make sure there is enough room on the Transaction screen or one-shot button page for all the buttons.

   Note: You cannot move a button to a different button page once it has been created. You have to delete the button and create another one where you want the button to go. Check that all the buttons you want will fit before you start creating them.
3. If you want to put the gift voucher buttons on a one-shot button page, create the one-shot button page and its button. See *Setting up one-shot pages* on page 131
4. Create the gift voucher buttons where you want them to be displayed. See *Creating a one-shot button to sell gift vouchers* on page 224.

The Point of Sale is ready to create and sell gift vouchers.

Setting up customer orders

Set the minimum deposit and default delivery fee for customer orders.

To set up customer orders:

1. From the Transaction screen, press .

   The Point of Sale menu is displayed.

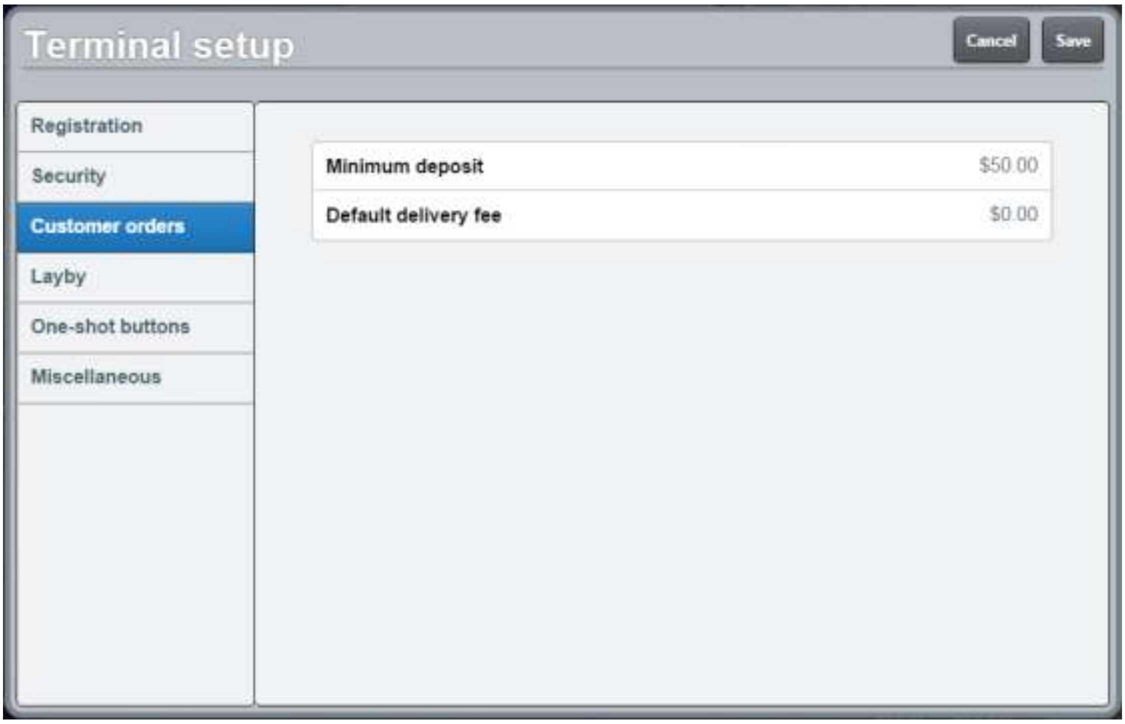
2. Press **Open setup**.

   The Terminal setup screen is displayed.

> **Note:** The Point of Sale displays the most recently-viewed tab in the Terminal setup screen.

3. Press **Customer orders**.

   The Customer orders tab is displayed.



Minimum deposit $50.00
Default delivery fee $0.00

See *Terminal setup screen - Customer orders tab* on page 63.

4. Type the minimum deposit for customer orders in the **Minimum deposit** field.

> **Note:** This minimum applies to all customer orders as a flat fee, not a percentage. Operators cannot set an order deposit to be below this amount. If your organisation requires a percentage of the order total as a minimum deposit, this needs to be calculated when each order is created.

5. Type the default amount to be charged for delivery in the **Default delivery fee** field.

> **Note:** Operators can change the delivery field to zero when creating an order.

6. Press Save.

   The Supervisor authorisation screen is displayed.

Please authorise the following action:
Save changes to setup

7. Type in your supervisor operator code and password.
8. Click Authorise.

   The changes are saved.

Setting up laybys on the Point of Sale

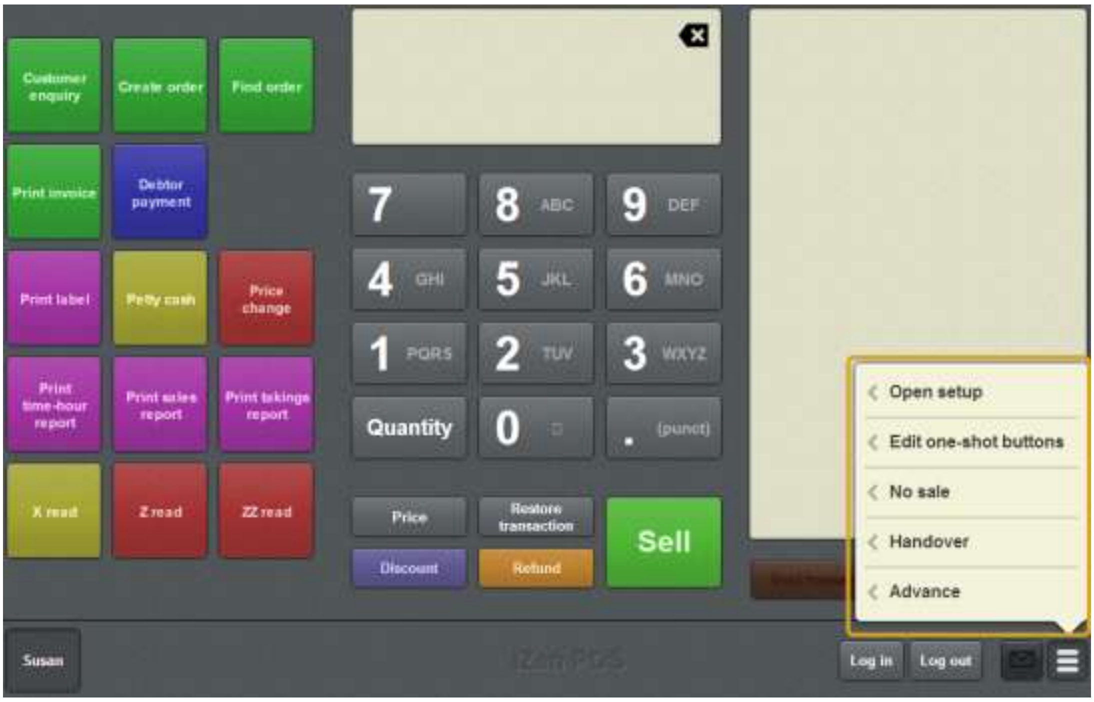
If you want to offer laybys to your customers, you can configure the default settings.

> **Note:** These settings are just defaults. The deposit, layby fee and layby period can be edited for each layby created.

To configure laybys:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.



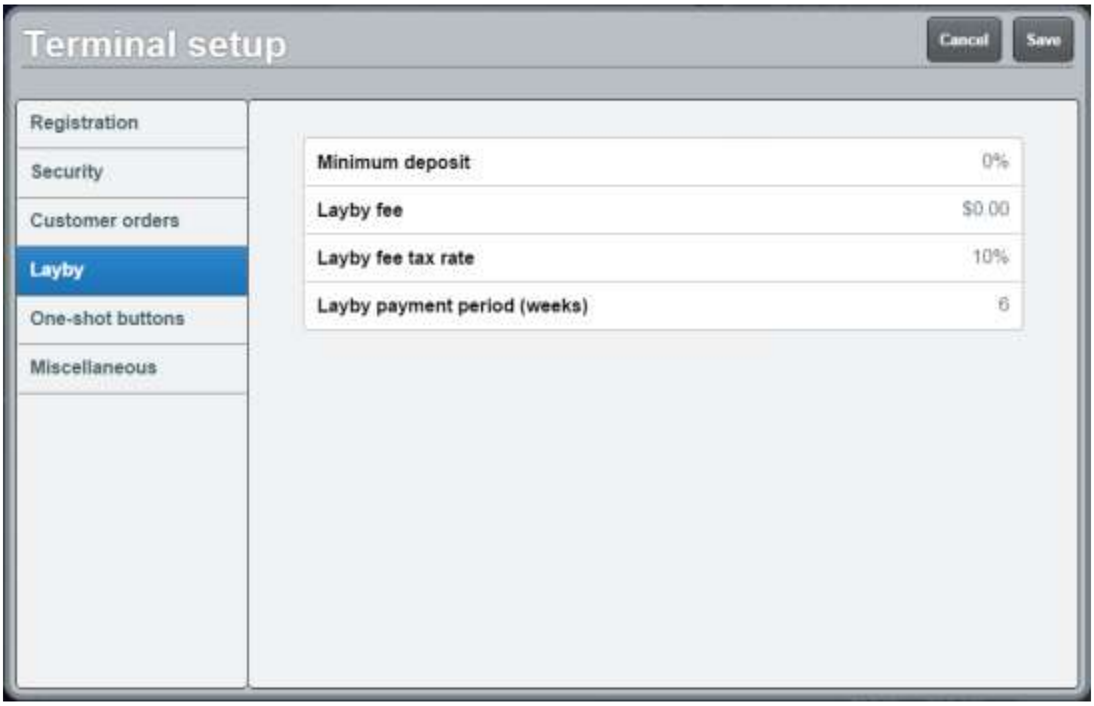
2. Press **Open setup**.

   The Terminal setup screen is displayed.

   > **Note:** The Point of Sale displays the most recently-viewed tab in the Terminal setup screen.

3. Press **Layby**.

   The Layby tab is displayed.



Minimum deposit 0%

Layby fee $0.00

Layby fee tax rate 10%

Layby payment period (weeks) 6

4. Press **Minimum deposit**.
5. Type the percentage of the transaction you want to use as a minimum deposit for laybys.

   For example, if you want all laybys to have a minimum deposit of ten percent, type **10**.

6. Press **Layby fee**.
7. Type the dollar amount you want to add for a default layby fee. This non-tax inclusive, and is added on top of the deposit.

   For example, if you want to charge $2 for each layby created, type **2**.

8. Press **Layby fee tax rate**.
9. Type the tax rate percentage to charge on the layby fee.
10. Press **Layby payment period (weeks)**.
11. Type the number of weeks a customer has to pay a layby.
12. Press Save.

    The Supervisor authorisation screen is displayed.

Please authorise the following action:
Save changes to setup

Site: Chadstone

13. Type in your supervisor operator code and password.

14. Click **Authorise**.

    The changes are saved.

Setting up table service on the Point of Sale

Before you can use the Point of Sale to record table orders, you need to configure table service.

To configure table service:

1. Make sure you have tables configured on the Portal.
2. If you want to also have terminals that are not configured for table service, create a table service terminal group and set the terminal to that group.

   See *Creating a terminal group on the Point of Sale* on page 13 and *Connecting to a terminal group* on page 89.

3. Configure any service charges or service charge tax you want to apply to transactions in that terminal group.

   See *Setting the service charges on the Point of Sale* on page 40.

4. Select the **Enable table service** field in the Miscellaneous tab of the Terminal setup screen.

   See *Terminal setup screen - Miscellaneous tab* on page 72.

5. Configure your transaction order types in the Miscellaneous tab of the Terminal setup screen:

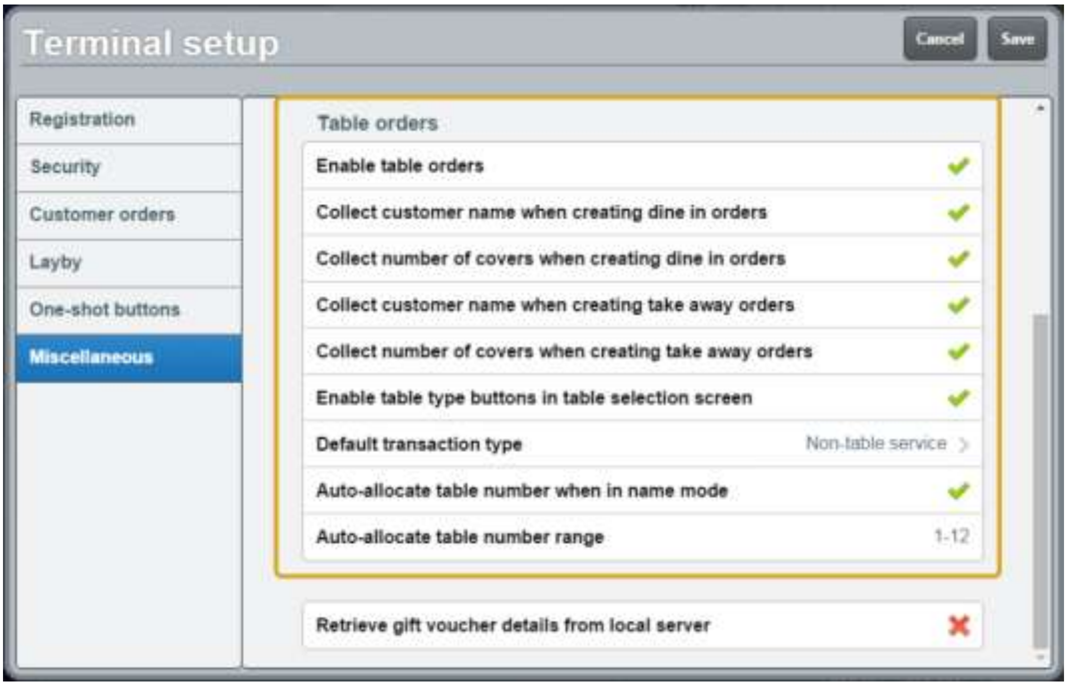


Table orders

Enable table orders ✓
Collect customer name when creating dine in orders ✓
Collect number of covers when creating dine in orders ✓
Collect customer name when creating take away orders ✓
Collect number of covers when creating take away orders ✓
Enable table type buttons in table selection screen ✓
Default transaction type Non-table service >
Auto-allocate table number when in name mode ✓
Auto-allocate table number range 1-12

Retrieve gift voucher details from local server ✗

2. Select the transaction type you will most commonly use in the **Default transaction type** field.

   The Point of Sale uses this type for each transaction unless another type is selected via the Select table buttons, or one-shot buttons.

> **Note:** This affects all transactions, not just transactions where a table has been selected.

See *Configuring transaction types* on page 32.

3. If you want to record the customer name for dine in or take away orders, enable the **Collect customer name** fields for the transaction type in the Miscellaneous tab of the Terminal setup screen.

   See *Terminal setup screen - Miscellaneous tab* on page 72.

4. If you want to record the number of people at the table (covers) for dine in or take away orders, enable the **Collect number of covers** fields .
5. If you are collecting customer names and want to automatically assign tables to table orders rather than selecting specific tables, enable the **Auto-allocate table number when in name mode** field.

   > **Note:** Tables can still be moved and selected when automatically allocated.

6. Select the table number range the Point of Sale should use for automatically-allocated tables in the **Auto-allocate table number range** field.

   > **Note:** Table numbers are configured when creating tables in the Portal. You may need to refer to the Portal table reports to see what table numbers your site uses. Make sure the range of table numbers you select gives the Point of Sale a reasonable number of tables to choose from. For example, **1-12** allows the Point of Sale to automatically allocate to tables numbered 1 through 12. If the Point of Sale can't find a table in this range, it prompts the operator to select a table.

6. Choose whether you want to select your tables via a table layout, a list of tables, or either method:

> **Note:** You can configure your Point of Sale to use both a table layout and list at the same time.

To select your tables from a table layout:

1. If you want to set up your tables in a one-shot button page, create the table page.

   See *Setting up one-shot pages* on page 131.

2. Create the one-shot buttons to represent your table layout.

   See *Creating a one-shot button to retrieve a table* on page 257.

3. If you are using multiple transaction types for example dine in and take away, create the one-shot buttons to select the transaction type.

See *Creating a one-shot button to set a transaction type* on page 291.

To select your tables from a table list:

1. Create the one-shot button to open the table list.

   See *Creating a one-shot button to select a free or active table* on page 286.

2. If you are using transaction types, for example dine in and take away, configure the transaction type selection on the Select table screen by enabling the **Enable transaction type buttons** field in the Miscellaneous tab of the Terminal setup screen.

The Point of Sale is now configured for table service.

Configuring transaction types

Transaction types allow you to have different configurations for table service in your Point of Sale. For example, you may want to record the customer name for take away orders, but not dine in customers. The Point of Sale offers three transaction types:

- Non-table service, used for register transactions that do not send items to the kitchen.
- Take away service, used for table-service transactions.
- Dine in service, used for table-service transactions.

Note: Take away and dine in transaction types function exactly the same, and are provided to allow you two different configurations for table service.

The Point of Sale can select any of these transaction types at any time until the transaction is sent to the kitchen, even if the terminal belongs to a group configured not to use table service.

Configuring the default transaction type

You can configure multiple transaction types if you want to use both register transactions and table service transactions from the same terminal.

Note: The default transaction type applies to all transactions, even if a table is not selected.

To configure the default transaction type:

1. Open the Miscellaneous tab of the Terminal setup screen.

   See *Terminal setup screen - Miscellaneous tab* on page 72.

2. Scroll down to the Table orders section.

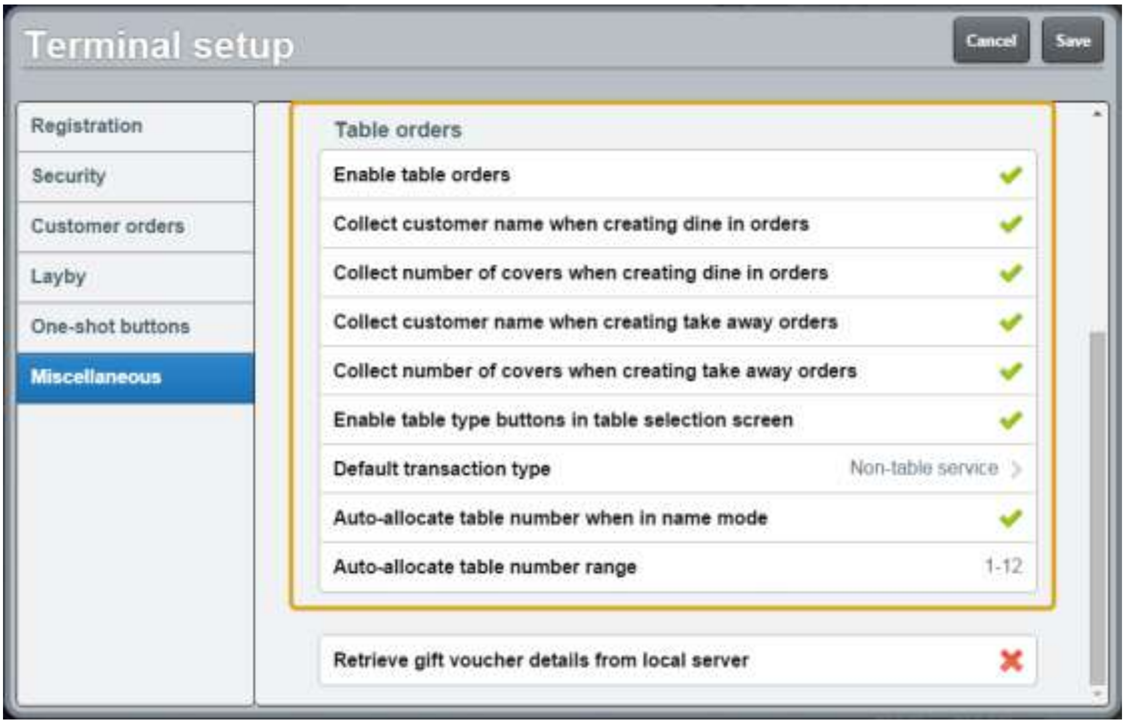


Table orders

Enable table orders	✓
Collect customer name when creating dine in orders	✓
Collect number of covers when creating dine in orders	✓
Collect customer name when creating take away orders	✓
Collect number of covers when creating take away orders	✓
Enable table type buttons in table selection screen	✓
Default transaction type	Non-table service
Auto-allocate table number when in name mode	✓
Auto-allocate table number range	1-12

Retrieve gift voucher details from local server	✗

3. If you want to use only non-table service transactions, disable the **Enable table orders** field.
4. If you want to use only one kind of table service transaction, disable the **Enable table type buttons in table selection screen** field.

> **Note:** This removes the ability to select dine in or take away from the Select table screen.

5. Select the transaction type you use most often in the **Default transaction type** field.

> **Note:** You can still select other transaction types using one-shot buttons.

6. If you want to collect the customer names when taking table service orders, enable the **Collect customer name ...** field.
7. If you want to collect the number of people being served at a table when taking table service orders, enable the **Collect number of covers ...** field.

> **Note:** Collecting names and covers can be configured differently for dine in and take away orders.

8. If you want to automatically allocate tables instead of selecting a table for each order:
    1. Enable the **Collect customer name ...** field for the transaction type you want to automatically assign tables for.

    > **Note:** You must configure the Point of Sale to collect the customer's name in order to automatically allocate a table.

    2. Enable the **Auto-allocate table number when in name mode** field.
    3. Select the range of table numbers the Point of Sale should use for automatically allocated tables in the **Auto-allocate table number range** field.

    > **Note:** Table numbers are configured when creating tables in the Portal. You may need to refer to the Portal table reports to see what table numbers your site uses. Make sure the range of table numbers you select gives the Point of Sale a reasonable number of tables to choose from. For example, **1-12** allows the Point of Sale to automatically allocate to tables numbered 1 through 12. If the Point of Sale can't find a table in this range, it prompts the operator to select a table.

9. Press Save.

   The Point of Sale is configured to use a default transaction type.

Setting up local vouchers

You can configure the Point of Sale to use the local base station for managing vouchers rather than the Portal. This allows you to use vouchers without having to be connected to the Portal.

> **Note:** Configuring local vouchers does not prevent using Portal vouchers as long as the base station can communicate with the Portal.

To configure your Point of Sale to use local vouchers:

1. Open the Miscellaneous tab of the Terminal setup screen.

   See *Terminal setup screen - Miscellaneous tab* on page 72.

2. Scroll down to the **Retrieve gift voucher details from local server** field.

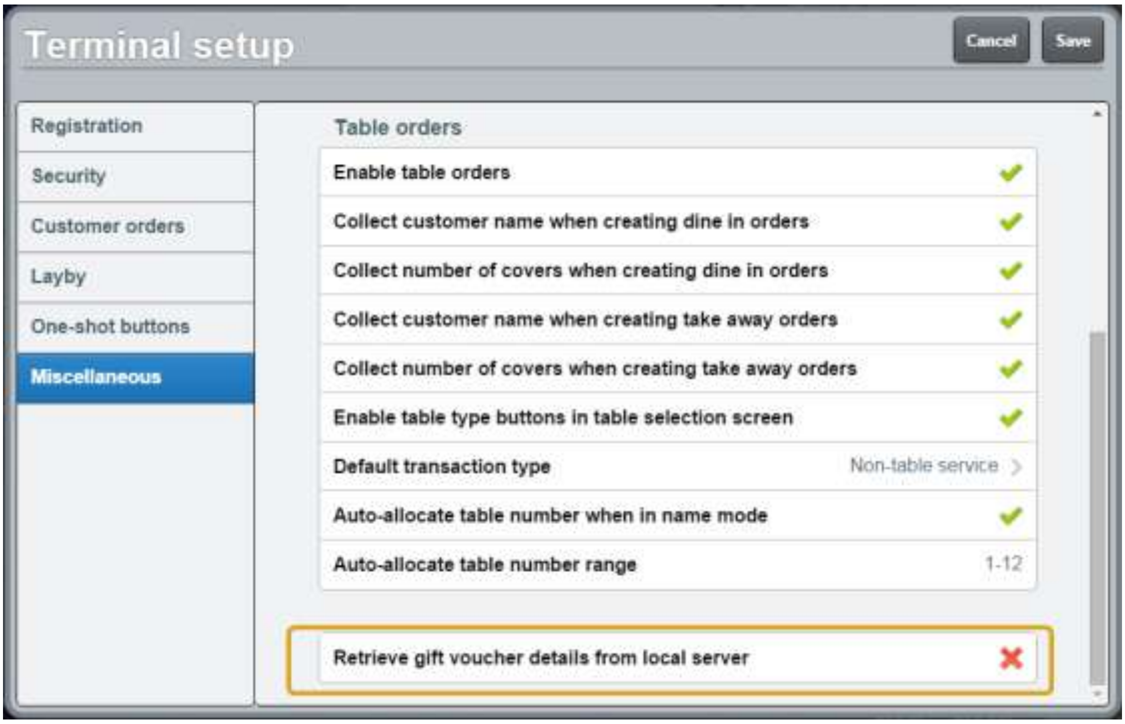


Table orders

Enable table orders	✓
Collect customer name when creating dine in orders	✓
Collect number of covers when creating dine in orders	✓
Collect customer name when creating take away orders	✓
Collect number of covers when creating take away orders	✓
Enable table type buttons in table selection screen	✓
Default transaction type	Non-table service
Auto-allocate table number when in name mode	✓
Auto-allocate table number range	1-12

Retrieve gift voucher details from local server	✗

3. Select the field.

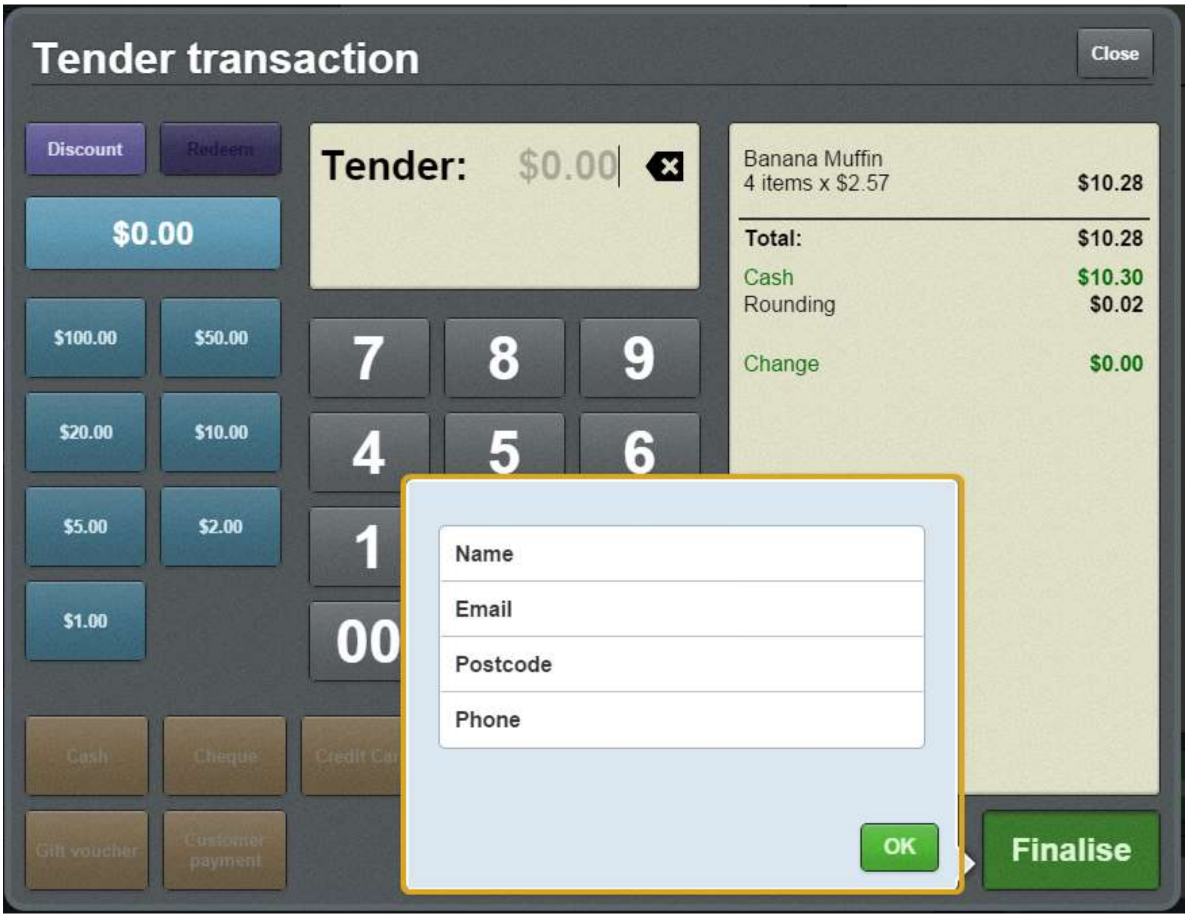
   The Point of Sale is configured to use local vouchers.

Setting up collection of customer information

You can configure the Point of Sale to collect customer information during the tender process. You can collect a customer's:

- Name.
- Email address.
- Post code.
- Phone number.

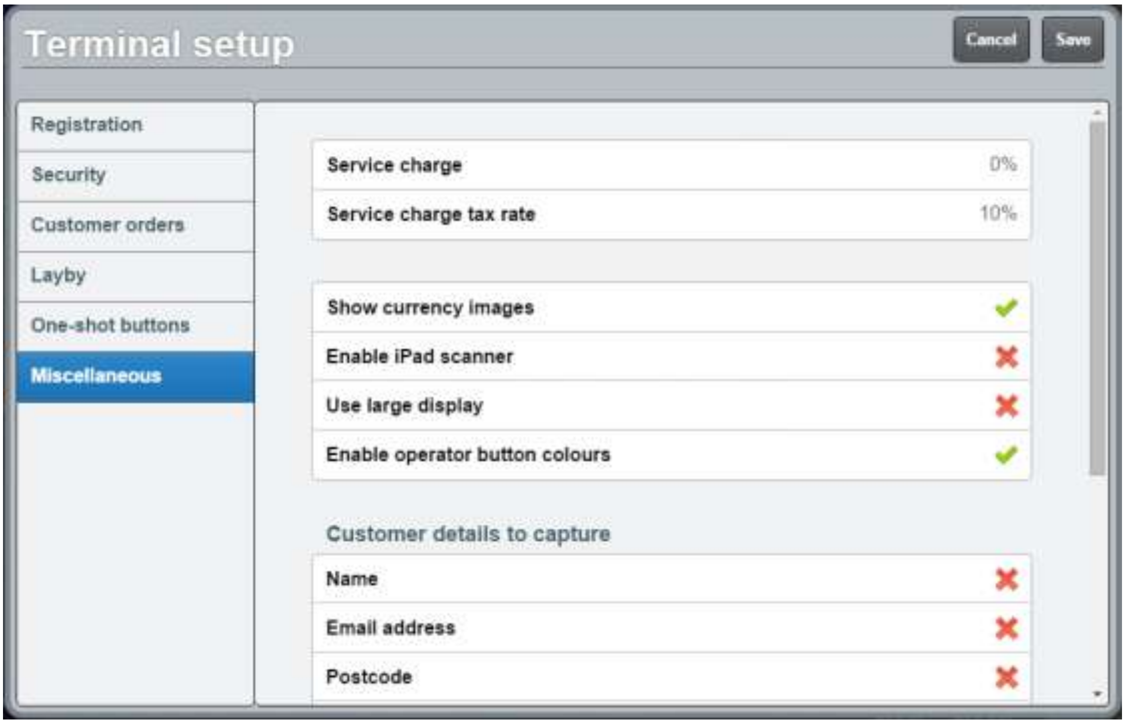
The Point of Sale prompts the operator to collect the information when they finalise the transaction.



Note: This information is automatically filled in if a loyalty member is signed in.

To configure the Point of Sale to collect customer information:

1. Open the Miscellaneous tab of the Terminal setup screen.



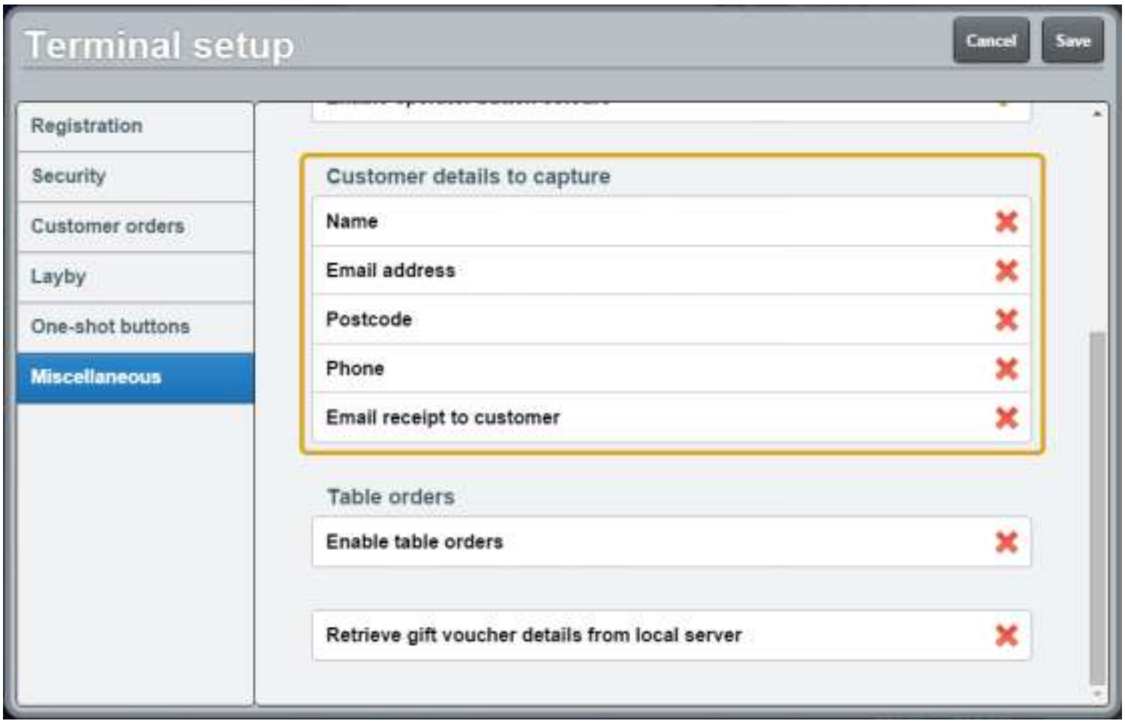
Service charge	0%
Service charge tax rate	10%
Show currency images	✓
Enable iPad scanner	✗
Use large display	✗
Enable operator button colours	✓

Customer details to capture

Name	✗
Email address	✗
Postcode	✗

See *Terminal setup screen - Miscellaneous tab* on page 72.

2. Scroll down to the Customer details to capture section.



Customer details to capture

Name	✗
Email address	✗
Postcode	✗
Phone	✗
Email receipt to customer	✗

Table orders

Enable table orders	✗
Retrieve gift voucher details from local server	✗

3. Select the customer details you want to capture.

4. Press Save.

The Point of Sale is configured to capture customer information.

Setting up emailed receipts

You can configure the Point of Sale to email a copy of the receipt to the customer in addition to the printed receipt. The Point of Sale always prints a copy of the receipt.

> **Note:** In order to receive emailed receipts, the customer must either be added to the transaction as a debtor or loyalty member, or record their email during the tendering. If the customer is not signed in and no email is specified, the receipt is not emailed.

See *Setting up collection of customer information* on page 36.

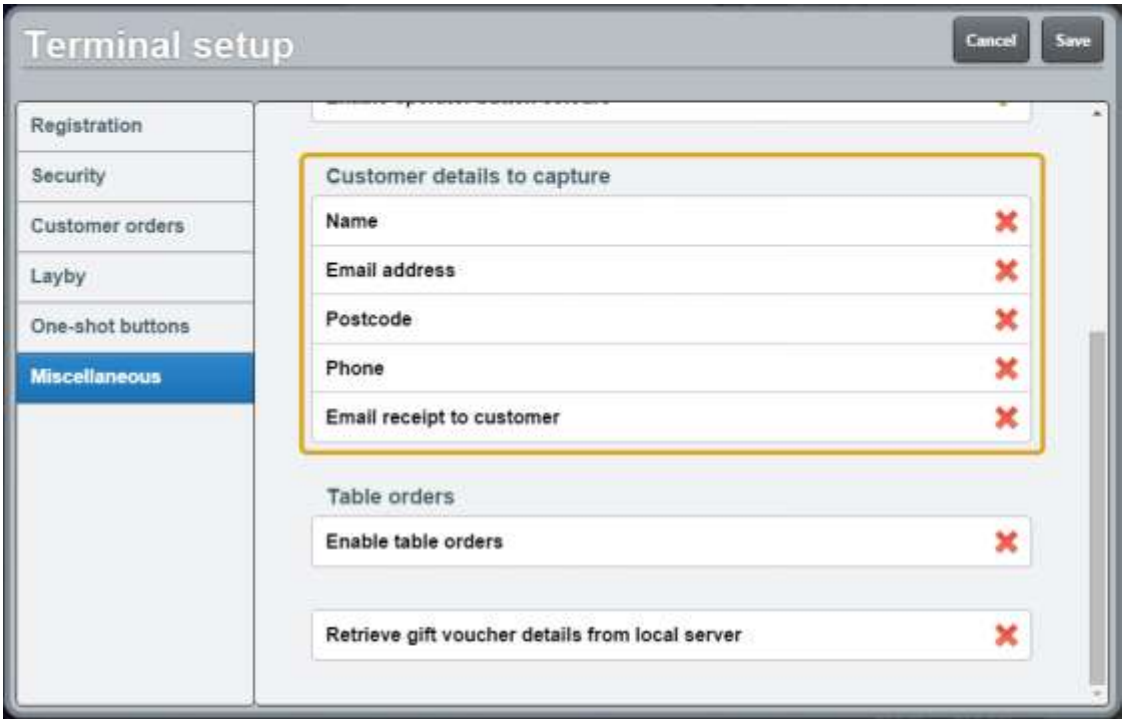
Also see *Adding a loyalty card* on page 444.

To configure the Point of Sale to email receipts:

1. Open the Miscellaneous tab of the Terminal setup screen.

   See *Terminal setup screen - Miscellaneous tab* on page 72.

2. Scroll down to the Customer details to capture section.



Customer details to capture

Name ✗

Email address ✗

Postcode ✗

Phone ✗

Email receipt to customer ✗

Table orders

Enable table orders ✗

Retrieve gift voucher details from local server ✗

3. Select the **Email address** field.
4. Select the **Email receipt to customer** field.

> **Note:** You can also include other fields, such as the customer's phone or post code. The customer is asked for these when they finalise the transaction. **Email address** and **Email receipt to customer** are the minimum fields required to email a receipt to a customer. Also see *Setting up collection of customer information* on page 36.

5. Press Save.

   The Point of Sale is configured to email a copy of the receipt to the customer.

Setting the service charges on the Point of Sale

If you want to add service charges to your transactions, you need to configure them in the Terminal setup screen.

> **Important Note:** The service charge you configure is used for all transactions completed on the terminal. If you want only some transactions to have a service charge, for example, a cafe section within a store, you must configure a separate terminal group to handle the service charge transactions. See *Creating a terminal group on the Point of Sale* on page 13.

To configure service charges:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

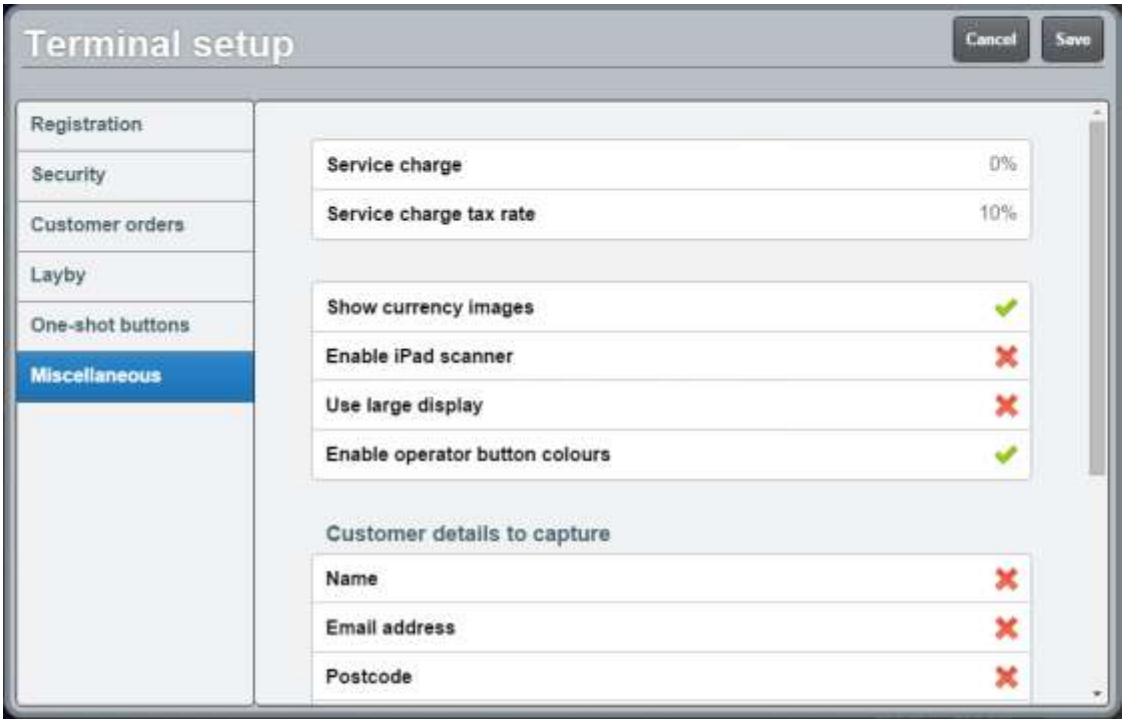
2. Press **Open setup**.

   The Terminal setup screen is displayed.

> **Note:** The Point of Sale displays the most recently-viewed tab in the Terminal setup screen.

3. Press **Miscellaneous**.

   The Miscellaneous tab is displayed.



Service charge 0%
Service charge tax rate 10%
Show currency images ✓
Enable iPad scanner ✗
Use large display ✗
Enable operator button colours ✓

Customer details to capture
Name ✗
Email address ✗
Postcode ✗

4. Press **Service charge (percent)**.
5. Type the percentage of the transaction you want to add as a service charge.

   For example, if you want to add ten percent on top of each transaction, type **10**.
6. Press **Service charge tax rate**.
7. Type the tax percentage to be added on top of service charges.

> **Note:** The percent is calculated from the service charge. For example, if the service charge is 10 and the tax rate is 20, a $24 transaction has a $2.40 service charge and $0.48 in tax added, for a total of $26.88.

8. Press Save.

   The Supervisor authorisation screen is displayed.

Please authorise the following action:
Save changes to setup

9. Type in your supervisor operator code and password.
10. Click Authorise.

    The changes are saved.

Setting up external transaction payments on the Point of Sale

If you want to process appointments or other external transactions through your Point of Sale, you need to configure it to retrieve external transactions from the Scheduler or Portal.

To configure the Point of Sale to process external transactions:

1. If you want to import appointments and the Scheduler is not already configured, ask AMC Convergent IT staff to configure the Scheduler on the base station.
2. Create a one-shot button to retrieve external transactions.

   See *Creating a one-shot button to retrieve an external transaction* on page 262.

   Also see *Paying for external transactions* on page 605.

Terminal setup screen - Registration tab

Use the Registration tab to:

- Configure the terminal group and terminal number.

  See *Configuring the terminal number* on page 84.

  Also see *Connecting to a terminal group* on page 89.

- Configure the terminal language and currency.

  See *Setting the language and currency on the Point of Sale* on page 16

> **Note:** Any changes made to the Point of Sale configuration do not take effect until the changes have been saved. Saving changes to the Point of Sale configuration always requires a supervisor's authorisation. See *Providing supervisor authorisation* on page 353.

Opening the Terminal setup screen - Registration tab

To open the Registration tab:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

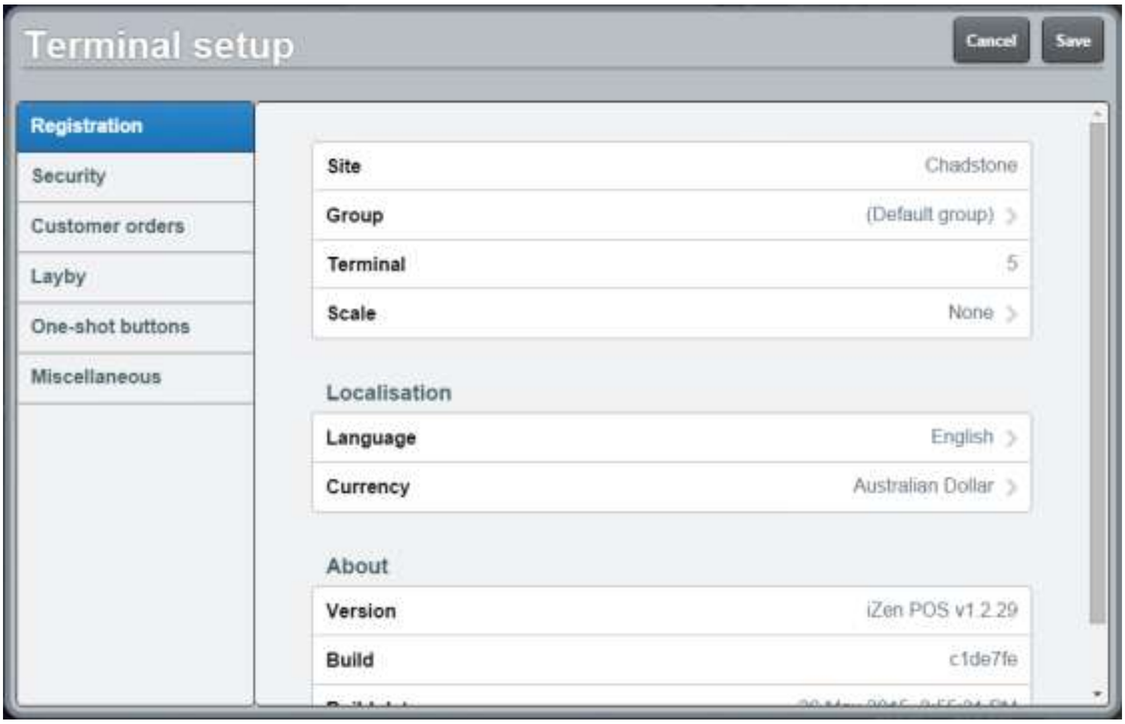
2. Press **Open setup**.

   The Terminal setup screen is displayed.

> **Note:** The Point of Sale displays the most recently-viewed tab in the Terminal setup screen.

3. Press **Registration**.

   The Registration tab is displayed.



Site Chadstone
Group (Default group)
Terminal 5
Scale None

Localisation

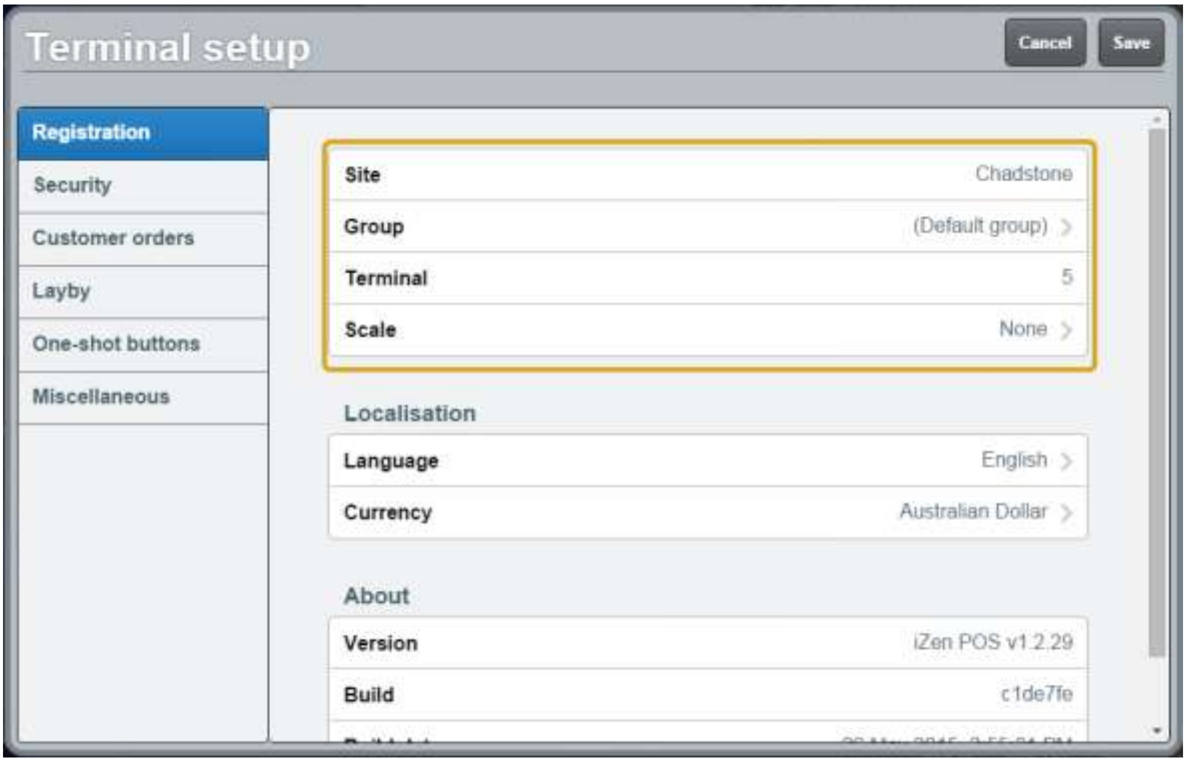
Language English
Currency Australian Dollar

About

Version iZen POS v1.2.29
Build c1de7fe

Terminal setup screen - Registration tab key fields and buttons

Registration area



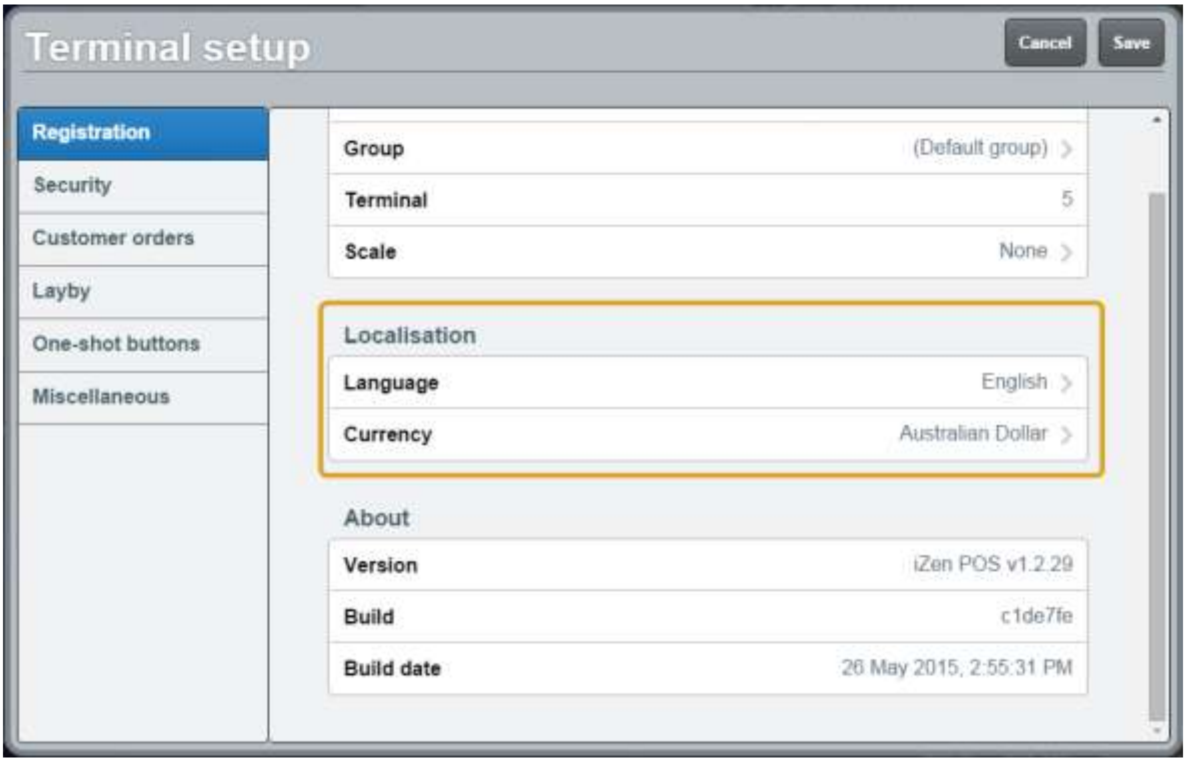
Site Chadstone
Group (Default group)
Terminal 5
Scale None
Language English
Currency Australian Dollar
Version iZen POS v1.2.29
Build c1de7fe

Use the Registration area to:

- view the site the terminal is connected to
- configure the terminal group and number.

Field	Description
Site	The site the terminal is connected to. **Note:** You cannot change the terminal site here. See *Moving a terminal to a new site* on page 85.
Group	Select the configuration group the terminal belongs to in the site. **Note:** You can create new groups for your site. See *Creating a terminal group on the Point of Sale* on page 13.
Terminal	The number that identifies this terminal in the site. **Note:** Each terminal must have a unique terminal number to correctly process transactions through the Portal. Do not change a terminal's number without direct instruction from AMC Convergent IT support.
Scale	The name of the scale the terminal is connected to via the base station.

Localisation area



Group (Default group)
Terminal 5
Scale None

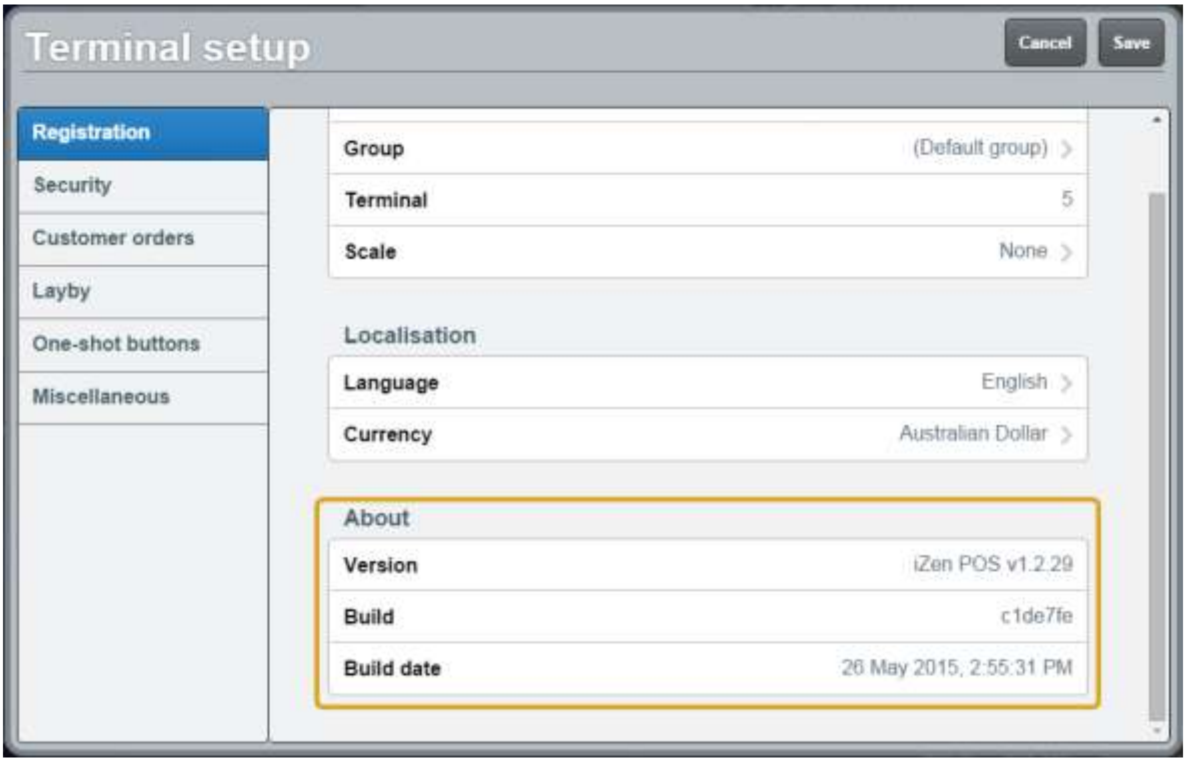
Language English
Currency Australian Dollar

Version iZen POS v1.2.29
Build c1de7fe
Build date 26 May 2015, 2:55:31 PM

Use the Localisation area to configure the language and currency that the Point of Sale uses.

Field	Description
Language	The language used by the Point of Sale.
Currency	The currency that the Point of Sale operates in. **Note:** Changing the currency only changes the currency symbol and the amounts or images displayed on the Quick amount buttons. It does not convert currency amounts.

About area



Group (Default group)
Terminal 5
Scale None

Localisation
Language English
Currency Australian Dollar

About
Version iZen POS v1.2.29
Build c1de7fe
Build date 26 May 2015, 2:55:31 PM

The About area displays details about the Point of Sale version and build.

Field	Description
Version	The version of iZen Point of Sale that is running.
Build	The specific release of iZen Point of Sale within the version.
Build date	The date this build was completed.
Compliance mode	The compliance mode the Point of Sale is configured to. **Note:** This field is only displayed if the Point of Sale is configured to a compliance mode. For example, see *Scales certification compliance mode* on page 644.

Terminal setup screen - Security tab

Use the Security tab to configure which Point of Sale actions require a supervisor's authorisation, or are not permitted at all.

See *Setting the security and permissions on the Point of Sale* on page 19.

> **Note:** Any changes made to the Point of Sale configuration do not take effect until the changes have been saved. Saving changes to the Point of Sale configuration always requires a supervisor's authorisation. See *Providing supervisor authorisation* on page 353.

Opening the Terminal setup screen - Security tab

To open the Security tab:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

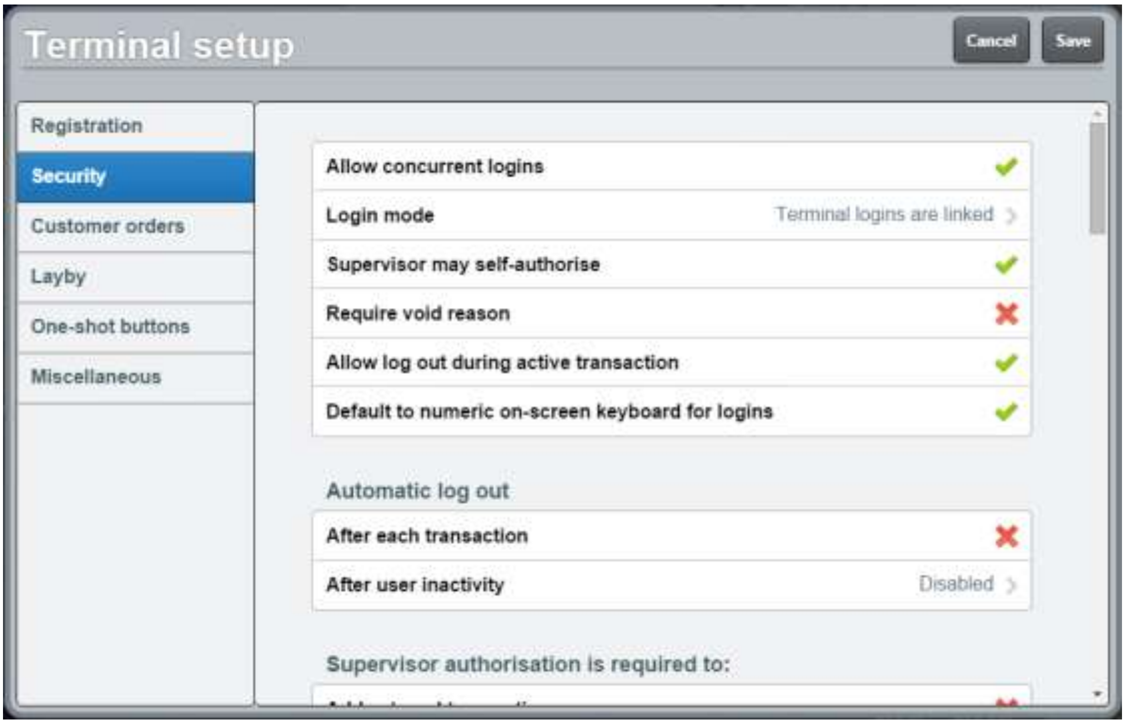
2. Press **Open setup**.

   The Terminal setup screen is displayed.

   > **Note:** The Point of Sale displays the most recently-viewed tab in the Terminal setup screen.

3. Press **Security**.

The Security tab is displayed.



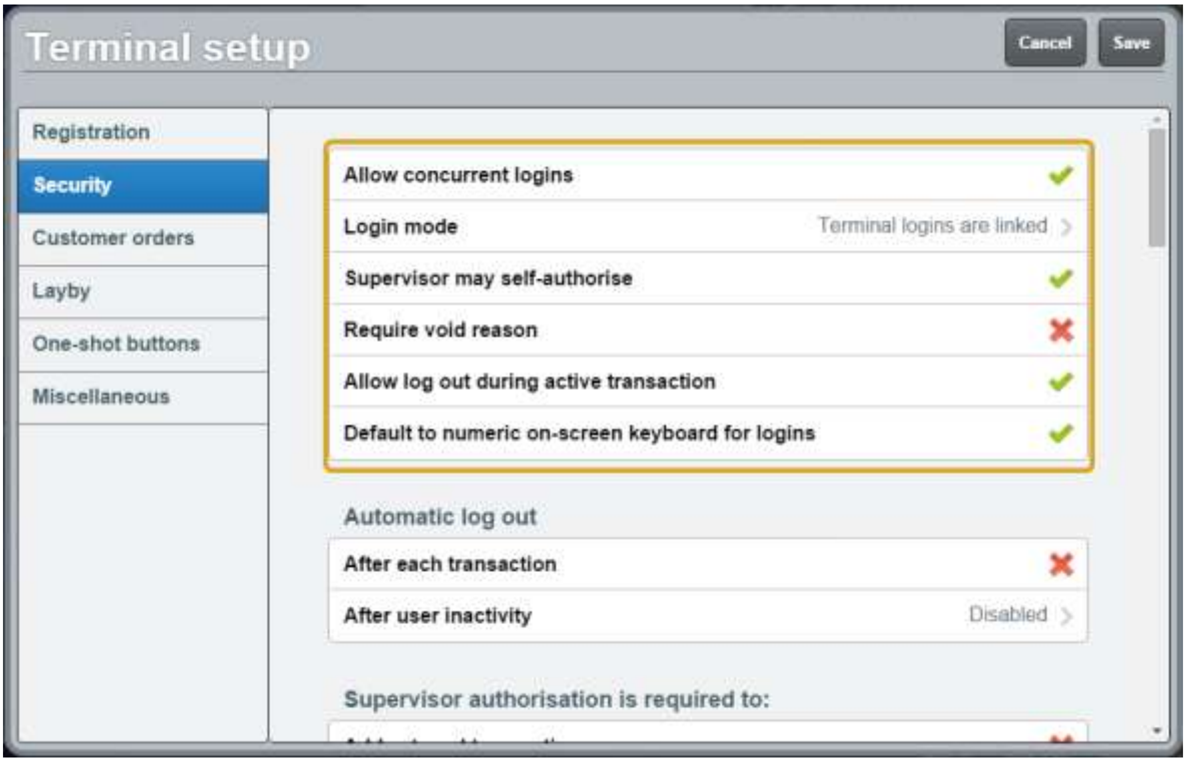
Allow concurrent logins ✓
Login mode Terminal logins are linked
Supervisor may self-authorise ✓
Require void reason ✗
Allow log out during active transaction ✓
Default to numeric on-screen keyboard for logins ✓

Automatic log out
After each transaction ✗
After user inactivity Disabled

Supervisor authorisation is required to:

Terminal setup screen - Security tab key fields and buttons

Permissions area



Allow concurrent logins	✓
Login mode	Terminal logins are linked ›
Supervisor may self-authorise	✓
Require void reason	✗
Allow log out during active transaction	✓
Default to numeric on-screen keyboard for logins	✓

Automatic log out

After each transaction	✗
After user inactivity	Disabled ›

Supervisor authorisation is required to:

Use the Permissions area to configure:

- Actions that are not permitted on the Point of Sale.
- How the terminal manages voids, authorisations and logins.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Allow concurrent logins</td><td>Select to allow more than one operator to be logged into the terminal at the same time.</td></tr>
<tr><td>Login mode</td><td>Select how the terminal log in should operate.

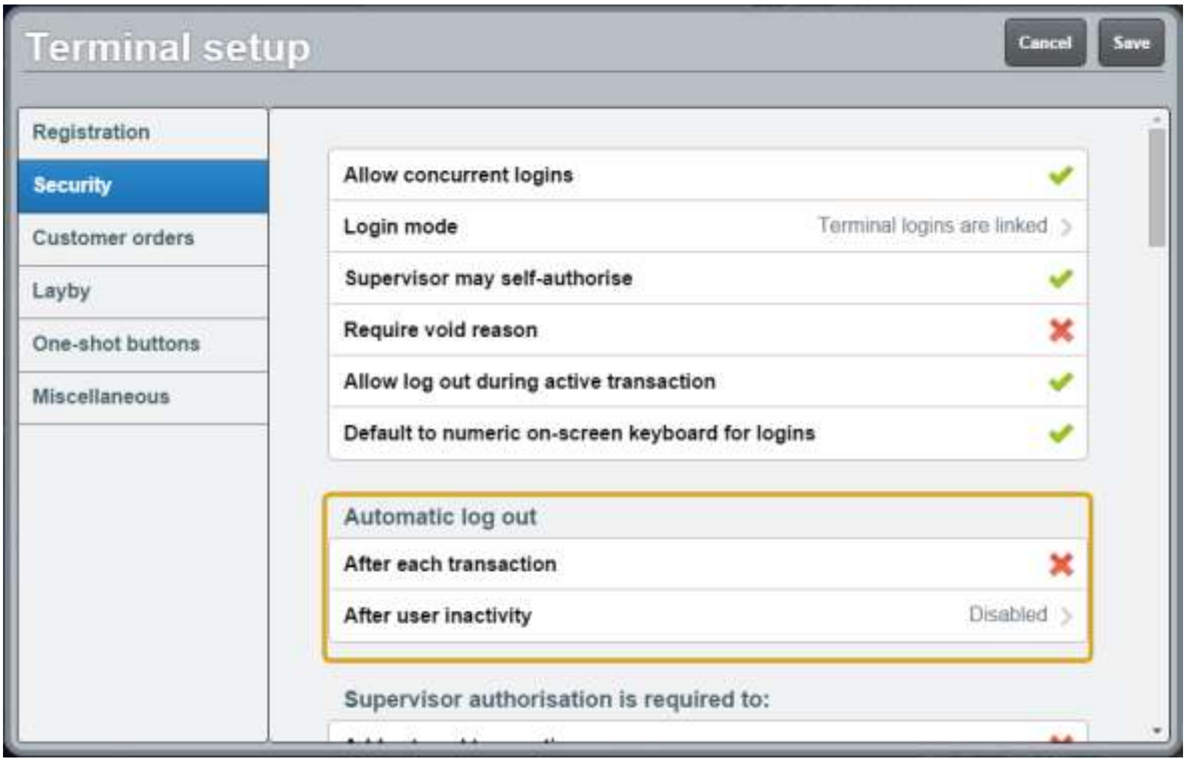
Note: These settings do not affect whether more than one operator can be logged into a terminal at once.
<table>
<tr><td>Single terminal per user</td><td>Operators can only be logged into one terminal at a time.

Note: If a terminal goes offline, the operator can log into another terminal to prevent operators being locked out.</td></tr>
<tr><td>Terminal logins are unlinked</td><td>Operators can log into multiple terminals at once. Each terminal must be logged into individually.</td></tr>
<tr><td>Terminal logins are linked</td><td>All terminals are logged in together when an operator logs in, and logged out when that operator logs out.</td></tr>
</table></td></tr>
<tr><td>Supervisor may self-authorise</td><td>Select to allow supervisors to use their own supervisor authorisation code to authorise actions.</td></tr>
<tr><td>Require void reason</td><td>Select to require operators to enter a reason for voiding transactions.</td></tr>
<tr><td>Allow log out during active transaction</td><td>Select to allow operators to log out when they have an unfinalised transaction that has not been parked.

Note: If this is enabled, open transactions are automatically restored when they next log in.</td></tr>
</table>

Field	Description
Default to numeric on-screen keyboard for logins	Select to use the numeric on-screen keyboard for iPad by default. Select this option if most of your operators only use numbers in the operator codes and passwords.

Automatic log out area



Allow concurrent logins ✓
Login mode: Terminal logins are linked
Supervisor may self-authorise ✓
Require void reason ✗
Allow log out during active transaction ✓
Default to numeric on-screen keyboard for logins ✓

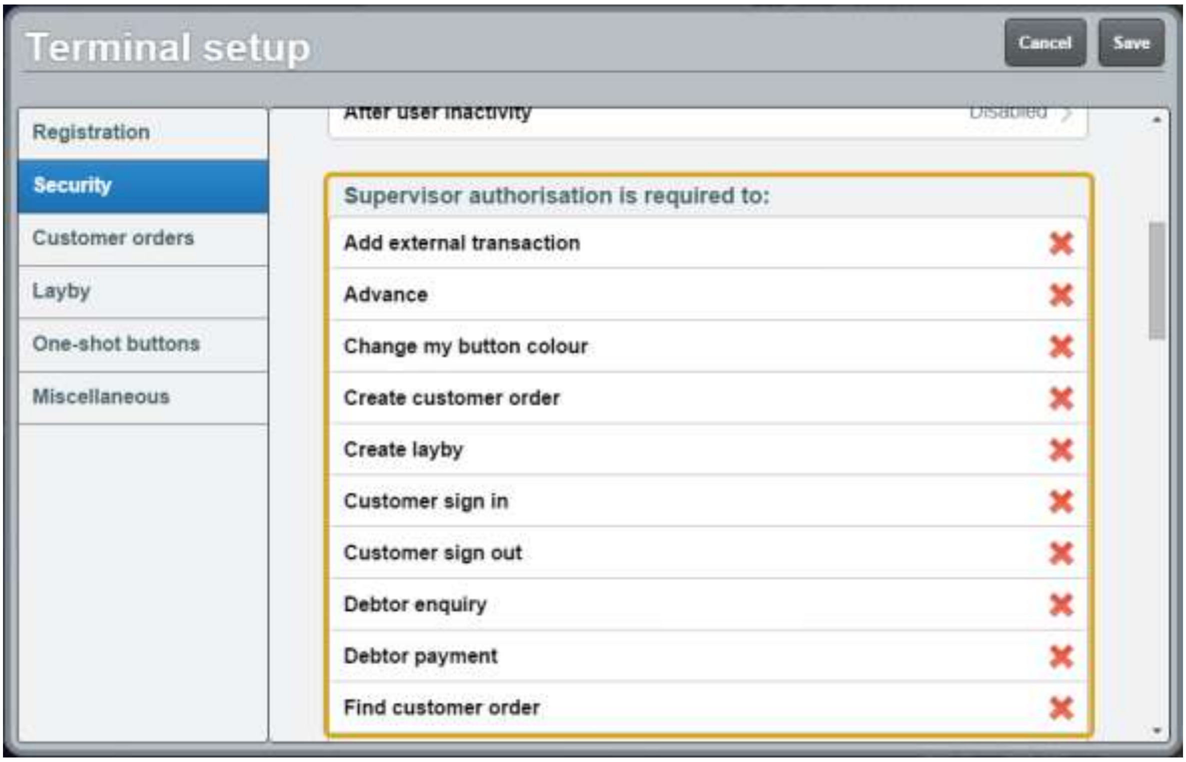
Automatic log out
After each transaction ✗
After user inactivity: Disabled

Supervisor authorisation is required to:

Use the Automatic log out area to configure if the Point of Sale automatically logs the operator out after certain events.

Field	Description
After each transaction	Select to set the Point of Sale to automatically log the operator out after each transaction.
After user inactivity	Select the period of time after which the Point of Sale automatically logs out any operator who has not used the terminal. A message is displayed indicating an operator has been logged out.

Supervisor's authorisation is required to area



After user inactivity Disabled

Supervisor authorisation is required to:

Add external transaction	✖
Advance	✖
Change my button colour	✖
Create customer order	✖
Create layby	✖
Customer sign in	✖
Customer sign out	✖
Debtor enquiry	✖
Debtor payment	✖
Find customer order	✖

Use the Supervisor's authorisation is required to area to select which actions prompt a supervisor's authorisation.

> **Note:** If the **Supervisor may self-authorise** field is disabled (✖), a supervisor requires the authorisation from another supervisor.

Field	Description
Add external transaction	Select to require a supervisor's authorisation to add an external transaction to the Transaction list. See *Retrieving external transactions* on page 606.
Advance	Select to require a supervisor's authorisation to record an advance in the terminal. See *Recording an advance* on page 355.
Change my button colour	Select to require a supervisor's authorisation to change the operator colour. See *Changing the operator colour* on page 351*Changing the operator colour* on page 351.
Create customer order	Select to require a supervisor's authorisation to create a customer order. See *Creating a customer order* on page 543.
Create layby	Select to require a supervisor's authorisation to create a layby. See *Creating a layby* on page 559.
Customer sign in	Select to require a supervisor's authorisation to sign a customer in. See *Signing customers in* on page 524.
Customer sign out	Select to require a supervisor's authorisation to sign e customer out. See *Signing customers out* on page 526.
Debtor enquiry	Select to require a supervisor's authorisation to perform a debtor enquiry. See *Performing a debtor enquiry* on page 587.
Debtor payment	Select to require a supervisor's authorisation to add a debtor payment to a transaction. See *Adding a debtor payment to a transaction* on page 593.
Find customer order	Select to require a supervisor's authorisation to open the customer order search and find a customer order. See *Finding an order* on

Field	Description
	page 547
Find layby	Select to require a supervisor's authorisation to find a layby. *Finding an layby* on page 563.
Find loyalty card	Select to require a supervisor's authorisation to find a loyalty card. See *Finding a loyalty card by name* on page 518.
Gift voucher	Select to require a supervisor's authorisation to add a gift voucher to a transaction. See *Creating gift vouchers* on page 421.
Handover	Select to require a supervisor's authorisation to record a handover in the terminal. See *Recording a handover* on page 357.
Modify item	Select to require a supervisor's authorisation to add options to an item. See *Adding options to items* on page 432.
No sale	Select to require a supervisor's authorisation to record a no-sale in the terminal. See *Recording a no-sale* on page 354.
Open one-shot button editor	Select to require a supervisor's authorisation to edit one-shot buttons. See *Setting up one-shot buttons* on page 101.
Open setup	Select to require a supervisor's authorisation to open the Terminal setup screen. **Note:** Saving changes to the settings always requires a supervisor's authorisation. You can use this setting to prevent operators from viewing the Terminal setup screen without authorisation.
Override price	Select to require a supervisor's authorisation to override an item's

Field	Description
	price. See *Overriding the price of an item* on page 441.
Pay customer order	Select to require a supervisor's authorisation to make a payment to a customer order. See *Adding a payment to a customer order* on page 550.
Pay layby	Select to require a supervisor's authorisation to make a payment to a layby. See *Paying a layby* on page 565.
Petty cash	Select to require a supervisor's authorisation to open the Petty cash screen. See *Recording petty cash expenses on the Point of Sale* on page 376.
Price change	Select to require a supervisor's authorisation to send a price change back to the Portal. See *Changing an item's price on the Portal* on page 359.
Print bill	Select to require a supervisor's authorisation to print the bill of the selected table. See *Printing a bill for a table* on page 629.
Print invoice	Select to require a supervisor's authorisation to print a customer invoice. See *Printing an invoice* on page 557.
Print label	Select to require a supervisor's authorisation to print a label. See *Printing a label for an item sold by unit* on page 364.
Print sales report	Select to require a supervisor's authorisation to print a sales report. See *Printing a sales report* on page 634.
Print takings	Select to require a supervisor's authorisation to print a takings

Field	Description
report	report. See *Printing a takings report* on page 636.
Print time-hour report	Select to require a supervisor's authorisation to print a time-hour report. See *Printing a time-hour report* on page 638.
Print whole day's receipts	Select to require a supervisor's authorisation to print the receipts of the day's takings. See *Printing a takings report* on page 636.
Redeem loyalty points	Select to require a supervisor's authorisation to redeem loyalty points in a transaction. See *Redeeming loyalty points* on page 484.
Refund gift voucher	Select to require a supervisor's authorisation to refund a gift voucher. See *Returning a gift voucher* on page 427.
Reprint last receipt	Select to require a supervisor's authorisation to reprint the last receipt. See *Reprinting the last receipt* on page 372.
Reprint table order	Select to require a supervisor's authorisation to reprint a table order. See *Reprinting an order* on page 627.
Reprint receipt	Select to require a supervisor's authorisation to reprint a receipt from the last thirty days. See *Reprinting a selected receipt* on page 373.
Retrieve table	Select to require a supervisor's authorisation to retrieve a table order. See *Adding to a table order* on page 618.
Save changes to one-shot buttons	Select to require a supervisor's authorisation to save changes made to one-shot buttons. *Setting up one-shot buttons* on page 101

Field	Description
	Tip: You can use this feature to allow one-shot button configurations to be set up by non-supervising operators, pending approval by a supervisor.
Set item discount	Select to require a supervisor's authorisation to apply a discount to an item. See *Applying a discount to an item* on page 434.
Set price to zero	Select to require a supervisor's authorisation to set an item's price to zero. See *Overriding the price of an item* on page 441.
Set tare	Select to require a supervisor's authorisation to set the scale tare for the currently selected item. See *Taring the scale* on page 418.
Set tax exempt status	Select to require a supervisor's authorisation to set the selected item to be tax exempt. See *Setting a transaction as tax exempt* on page 439
Set transaction discount	Select to require a supervisor's authorisation to apply a discount to a transaction. See *Discounting a transaction* on page 487.
Show external page	Select to require a supervisor's authorisation to display an external web page. See *Displaying an external web page* on page 387.
Training mode	Select to require a supervisor's authorisation to enable or disable training mode. See *Using the terminal training mode* on page 389.
Void item	Select to require a supervisor's authorisation to remove an item from a transaction. See *Voiding an item* on page 451.
Void transaction	Select to require a supervisor's authorisation to void a transaction. See *Voiding a transaction* on page 453.

Field	Description
X read	Select to require a supervisor's authorisation to perform an X read. See *Performing an X read* on page 383.
Z read	Select to require a supervisor's authorisation to perform a Z read. See *Performing a Z read* on page 385
ZZ read	Select to require a supervisor's authorisation to perform a ZZ read. See *Performing a ZZ read* on page 386.

Terminal setup screen - Customer orders tab

Use the Customer orders tab to define the default delivery fee and minimum deposit fee for customer orders.

See *Creating a customer order* on page 543.

Opening the Customer orders tab

To open the Customer orders tab:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

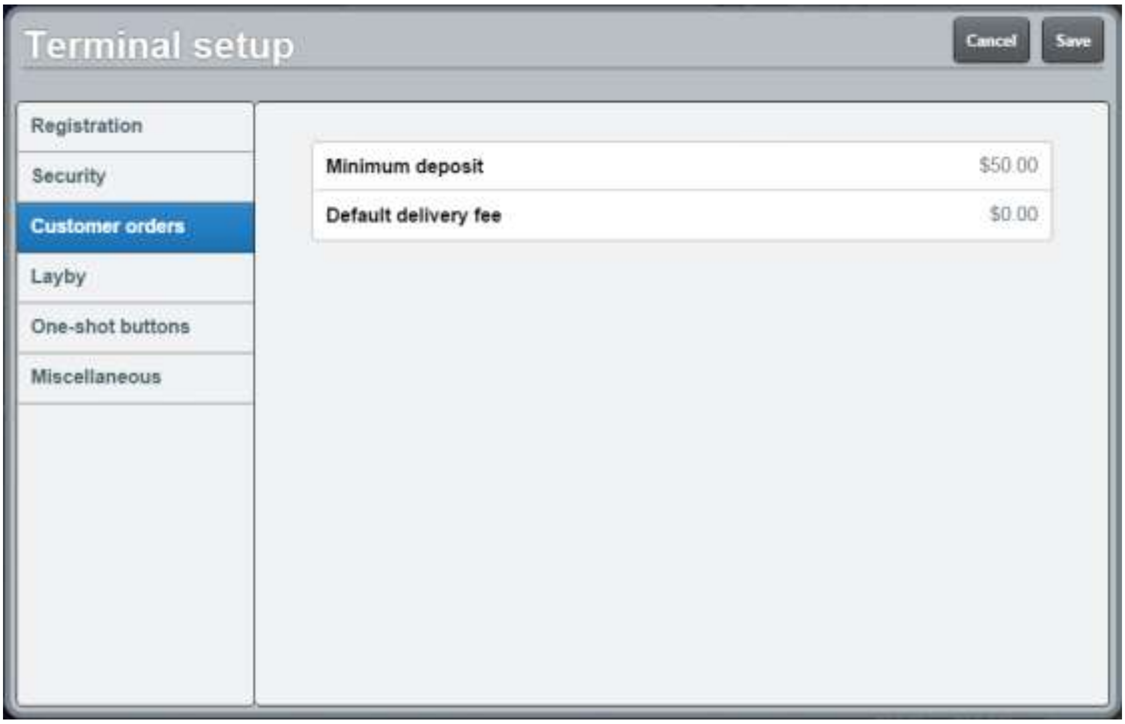
2. Press **Open setup**.

   The Terminal setup screen is displayed.

> **Note:** The Point of Sale displays the most recently-viewed tab in the Terminal setup screen.

3. Press **Customer orders**.

   The Customer orders tab is displayed.



Minimum deposit $50.00

Default delivery fee $0.00

Terminal setup screen - Customer orders tab key fields and buttons

Field	Description
Minimum deposit	Type in the minimum deposit customers must pay for all orders. Orders cannot be created if the deposit is less than this amount. **Note:** This is a flat-fee amount, not a percentage of the order. If your organisation policy requires a percentage of the order price as a deposit, this needs to be calculated manually when creating the order.
Default delivery fee	The default amount added to the order to cover delivery. This amount can be changed when creating an order.

Terminal setup screen - Layby tab

Use the Layby tab to define the fees, taxes and conditions of customer layby purchases at your site.

See *Setting up laybys on the Point of Sale* on page 26.

Opening the Layby tab

To open the Layby tab:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

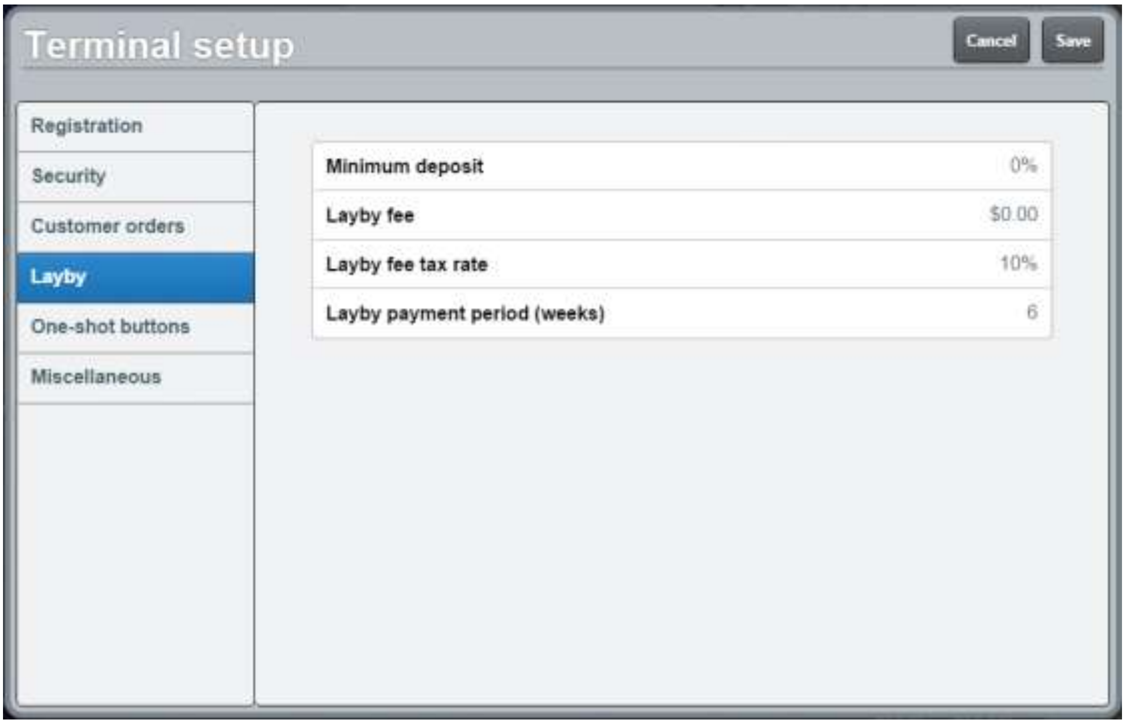
2. Press **Open setup**.

   The Terminal setup screen is displayed.

> **Note:** The Point of Sale displays the most recently-viewed tab in the Terminal setup screen.

3. Press **Layby**.

   The Layby tab is displayed.



Minimum deposit	0%
Layby fee	$0.00
Layby fee tax rate	10%
Layby payment period (weeks)	6

Terminal setup screen - Layby tab key fields and buttons

Field	Description
Minimum deposit	Type in the default minimum deposit customers must pay for all laybys. The deposit amount can be edited during layby creation. **Note:** This is a percentage of the layby. For example, type **10** to require a 10% deposit.
Layby fee	The amount added to the transaction to cover the cost of creating the layby. This amount can be edited when the layby is created.
Layby fee tax rate	The tax rate assigned to the layby fee.
Layby payment period (weeks)	The number of weeks after which the layby expires if not paid in full.

Terminal setup screen - One-shot buttons tab

Use the One-shot buttons tab to configure the available colour presets for one-shot buttons.

See *Creating one-shot button colour presets* on page 110.

> **Note:** Any changes made to the Point of Sale configuration do not take effect until the changes have been saved. Saving changes to the Point of Sale configuration always requires a supervisor's authorisation. See *Providing supervisor authorisation* on page 353.

Opening the Terminal setup screen - One-shot buttons tab

To open the One-shot buttons tab:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

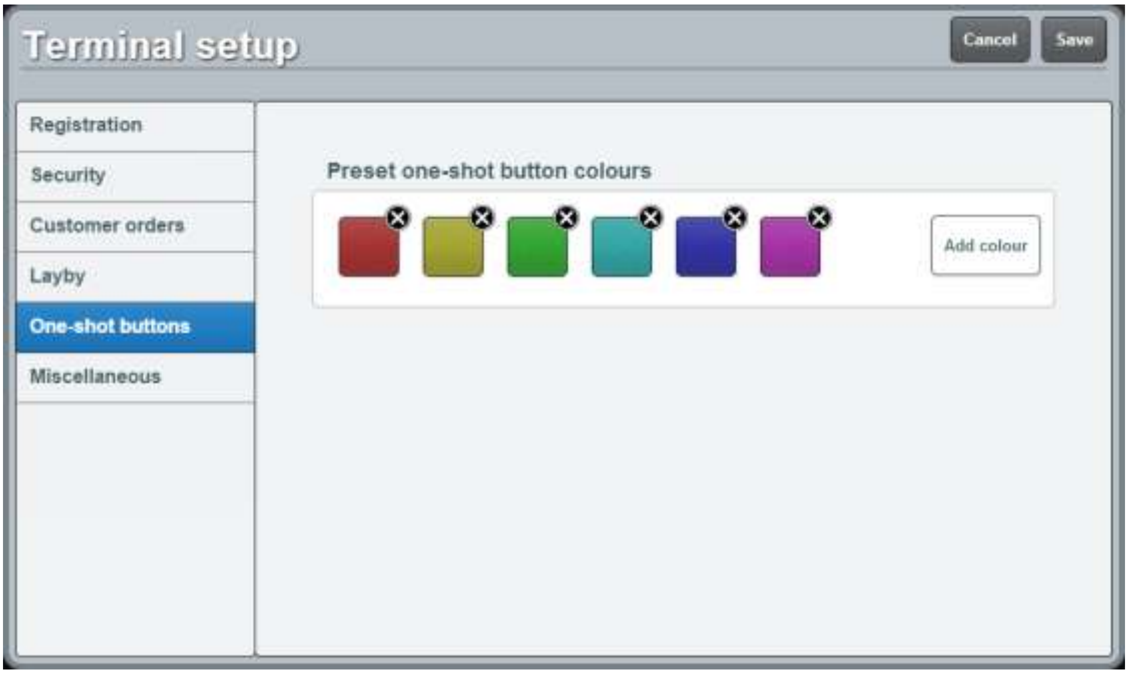
2. Press **Open setup**.

   The Terminal setup screen is displayed.

   > **Note:** The Point of Sale displays the most recently-viewed tab in the Terminal setup screen.

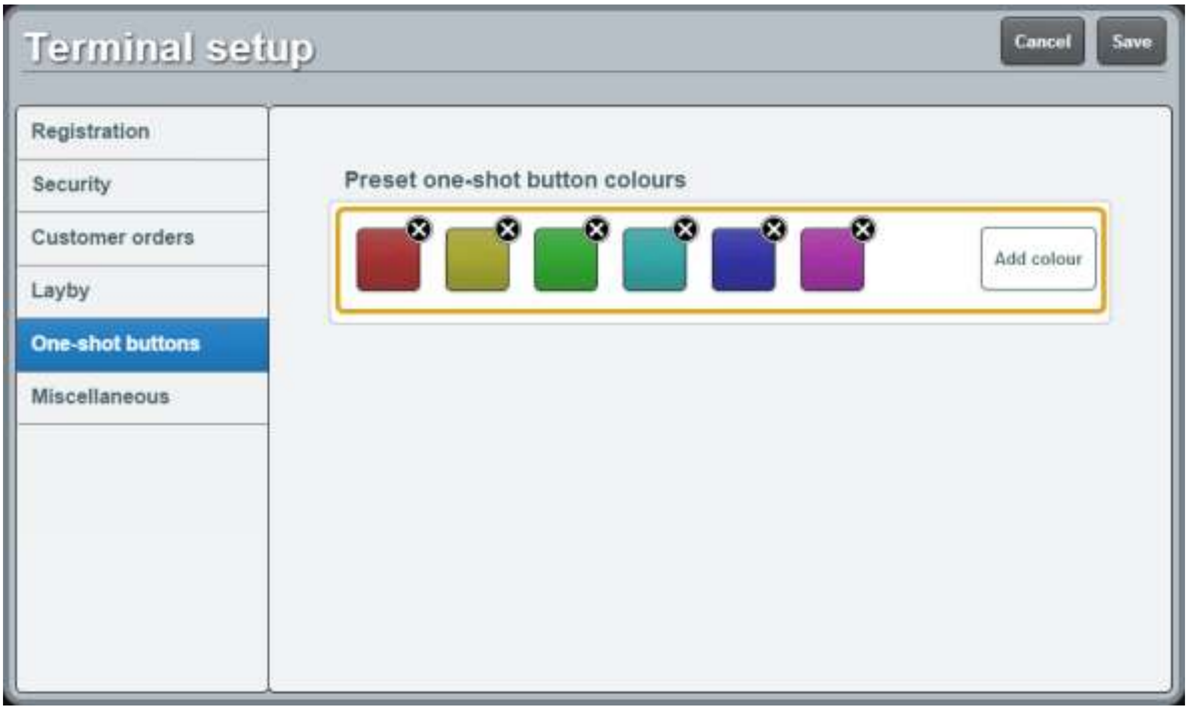
3. Press **One-shot buttons**.

   The One-shot buttons tab is displayed.


Terminal setup
Cancel
Save
Registration
Security
Customer orders
Layby
One-shot buttons
Miscellaneous
Preset one-shot button colours
Add colour

Terminal setup screen - One-shot buttons tab key fields and buttons

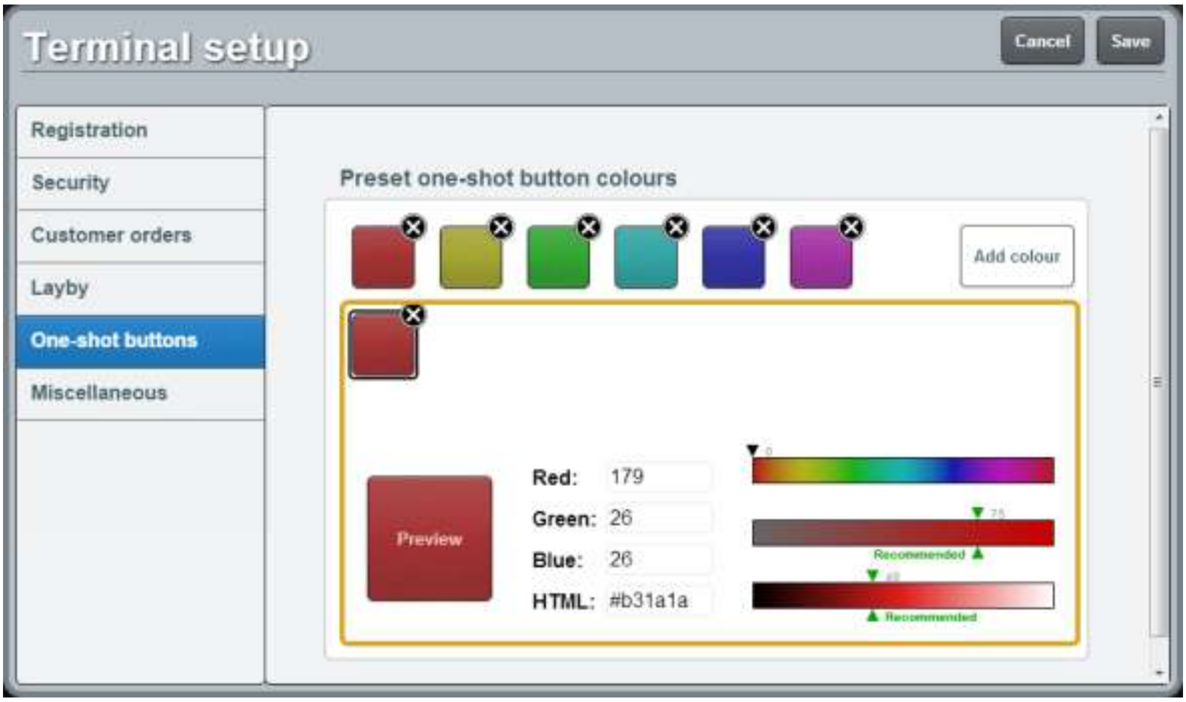
Preset one-shot button colours area



This area displays the existing colour presets you can use to create buttons.

Field	Description
🟥 ⊗	A button colour present. Press ⊗ to delete the preset.
Add colour	Press to open the Add button colour preset area. See *Setting up one-shot buttons* on page 101.

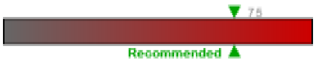
Add button colour preset area



Red: 179
Green: 26
Blue: 26
HTML: #b31a1a

Use this area to define a new button colour preset by either

- Typing colour level values into the **Red**, **Green** and **Blue** fields.
- Typing a hexadecimal RGB colour code into the **HTML** field.
- Selecting the preset's hue, saturation and brightness using the sliders.

Field	Description
	Preview of what a one-shot button would look like with the current settings.
Red	The level of red in the colour, from 0 to 255.
Green	The level of green in the colour, from 0 to 255.
Blue	The level of blue in the colour, from 0 to 255.
HTML	The hexadecimal RGB code of the colour.
	Use the slider to select the preset's hue.
	Use the slider to select the preset's colour saturation or press the recommended section. **Note:** The recommended section ensures the button's saturation matches the rest of the Point of Sale. The slider 'snaps' to the recommended section when dragged to the word **Recommended**.
	Use the slider to select the preset's colour brightness or press the recommended section. **Note:** The recommended section ensures the button's brightness matches the rest of the Point of Sale. The slider 'snaps' to the recommended section when dragged to the word **Recommended**.

Terminal setup screen - Miscellaneous tab

Use the Miscellaneous tab of the Terminal setup screen to:

- Configure service charges.

  See *Setting the service charges on the Point of Sale* on page 40
- Configure the appearance of the Quick amount buttons.

  See *Setting up the Point of Sale* on page 9.
- Enable and disable the iPad scanning mode.

  See *Using the iPad scanner* on page 362.

> **Note:** Any changes made to the Point of Sale configuration do not take effect until the changes have been saved. Saving changes to the Point of Sale configuration always requires a supervisor's authorisation. See *Providing supervisor authorisation* on page 353.

Opening the Miscellaneous tab of the Terminal setup screen

To open the Miscellaneous tab:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

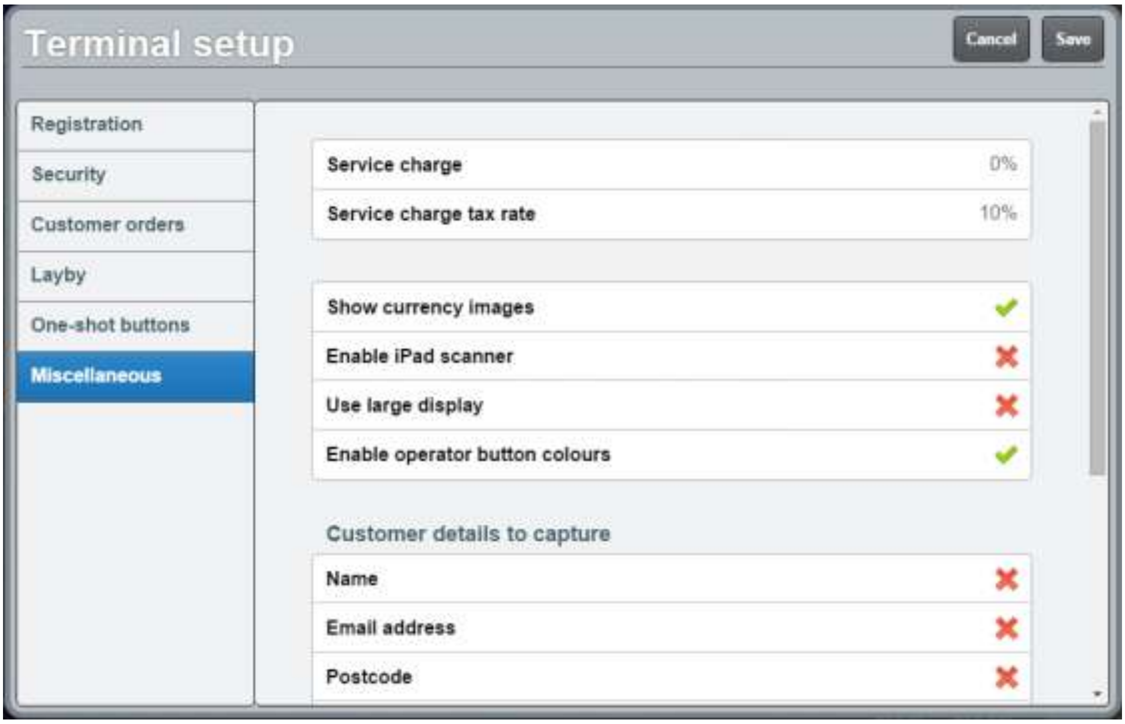
2. Press **Open setup**.

The Terminal setup screen is displayed.

> **Note:** The Point of Sale displays the most recently-viewed tab in the Terminal setup screen.

3. Press **Miscellaneous**.

   The Miscellaneous tab is displayed.



Service charge	0%
Service charge tax rate	10%
Show currency images	✓
Enable iPad scanner	✗
Use large display	✗
Enable operator button colours	✓

Customer details to capture

Name	✗
Email address	✗
Postcode	✗

Terminal setup screen - Miscellaneous tab key fields and buttons

Field	Description
Service charge (percent)	Type in a percentage of the transaction total to add on as a service charge. For example, if the **Service charge (percent)** is 10, a transaction with a total of $24 would have a service charge of $2.40 (10%) added to it. **Note:** Type **0** to disable service charges.
Service charge tax rate	Type the rate that service charges are taxed at. For example, if the Service charge tax rate was 16, the service charge of $2.40 would have a tax of $0.38 (16%) added to it. **Note:** Type **0** to disable service charge taxes.
Show currency images	Select to display pictures of the notes or coins on the Quick amount buttons instead of dollar amounts. **Note:** Currency images are not available for all currencies.
Enable iPad scanner	Select to enable a Bluetooth iPad scanner. **Note:** You should keep this disabled unless you are using a Bluetooth barcode scanner connected to an iPad. Scanners that connect to the base station or customer display do not require this option.
Use large display	Select to enable the large Item field in the Transaction screen. **Note:** This field is not displayed if your Point of Sale is in Scales certification compliance mode. See *Scales certification compliance mode* on page 644.

Customer details to capture

Field	Description
Name	Select to prompt for the customer's name during tender.
Email address	Select to prompt for the customer's email address during tender.
Postcode	Select to prompt for the customer's postcode during tender.
Phone	Select to prompt for the customer's phone number during tender.
Email receipt to customer	Select to email a receipt to the customer when the transaction is complete.

Table orders

Field	Description
Enable table orders	Select to enable the table service configuration options. Disable this field to hide the table service configuration options and make all transactions on the Point of Sale non-table service type by default.
Collect customer name when creating dine in orders	Select to prompt the operator for the customer's name when creating a dine in table order.
Collect number of covers when creating dine in orders	Select to prompt the operator for the number of people being served at a table when creating a dine in order.
Collect customer name when	Select to prompt the operator for the customer's name when

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>creating take away orders</td><td>creating a take away table order.</td></tr>
<tr><td>Collect number of covers when creating take away orders</td><td>Select to prompt the operator for the number of people being served at a table when creating a take away order.</td></tr>
<tr><td>Enable transaction type selection</td><td>Select to enable the dine in and take away buttons in the Select table screen, to allow operators to switch between dine in and take away transaction types when selecting tables.
See <i>Select table screen</i> on page 630.
Also see <i>Selecting a table</i> on page 614.</td></tr>
<tr><td>Default transaction type</td><td>Select which transaction type should be used by default. All transactions created use this type unless another type is selected.
<table>
<tr><td>Dine in</td><td>Select if transactions are usually dine in table service.</td></tr>
<tr><td>Take away</td><td>Select if transactions are usually take away table service.</td></tr>
<tr><td>Non-table service</td><td>Select if transactions usually do not involve table service.</td></tr>
</table></td></tr>
<tr><td>Auto-allocate table number when in name mode</td><td>Select if you want the Point of Sale to automatically allocate a table order to a table when the customer's name is collected. Tables are selected from the Auto-allocate table number range.</td></tr>
<tr><td>Auto-allocate table number range</td><td>Select the range of table numbers the Point of Sale can choose from when automatically allocating a table.
Note: Table numbers are configured when creating tables in the</td></tr>
</table>

Field	Description
	Portal. You may need to refer to the Portal table reports to see what table numbers your site uses. Make sure the range of table numbers you select gives the Point of Sale a reasonable number of tables to choose from. For example, **1-12** allows the Point of Sale to automatically allocate to tables numbered 1 through 12. If the Point of Sale can't find a table in this range, it prompts the operator to select a table.

Gift vouchers

Field	Description
Retrieve gift voucher details from local server	Select to use the local base station to retrieve and validate gift vouchers rather than the Portal.

Setting up a terminal

Before you can use a terminal to process transactions, it needs to be:

- Connected to a site.

  See *Connecting a terminal to a site* on page 81.
- Added to the correct terminal group.

  See *Connecting to a terminal group* on page 89.

Key concepts

Please see the *Glossary* on page 649 for information relating to the following terms:

Base station
Operator
Point of Sale
Site
Supervisor
Terminal
Terminal group

Also see:

- *Operator log in screen* on page 91.
- *POS registration screen* on page 93.
- *Basic terminal functions* on page 343.

What you can do:

The following topics explain tasks relating to setting up a terminal:

- *Connecting a terminal to a site* on page 81.
- *Configuring the terminal number* on page 84.
- *Moving a terminal to a new site* on page 85.
- *Connecting to a terminal group* on page 89.

The following topics explain tasks relating to setting up the Point of Sale:

- *Initial Point of Sale setup* on page 11.
- *Creating a terminal group on the Point of Sale* on page 13.
- *Setting the language and currency on the Point of Sale* on page 16.
- *Setting the security and permissions on the Point of Sale* on page 19.
- *Setting up gift vouchers on the Point of Sale* on page 22.
- *Setting up table service on the Point of Sale* on page 29.
- *Setting up external transaction payments on the Point of Sale* on page 43.
- *Setting the service charges on the Point of Sale* on page 40.
- *Setting up one-shot buttons* on page 101.

Also see:

- *Setting up the Point of Sale* on page 9.
- *Terminal setup screen - Registration tab* on page 44.
- *Terminal setup screen - Security tab* on page 50.
- *Terminal setup screen - One-shot buttons tab* on page 67.
- *Terminal setup screen - Miscellaneous tab* on page 72

Connecting a terminal to a site

Connect a terminal to a site when you want to use it to record transactions at that site.

To connect a terminal to a site:

1. Ensure you are within range of the site's local wireless network.
2. Connect your terminal device to the site's wireless network.
3. Load the Point of Sale on the terminal.

   The POS registration screen is displayed.

POS registration

Serial (Enter here)

Please enter your site's serial code

4. Type in the serial number of the site you want to connect to.

   The Point of Sale contacts the Portal to validate the serial number.

POS registration

Serial

Validating...

My serial won't validate If the serial number does not validate, check that you are using the serial number listed in the **Name** tab of the **Site Details** screen on the Portal.

POS registration

Sorry, that serial code is not valid

Once the serial number has validated, the terminal connects to the base station.

POS registration

Connecting to base station...

Once the terminal has connected to the base station, it displays the site the terminal has connected to.

POS registration

Site: Example

5. Press OK.

The terminal number is automatically assigned by the base station.

> **Note:** If the terminal has previously connected to this site, it automatically uses the terminal number it was assigned last time. You can change the terminal number using the Registration tab. See *Terminal setup screen - Registration tab* on page 44.

The Supervisor authorisation screen is displayed.

Please authorise the following action:
Change site

6. Type the operator code and password of a supervisor for the site you are changing to.

> **Note:** If you are not a supervisor at this site, your operator code will not work, even if you are a supervisor at another site. The terminal must be authorised by a supervisor of this site.

7. Press .

   The terminal is connected to the site.

   The Operator log in screen is displayed.

Configuring the terminal number

A terminal number identifies each terminal at a site. You can view or change a terminal's number in the Registration tab of the Terminal setup screen. See *Terminal setup screen - Registration tab* on page 44.

A terminal number is automatically configured by the base station when a terminal is first connected to a site. See:

- *Connecting a terminal to a site* on page 81.
- *Moving a terminal to a new site* on page 85.

Important Note: Changing a terminal number incorrectly may cause transactions to be rejected from the portal. Do not change the terminal number without direct instruction from AMC Convergent IT support.

Moving a terminal to a new site

Move a terminal to a new site if you need to use it to record transactions at another site.

> **Note:** If you have not connected this terminal to a site before, see *Connecting a terminal to a site* on page 81.

To move a terminal to a new site:

1. Ensure you are within range of the site's local wireless network.
2. Connect your terminal device to the site's wireless network.
3. Load the Point of Sale on the terminal.

   The Operator log in screen is displayed.

   > **Note:** If the Operator log in screen is not displayed, log all the operators out. See *Logging out of the terminal* on page 346.

4. Press Change site.

   > **Note:** If you cannot see the Change site button, ensure all operators are logged out of the terminal.

   The POS registration screen is displayed.

   POS registration

   Serial (Enter here)

   Please enter your site's serial code

5. Type in the serial number of the site you want to connect to.

   The Point of Sale contacts the Portal to validate the serial number.

POS registration

Serial [redacted]

Validating...

My serial won't validate If the serial number does not validate, check that you are using the serial number listed in the **Name** tab of the **Site Details** screen on the Portal.

POS registration

Serial [redacted]

Sorry, that serial code is not valid

Once the serial number has validated, the terminal connects to the base station.

POS registration

Serial [redacted]

Connecting to base station...

Once the terminal has connected to the base station, it displays the site the terminal has connected to.

Site: Example

6. Press **OK**.

   The terminal number is automatically assigned by the base station.

> **Note:** If the terminal has previously connected to this site, it automatically uses the terminal number it was assigned last time. You can change the terminal number using the Registration tab. See *Terminal setup screen - Registration tab* on page 44.

The Supervisor authorisation screen is displayed.

Please authorise the following action:
Change site

7. Type the operator code and password of a supervisor for the site you are changing to.

> **Note:** If you are not a supervisor at this site, your operator code will not work, even if you are a supervisor at another site. The terminal must be authorised by a supervisor of this site.

8. Press **Authorise**.

   The terminal is connected to the site.

   The Operator log in screen is displayed.


Operator log in
Operator:
Password:
Change site
Log in

Connecting to a terminal group

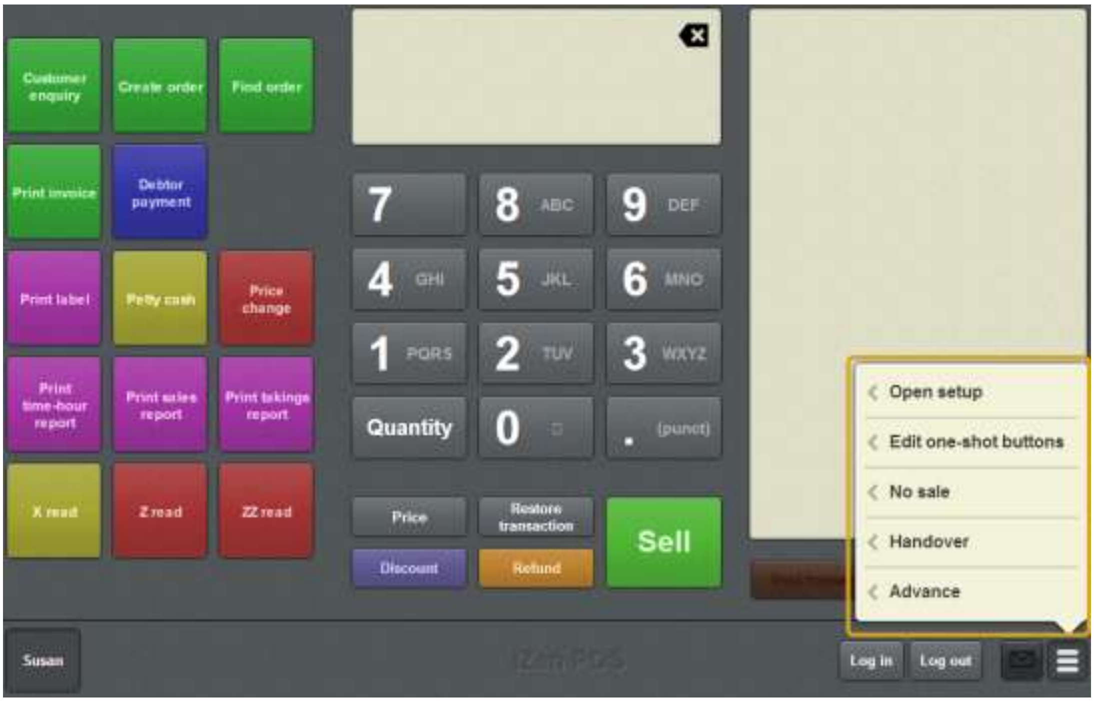
Connect to a terminal group to utilise that group's terminal configuration.

> **Important Note:** When a terminal is connected to a group, it loads that group's terminal configuration. Any configurations previously set on the terminal are overwritten. Any changes that are made to the configuration while the terminal is connected to a group affect all terminals connected to that group across all sites within the company.

To connect a terminal to a group:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.



2. Press **Open setup**.

   The Terminal setup screen is displayed.

> **Note:** The Point of Sale displays the most recently-viewed tab in the Terminal setup screen.

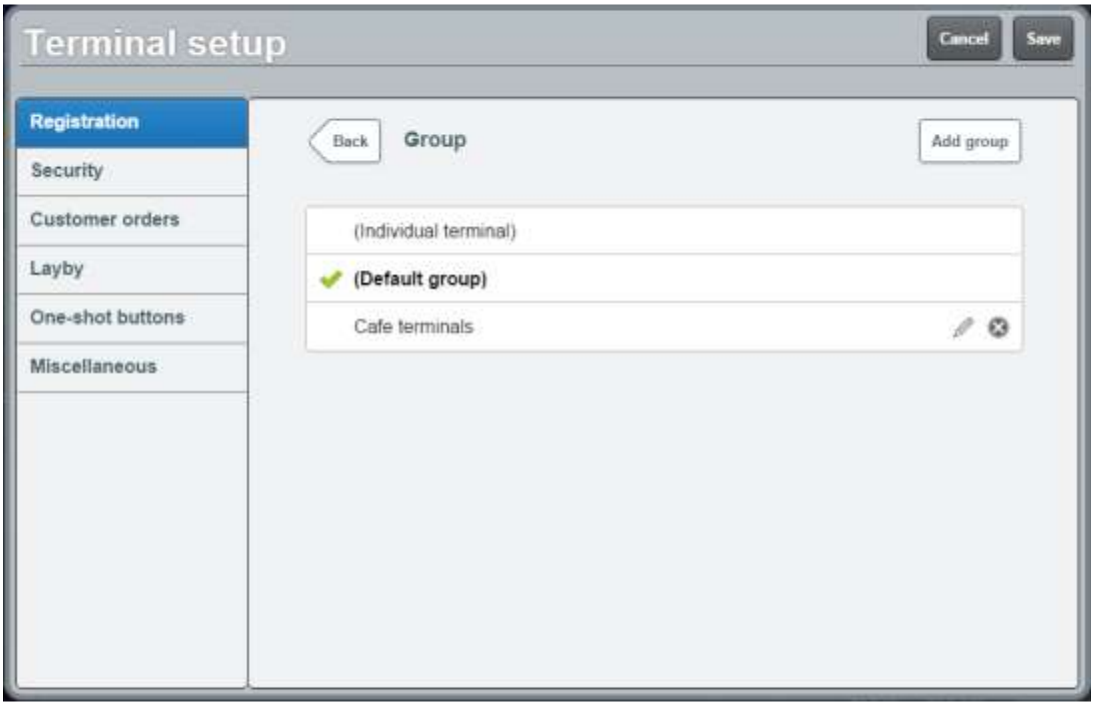
3. Press **Registration**.

   The Registration tab is displayed.

Site	Chadstone
Group	(Default group)
Terminal	5
Scale	None
Language	English
Currency	Australian Dollar
Version	iZen POS v1.2.29
Build	c1de7fe

4. Press **Group**.

   The available groups are displayed.



(Individual terminal)

✓ **(Default group)**

Cafe terminals

5. Press the group you want to use.

   The terminal uses the settings of the selected group.

Operator log in screen

Use the Operator log in screen to:

- Log into the Point of Sale with your operator number and password.

  See *Logging in to the terminal* on page 348.

- Connect the terminal to a different site.

  See *Moving a terminal to a new site* on page 85.

Opening the Operator log in screen

The Operator log in screen is displayed when you launch the Point of Sale in the terminal.

> **Note:** If this terminal hasn't been configured, the POS registration screen is displayed instead. See *POS registration screen* on page 93.

To open the Operator log in screen from within the Point of Sale:

1. From the Transaction screen, press **Log in**.

   > **Note:** If the Point of Sale is not configured to allow multiple operators logged in at the same time, the **Log in** is disabled. Press **Log out** to log out the current operator so you can log in. See *Setting the security and permissions on the Point of Sale* on page 19.

   The Operator log in screen is displayed.

Operator log in screen key fields and buttons

Field	Description
Operator	Type in your operator code.
Password	Type in your password.
	Press to return to the Transaction screen without logging in. **Note:** This button is only displayed if a staff member is already logged in to the terminal
	Press to move the terminal to a new site. See *Moving a terminal to a new site* on page 85. **Note:** This button is only displayed if no staff members are logged in to the terminal.
	Press to log in to the terminal.

POS registration screen

Use the POS registration screen to register a terminal to a site.

See *Connecting a terminal to a site* on page 81.

Opening the POS registration screen

To open the POS registration screen:

1. From the Transaction screen, press **Log out** until all operators are logged out.

   The Operator log in screen is displayed.

2. Press **Change site**.

   The POS registration screen window is displayed.

Please enter your site's serial code

POS registration screen key fields and buttons

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Serial</td><td>Type the serial number of the site you want to connect the terminal to.
Note: To connect to a site, you must be connected to the wireless network on the site's premises.</td></tr>
<tr><td>Status</td><td>Indicates the status of the site connection:
<table>
<tr><th>Status</th><th>Description</th></tr>
<tr><td>Please enter your site's serial code</td><td>The terminal is waiting for a serial code.</td></tr>
<tr><td>Validating</td><td>The terminal is validating the site serial number with the portal.</td></tr>
<tr><td>Connecting to base station</td><td>The terminal has validated the site serial number and is connecting to the site's base station.</td></tr>
<tr><td>No base station configured for site</td><td>The site base station is not registered with the Portal. Contact AMC Convergent IT for assistance.</td></tr>
<tr><td>Site (Site name)</td><td>The terminal has connected to the named site.</td></tr>
<tr><td>Sorry, that serial code is not valid</td><td>The serial number you have entered is not a valid serial number.</td></tr>
</table></td></tr>
<tr><td>OK</td><td>Once the site has been validated, press to connect to the site. See <i>Moving a terminal to a new site</i> on page 85.</td></tr>
</table>

Setting up the Point of Sale layout

You can create a layout of different functions to suit your organisation using one-shot buttons and one-shot button pages.

One-shot buttons

One-shot buttons are custom buttons that can be configured to perform special functions on the Point of Sale. They can be placed directly on the left side of the Point of Sale, or within one-shot button pages. You can configure different button sizes, colours and background images to help distinguish different buttons. You can create as many one-shot buttons as you need.

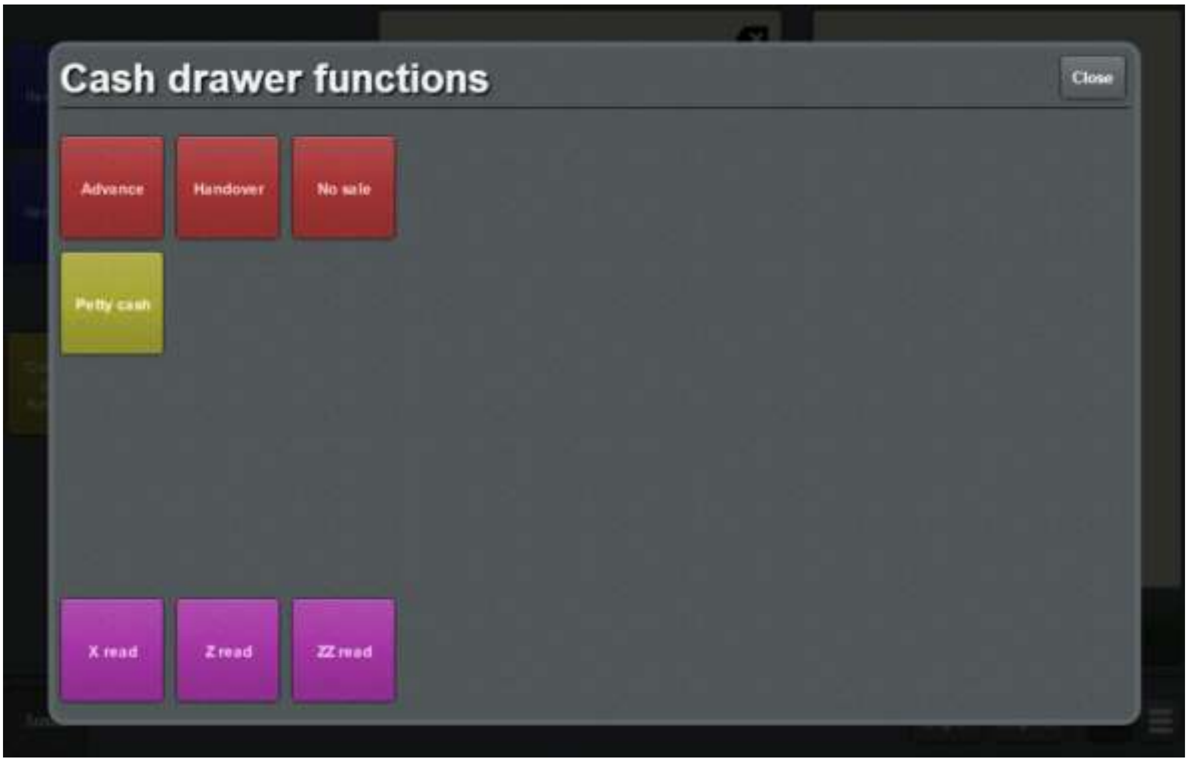
For more information on setting up one-shot buttons, see *Setting up one-shot buttons* on page 101.

One-shot button pages

One-shot button pages are special screens that pop up to display your one-shot buttons. You can use one-shot button pages if you have more one-shot buttons than fit on your Transaction screen or as a way to organise your one-shot buttons clearly. For example, you may have a page of buttons for:

- easy access to items on special or impulse-buy items
- terminal functions like handovers and petty cash
- your layout of cafe tables.

To open a one-shot button page, press a one-shot button that has been configured to open that page. Pages can even contain one-shot buttons that open other pages. You can create as many one-shot button pages as you need, but each page you create needs its own one-shot button to open it.



Tip: We recommend you place buttons that open one-shot button pages on the Transaction screen. If you create 'chains' of pages, where buttons on one page open more pages, you can accidentally lose access to a page if the chain is broken by someone moving or editing a button on a page earlier in the chain.

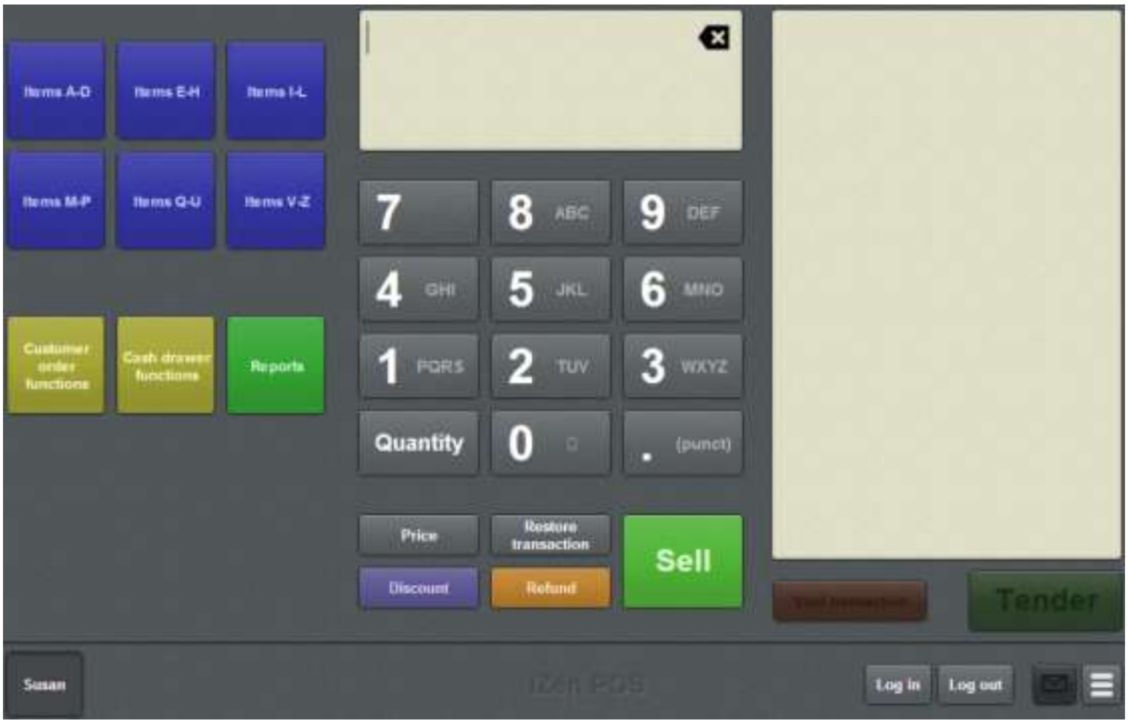
Note: If you delete the one-shot button that opens a one-shot button page, you cannot open or edit that page, but the page itself is not deleted. You can retrieve it by creating another one-shot button that opens that page.

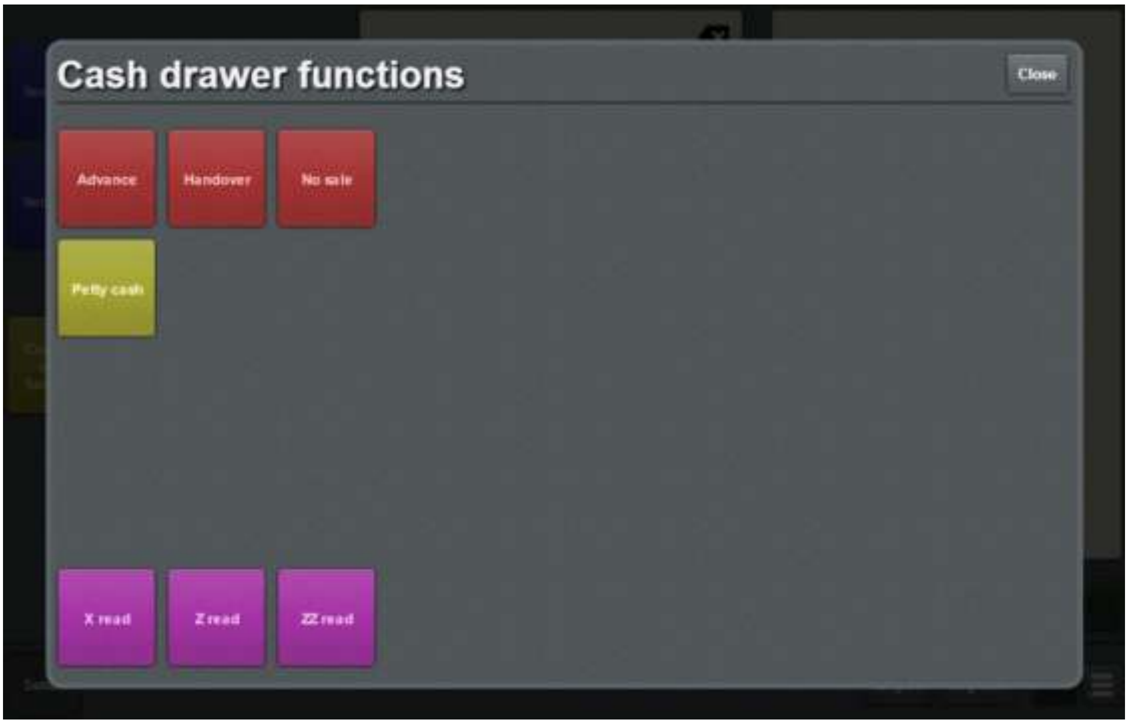
For more information on setting up one-shot button pages, see *Setting up one-shot pages* on page 131

Example Point of Sale layouts

The following screenshots show example Point of Sale layouts to help you consider the best layout for your organisation.

- A layout that makes use of one-shot button pages to list quick-reference items and Point of Sale functions:





- A layout for an organisation that runs table service and appointments:

- A layout for an organisation that primarily handles customer orders:

Setting up one-shot buttons

By setting up one-shot buttons for certain actions, you can:

- Enable some Point of Sale features such as gift vouchers and table service.
- Provide short-cuts to common tasks like price overrides or frequently-purchased items.

See the table for a full list of one-shot button actions.

> **Note:** You can press Cancel to undo the changes you have made to the one-shot buttons. This cancels all the changes you have made since you started editing one-shot buttons. See *Cancelling changes to one-shot buttons* on page 118.

To set up one-shot buttons on your Point of Sale:

1. Select or create a terminal group for your terminal.

   Any one-shot buttons you create are saved to this group.

   See *Creating a terminal group on the Point of Sale* on page 13.

   > ⚠ **Important Note:** Even if you don't think you'll need more than one terminal group, we recommend you use a group to make any future changes to your terminal settings easier to manage.

2. Plan your button layouts for the Transaction screen and any one-shot button pages you want.

   > **Note**: Once created, buttons can't be moved from one page to another, or from a page to the Transaction screen. If you put a button on the wrong page, you must delete it and recreate it where you want it to be displayed. Consider how many buttons you will need and plan your layout before you start creating buttons.

3. Create any one-shot button pages you need.

   See *Setting up one-shot pages* on page 131.

4. Create buttons for the functions you need.

   See the list of functions below.

5. Edit each button's label, if required.

   See *Changing the appearance and text of a one-shot button label* on page 119.

6. Edit each button's background colour and image.

See *Changing the background colour or image of a one-shot button* on page 122.

One-shot button actions

Action	Description	See
No action	The button does nothing.	*Creating a one-shot button without an action* on page 114.
Advance	The button opens the Advance screen. See *Recording an advance* on page 355.	*Creating a one-shot button for advances* on page 143.
Create order	The button starts the creation of a customer order. See *Creating a customer order* on page 543.	*Creating a one-shot button to create orders* on page 151.
Create layby	The button starts the creation of a customer layby. See *Creating a layby* on page 559.	*Creating a one-shot button to create laybys* on page 155.
Customer sign in	The button signs a customer in using a scanned loyalty card. See *Signing customers in* on page 524.	*Creating a one-shot button to sign a customer out* on page 163
Customer sign out	The button signs a customer out using a scanned loyalty card. See *Signing customers out* on page 526.	*Creating a one-shot button to sign a customer out* on page 163.
Debtor enquiry	The button launches the Find debtor screen to view a debtor's details or add the debtor to a transaction as a customer. See *Finding a customer* on page 541.	*Creating a one-shot button for debtor enquiries* on page 147.

Action	Description	See
	Also see *Performing a debtor enquiry* on page 587.	
Debtor payment	The button launches the Find debtor screen to add a debtor payment to the transaction. See *Adding a debtor payment to a transaction* on page 593.	*Creating a one-shot button for debtor payments* on page 167.
Edit one-shot buttons	The button enables editing of one-shot buttons. See *Editing one-shot buttons* on page 324.	*Creating a one-shot button to edit one-shot buttons* on page 135.
Find layby	The button opens the Find customer screen to find a layby by customer. See *Finding an layby* on page 563.	*Creating a one-shot button to find laybys* on page 171.
Find loyalty card	This button opens the Find loyalty card screen to find a loyalty card by name. For example to add a loyalty member to a transaction. See *Finding a loyalty card by name* on page 518.	*Creating a one-shot button to find loyalty cards* on page 175.
Find order	The button opens the Find customer screen to find an order by customer. For example, to add the order to the transaction. See *Finding an order* on page 547.	*Creating a one-shot button to find orders* on page 179.
Gift voucher	The button creates a gift voucher and adds it to the transaction. See *Creating gift vouchers* on page 421.	*Creating a one-shot button to sell gift vouchers* on page 224.

Action	Description	See
Handover	The button opens the Handover screen. See *Recording a handover* on page 357.	*Creating a one-shot button for handovers* on page 183.
Load external transaction	The button imports a transaction from an external source such as the Scheduler or third-party application to be processed and paid for through the Point of Sale. See *Retrieving external transactions* on page 606.	*Creating a one-shot button to retrieve an external transaction* on page 262.
Modify item	The button adds and removes options from an item. See *Adding options to items* on page 432.	*Creating a one-shot button to modify items* on page 220.
Move table	The button opens the Select table screen to move the current table-service transaction to another table. See *Moving a transaction to another table* on page 625.	*Creating a one-shot button to move a transaction to another table* on page 187.
No sale	The button records a no-sale. See *Recording a no-sale* on page 354.	*Creating a one-shot button to record no-sales* on page 195.
Open one-shot page	The button opens a page of one-shot buttons. See *Setting up one-shot pages* on page 131.	*Creating a one-shot button to open a one-shot button page* on page 126.
Open setup	The button opens the Terminal setup screen. See *Terminal setup screen - Registration tab* on page 44.	*Creating a one-shot button to open the Terminal setup screen* on page 139.

Action	Description	See
Override price	The button overrides the price of the selected item. See *Overriding the price of an item* on page 441.	*Creating a one-shot button to override an item price* on page 216.
Petty cash	The button opens the Petty cash screen to record petty cash expenses. See *Recording petty cash expenses on the Point of Sale* on page 376.	*Creating a one-shot button for petty cash* on page 229.
Print bill	The button prints the transaction and bill for the selected table. See *Printing a bill for a table* on page 629.	*Creating a one-shot button to print a table bill* on page 233.
Price change	The button opens the Price change window to change the price for an item across a site, and send that change back to the Portal to be stored permanently. See *Changing an item's price on the Portal* on page 359.	*Creating a one-shot button to change an item's price on the Portal* on page 191.
Print invoice	The button prints a customer invoice when the transaction is finalised. See *Printing an invoice* on page 557.	*Creating a one-shot button to print invoices* on page 241.
Print sales report	The button prints a sales report. *Printing a sales report* on page 634.	*Creating a one-shot button to print sales reports* on page 270.
Print takings report	The button prints a takings report. *Printing a takings report* on page 636.	*Creating a one-shot button to print takings reports* on page 274.

Action	Description	See
Print time-hour report	The button prints a time-hour report. See *Printing a time-hour report* on page 638.	*Creating a one-shot button to print time-hour reports* on page 278.
Print whole day's receipts	The button prints all of the receipts generated that day. See *Printing the day's receipts* on page 640.	*Creating a one-shot button to print the day's receipts* on page 282.
Refund gift voucher	The button refunds a gift voucher. See *Returning a gift voucher* on page 427.	*Creating a one-shot button to return a gift voucher* on page 266.
Reprint last receipt	The button reprints the receipt of the terminal's most recent transaction. See *Reprinting the last receipt* on page 372.	*Creating a one-shot button to reprint the last receipt* on page 245.
Reprint order	The button reprints the selected table's order. See *Reprinting an order* on page 627.	*Creating a one-shot button to reprint an order* on page 199.
Reprint receipt	The button reprints the receipt of a selected transaction from the last thirty days. See *Reprinting a selected receipt* on page 373.	*Creating a one-shot button to reprint a selected receipt* on page 253.
Retrieve table	The button retrieves a specific table from the Portal for a new or existing table order. See *Waiting tables* on page 609.	*Creating a one-shot button to retrieve a table* on page 257.
Select table	The button displays a popup of the current free or active tables to select.	*Creating a one-shot button to select a free or active table* on page

Action	Description	See
	See *Selecting a table* on page 614.	286.
Sell item	The button finds a specific item. You can then add the item to the current transaction. See *Finding an item* on page 411.	*Creating a one-shot button to sell or look up an item* on page 203.
Set item discount	The button sets a specified discount on the currently-selected item. See *Applying a discount to an item* on page 434.	*Creating a one-shot button to set a discount* on page 208.
Set quantity	The button sets the quantity of the selected item in the Transaction list. See *Changing an item's quantity* on page 429.	*Creating a one-shot button to edit item quantities* on page 212.
Set table type	The button sets the current transaction to be one of: ▪ A non-table service transaction. ▪ A dine in transaction. ▪ A take away transaction. **Note:** Transaction types cannot be changed if items have been sent to the kitchen. See *Selecting a table* on page 614.	*Creating a one-shot button to set a transaction type* on page 291.
Set tare	The button sets the scale tare for the selected item. See *Taring the scale* on page 418.	*Create a one-shot button to tare the scale* on page 300.
Set tax	The button sets the current transaction to	*Creating a one-shot*

Action	Description	See
exempt	be exempt from sales tax such as VAT or GST. See *Setting a transaction as tax exempt* on page 439.	*button to make a transaction exempt from tax* on page 308.
Show external page	The button displays an external web page. See *Displaying an external web page* on page 387.	*Creating a one-shot button to display an external web page* on page 295.
Training mode	The button sets the terminal into training mode for staff training, and back to sales mode for normal use. See *Using the terminal training mode* on page 389.	*Creating a one-shot button to enter and exit training mode* on page 304.
X read	The button prints an X read report. See *Performing an X read* on page 383.	*Creating a one-shot button to perform X reads* on page 312.
Z read	The button prints a Z read report and clears the cash-drawer totals. See *Performing a Z read* on page 385.	*Creating a one-shot button to perform Z reads* on page 316.
ZZ read	The button prints a ZZ read report and clears the cash-drawer totals and the day's receipts and transactions. See *Performing a ZZ read* on page 386.	*Creating a one-shot button to perform ZZ reads* on page 320.

Creating one-shot button colour presets

Create one-shot colour presets to make it easy to select the colours you want for one-shot buttons on your Point of Sale.

See *Terminal setup screen - One-shot buttons tab* on page 67.

To create a one-shot button preset:

1. From the Transction screen, press ☰.

   The Point of Sale menu is displayed.

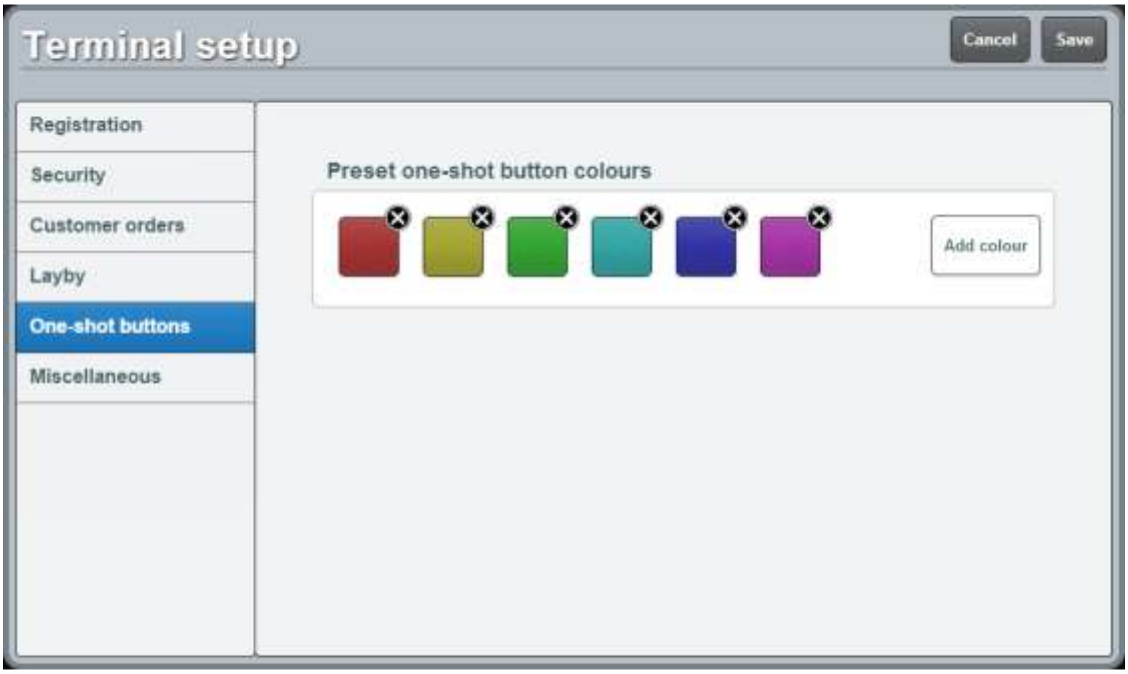
2. Press **Open setup**.

   The Terminal setup screen is displayed.

> **Note:** The Point of Sale displays the most recently-viewed tab in the Terminal setup screen.

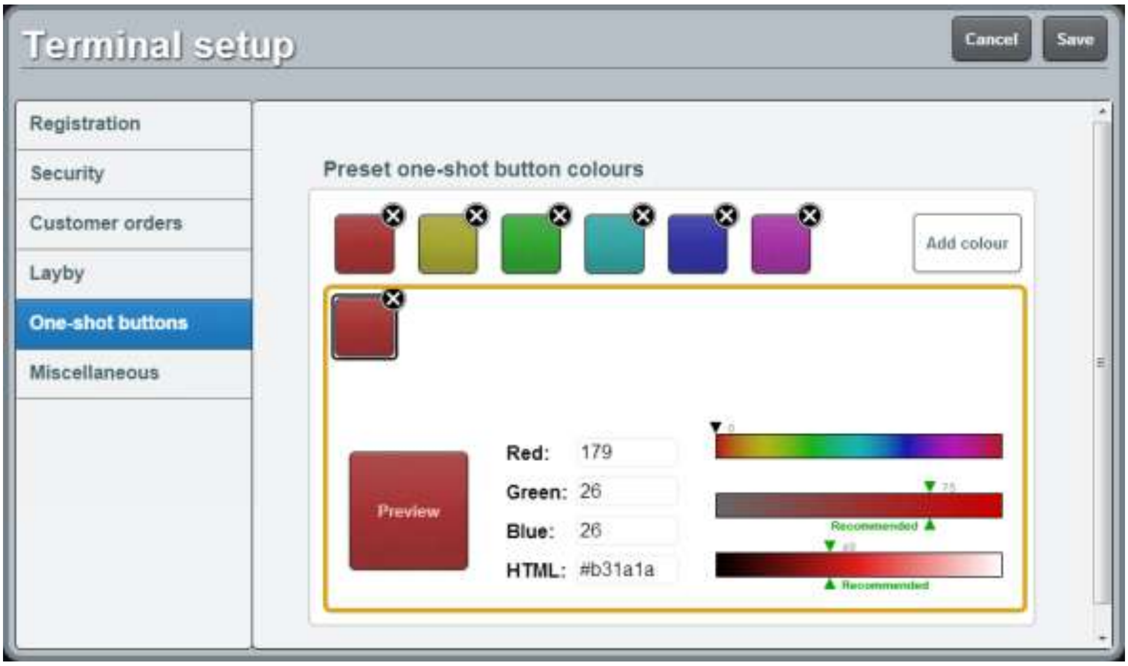
3. Press **One-shot buttons**.

   The One-shot buttons tab is displayed.



4. Press Add colour.

   The Add colour present area is displayed.

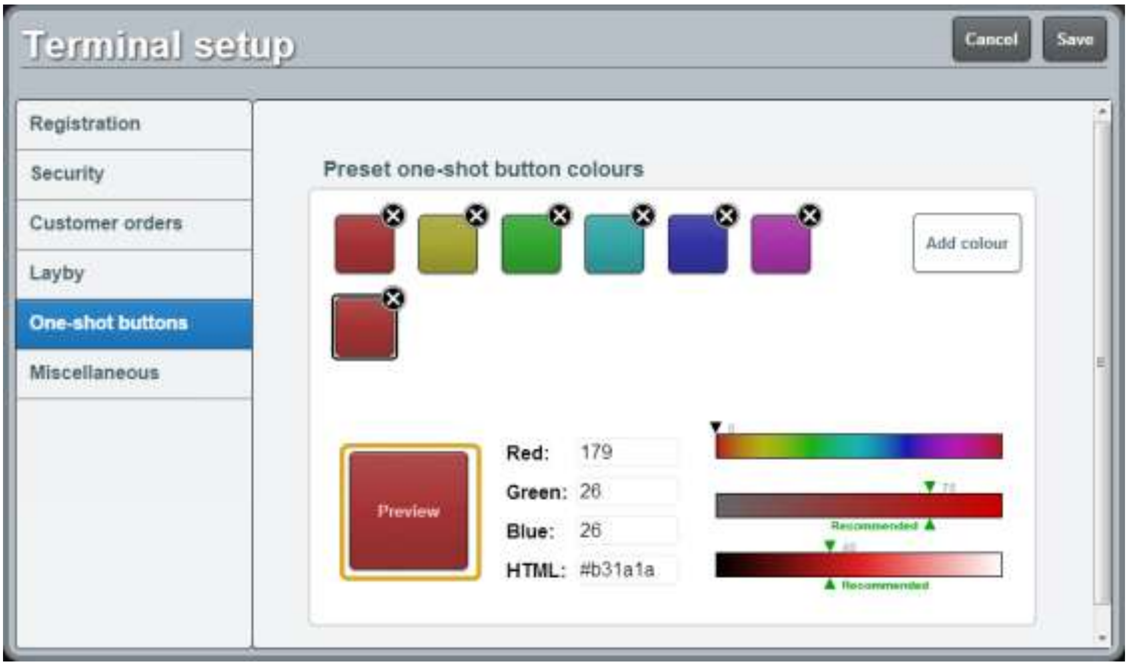


Red: 179
Green: 26
Blue: 26
HTML: #b31a1a

5. Either:
   - Type in the **Red**, **Green** and **Blue** colour values, between 0 and 256.
   - Type in the hexadecimal RGB colour code in the **HTML** field.
   - Select the colour you want from the **Hue** slider, and adjust the **Saturation** and **Brightness** sliders.

> **Note:** The Point of Sale recommends the best Saturation and Brightness level to ensure your buttons suit the Point of Sale. Press the **Recommended** area to select the recommended levels.

The Preview button displays what the buttons look like with your selections.



Red: 179
Green: 26
Blue: 26
HTML: #b31a1a

See *Terminal setup screen - One-shot buttons tab* on page 67.

6. Press Save.

   The Supervisor authorisation screen is displayed.

Please authorise the following action:
Save changes to setup

Site: Chadstone

7. Type in your supervisor operator code and password.
8. Click Authorise.

The changes are saved.

Creating a one-shot button without an action

You can create one-shot buttons that do not perform any actions. This can be useful if you want to reserve buttons for future functions or experiment with the layout of the buttons.

To create a one-shot button without an action:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

2. Press **Edit one-shot buttons**.

   One-shot button editing is enabled on the Transaction screen.

Note: You cannot use one-shot buttons while editing is enabled, with the exception of buttons that open one-shot button pages. Save or cancel your changes if you want to use the buttons.

3. Press and hold where you want the one-shot button to be placed.

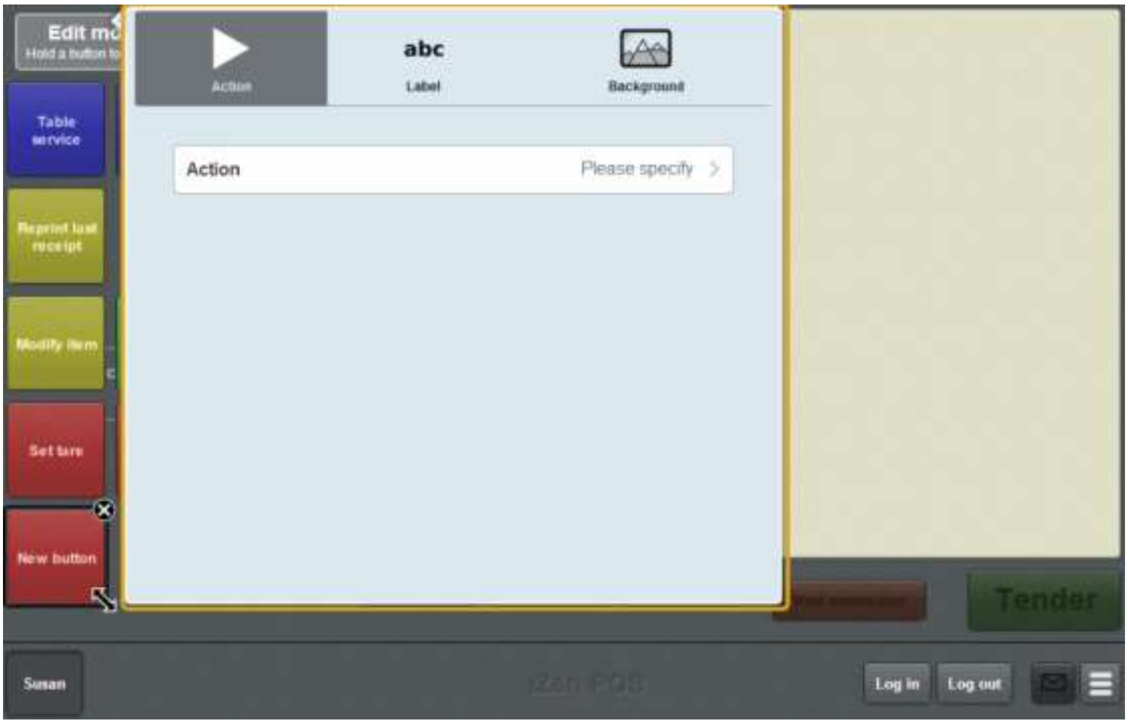
   The One-shot button screen is displayed.

Note: The Point of Sale displays the most recently-viewed tab of the One-shot button screen. This is useful if you want to quickly edit the same attributes of multiple buttons.

Tip: If you have already created a one-shot button, the Point of Sale matches the background and font of the closest one-shot button when creating a new button. If you need to create several buttons that look alike, create them near each other and then drag them to where you want them to appear.

4. Press ▶.

   The Action tab of the One-shot button screen is displayed.



5. Press **Action**.

   The list of available one-shot button actions is displayed.

6. Press **No action**.
   The button is configured to do nothing.
7. If you want to change the appearance or text of the button's label, see *Changing the appearance and text of a one-shot button label* on page 119.
8. If you want to change the background colour or image of the button, see *Changing the background colour or image of a one-shot button* on page 122.

> **Note:** You can configure the terminal to require a supervisor's authorisation to perform this button's function. See *Terminal setup screen - Security tab* on page 50.

9. Press anywhere on the Transaction screen to close the One-shot button screen.
10. Press Save.

    The one-shot buttons are saved.

Cancelling changes to one-shot buttons

You can cancel all changes made to one-shot buttons at any time. This cancels all changes made since the one-shot button edit mode was activated.

For example, if you open the one-shot button edit mode and edit three buttons before cancelling, no changes to any of the buttons are recorded. All one-shot buttons are returned to the settings that were last saved.

To cancel changes to one-shot buttons:

1. From the one-shot button editing mode, press Cancel.

All unsaved changes are cancelled and the one-shot button editing mode is closed.

Changing the appearance and text of a one-shot button label

Change the appearance and text of the one-shot button label to control:

- Whether a text label is displayed on the button.
- Where on the button the label is displayed.
- What font, size and colour the label is displayed in.

See *One-shot button screen - Label tab* on page 332.

> **Note:** You can press Cancel to undo the changes you have made to the one-shot buttons. This cancels all the changes you have made since you started editing one-shot buttons. See *Cancelling changes to one-shot buttons* on page 118.

To edit the appearance or text of a one-shot button label:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

2. Press **Edit one-shot buttons**.

   One-shot button editing is enabled on the Transaction screen.

My buttons don't work: You cannot use one-shot buttons while editing is enabled, with the exception of buttons that open one-shot button pages. Save or cancel your changes if you want to use the buttons.

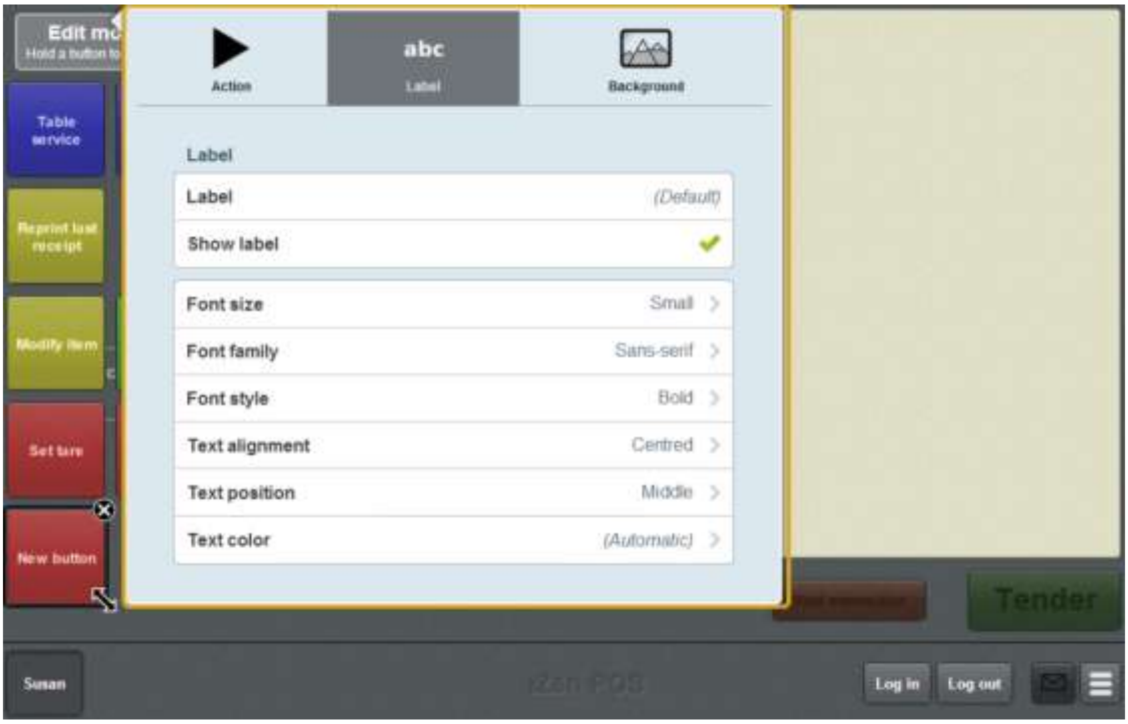
3. Press and hold the one-shot button you want to edit.

   The One-shot button screen is displayed.

Note: The Point of Sale displays the most recently-viewed tab of the One-shot button screen. This is useful if you want to quickly edit the same attributes of multiple buttons.

4. Press **abc**.

   The Label tab of the One-shot button screen is displayed.



Label

Label	(Default)
Show label	✓
Font size	Small
Font family	Sans-serif
Font style	Bold
Text alignment	Centred
Text position	Middle
Text color	(Automatic)

> **Note:** If you override the default label, the button text no longer updates. For example, one-shot buttons representing tables do not display the customer name if the button label has been overridden.

5. Type the label you want to appear.

> **Note:** If you want to restore a button to its default text, delete all the text in the **Label** field.

6. If you want to hide the label, set **Show label** to false (✖).

   The label does not display.

7. If you want to change the font, colour, size or placement of the label, use the Font area fields. See *One-shot button screen - Label tab* on page 332.
8. Press anywhere on the Transaction screen to close the One-shot button screen.
9. Press Save.

   The one-shot buttons are saved.

Changing the background colour or image of a one-shot button

Change the background colour or image of a one-shot button to help group similar buttons together, or set different ones apart. You can:

- Use a colour preset for the button's background colour.
- Specify a custom colour for the button's background colour.
- Use an image from the Portal.

See *One-shot button screen - Background tab* on page 337.

> **Note:** You can press Cancel to undo the changes you have made to the one-shot buttons. This cancels all the changes you have made since you started editing one-shot buttons. See *Cancelling changes to one-shot buttons* on page 118.

To edit the background of a one-shot button:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

2. Press **Edit one-shot buttons**.

   One-shot button editing is enabled on the Transaction screen.

My buttons don't work: You cannot use one-shot buttons while editing is enabled, with the exception of buttons that open one-shot button pages. Save or cancel your changes if you want to use the buttons.

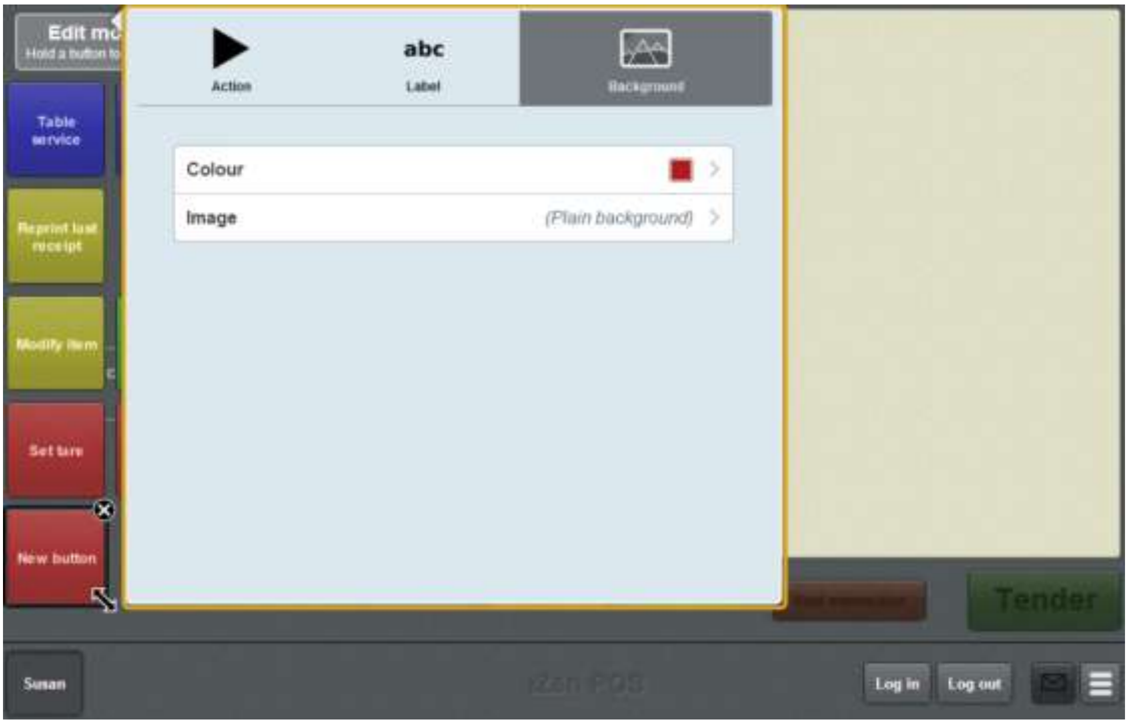
3. Press and hold the one-shot button you want to edit.

   The One-shot button screen is displayed.

Note: The Point of Sale displays the most recently-viewed tab of the One-shot button screen. This is useful if you want to quickly edit the same attributes of multiple buttons.

4. Press .

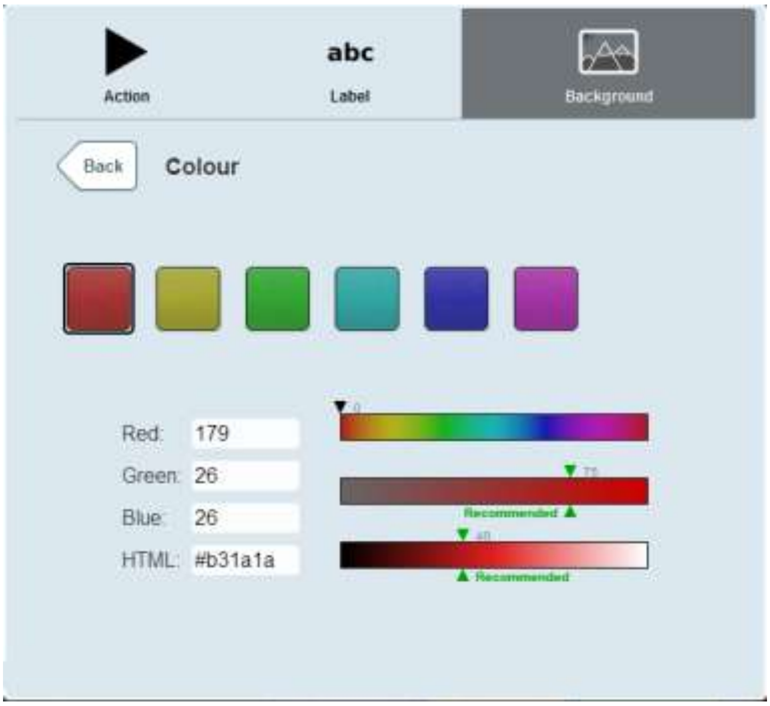
   The Background tab of the One-shot button screen is displayed.



Colour
Image (Plain background)

5. If you want to change the colour of the button:
   1. Press **Colour**.

      The colour presets are displayed.



Red: 179
Green: 26
Blue: 26
HTML: #b31a1a

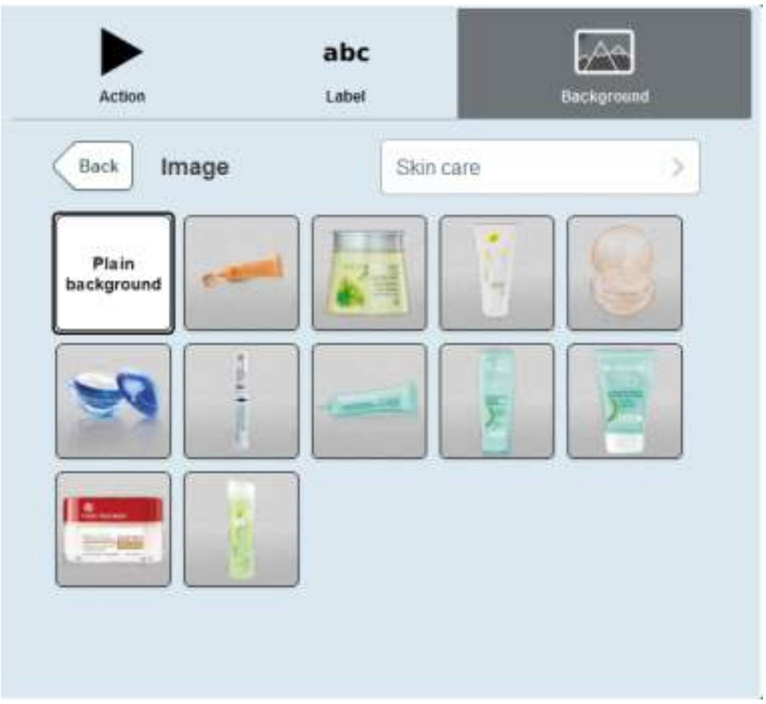
   2. Select the colour preset you want to use as the button's colour.
   3. If you want to customise the button's colour, use the fields and sliders below. See *Creating one-shot button colour presets* on page 110.

   4. Press Back.

      The button colour is changed.

6. If you want to set an image to use as the button's background:
   1. Press **Image**.

      The available images are displayed.



   2. Select the image you want to appear on the button.

> **Note:** Images are arranged into folders in the same manner they are stored on the base station. If the image you want is not displayed, press the folder name to select a different image folder.

7. Press Back.

   The button image is changed.

8. Press anywhere on the Transaction screen to close the One-shot button screen.
9. Press Save.

   The one-shot buttons are saved.

Creating a one-shot button to open a one-shot button page

You can create a one-shot button to display a page of one-shot buttons. You can use this to easily organise your one-shot buttons if you need more space than the Transaction screen allows. For example, you may create a page of:

- impulse purchase items
- items that do not have printed barcodes
- table configurations.

One-shot button pages are stored separately to the one-shot buttons that open them. You can have several one-shot buttons that open the same one-shot button page. See *Setting up one-shot pages* on page 131

To create a one-shot button to open a one-shot button page:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

2. Press **Edit one-shot buttons**.

   One-shot button editing is enabled on the Transaction screen.

> **Note:** You cannot use one-shot buttons while editing is enabled, with the exception of buttons that open one-shot button pages. Save or cancel your changes if you want to use the buttons.

3. Press and hold where you want the one-shot button to be placed.

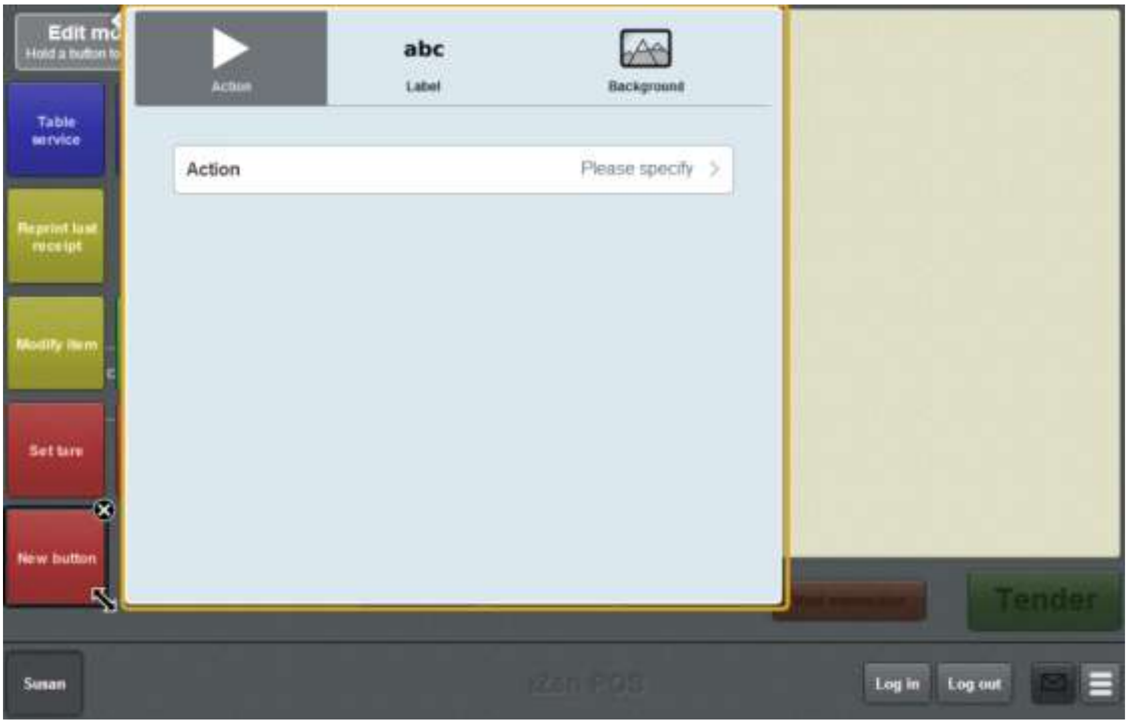
   The One-shot button screen is displayed.

> **Note**: The Point of Sale displays the most recently-viewed tab of the One-shot button screen. This is useful if you want to quickly edit the same attributes of multiple buttons.

> **Tip**: If you have already created a one-shot button, the Point of Sale matches the background and font of the closest one-shot button when creating a new button. If you need to create several buttons that look alike, create them near each other and then drag them to where you want them to appear.

4. Press ▶.

   The Action tab of the One-shot button screen is displayed.

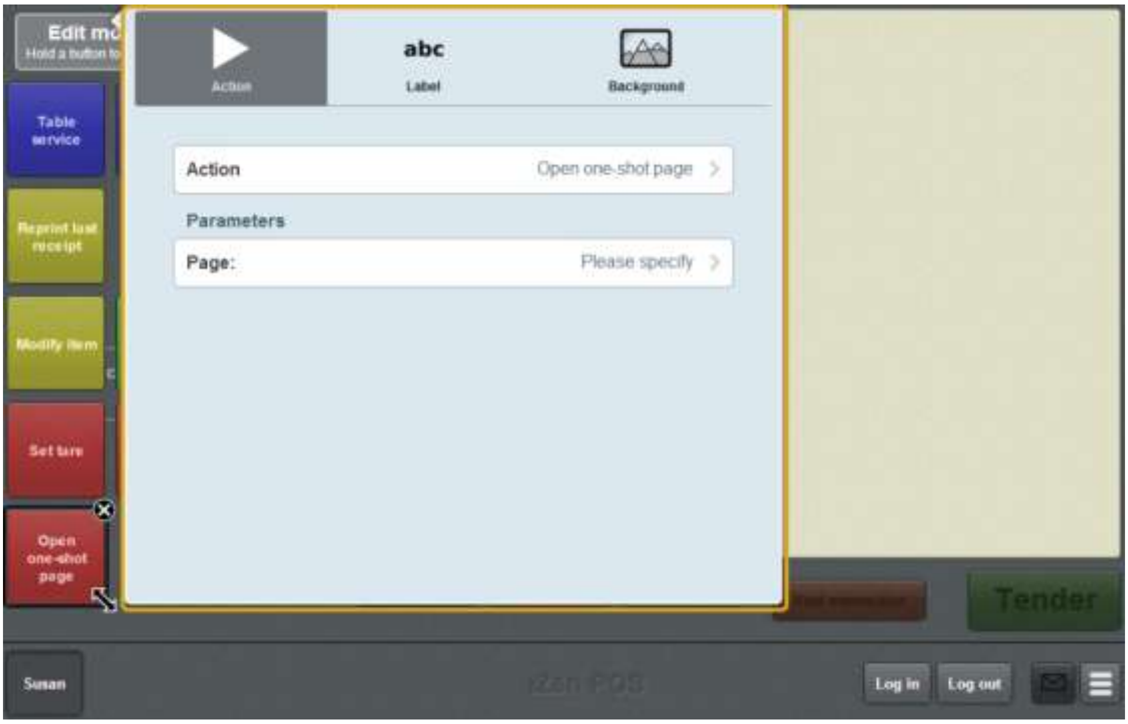


5. Press **Action**.

   The list of available one-shot button actions is displayed.

6. Press **Open one-shot page**.

   The button is configured to open a one-shot button page.



Action Open one-shot page

Parameters

Page: Please specify

7. Press **Page**.

   The list of available one-shot button pages is displayed.

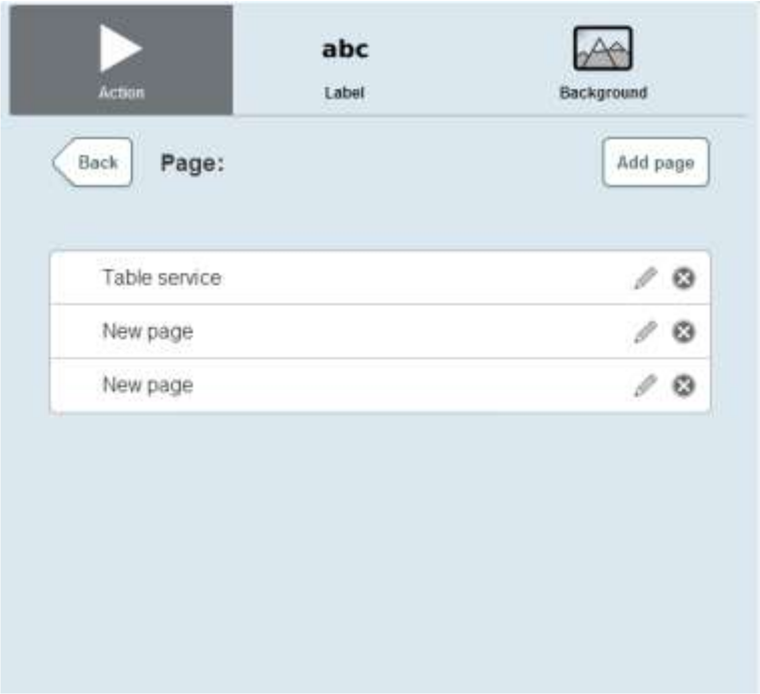


Table service

New page

New page

8. Either:
   - Select the page you want the one-shot button to open.
   - Press Add page to create a new page to open and label it.

Tip: You can add buttons to the new page after it has been created.

9. If you want to change the appearance or text of the button's label, see *Changing the appearance and text of a one-shot button label* on page 119.
10. If you want to change the background colour or image of the button, see *Changing the background colour or image of a one-shot button* on page 122.

Note: You can configure the terminal to require a supervisor's authorisation to perform this button's function. See *Terminal setup screen - Security tab* on page 50.

11. Press anywhere on the Transaction screen to close the One-shot button screen.
12. Press Save.

    The one-shot buttons are saved.

Setting up one-shot pages

Create one-shot pages to hold one or more one-shot buttons. Pages are accessed through a one-shot button on either:

- the Transaction screen
- another one-shot button page.

See *Creating a one-shot button to open a one-shot button page* on page 126.

To create a one-shot button page:

3. Press **Edit one-shot buttons**.

   One-shot button editing is enabled on the Transaction screen.

> **Note:** You cannot use one-shot buttons while editing is enabled, with the exception of buttons that open one-shot button pages. Save or cancel your changes if you want to use the buttons.

4. Press and hold where you want the one-shot button to be placed.

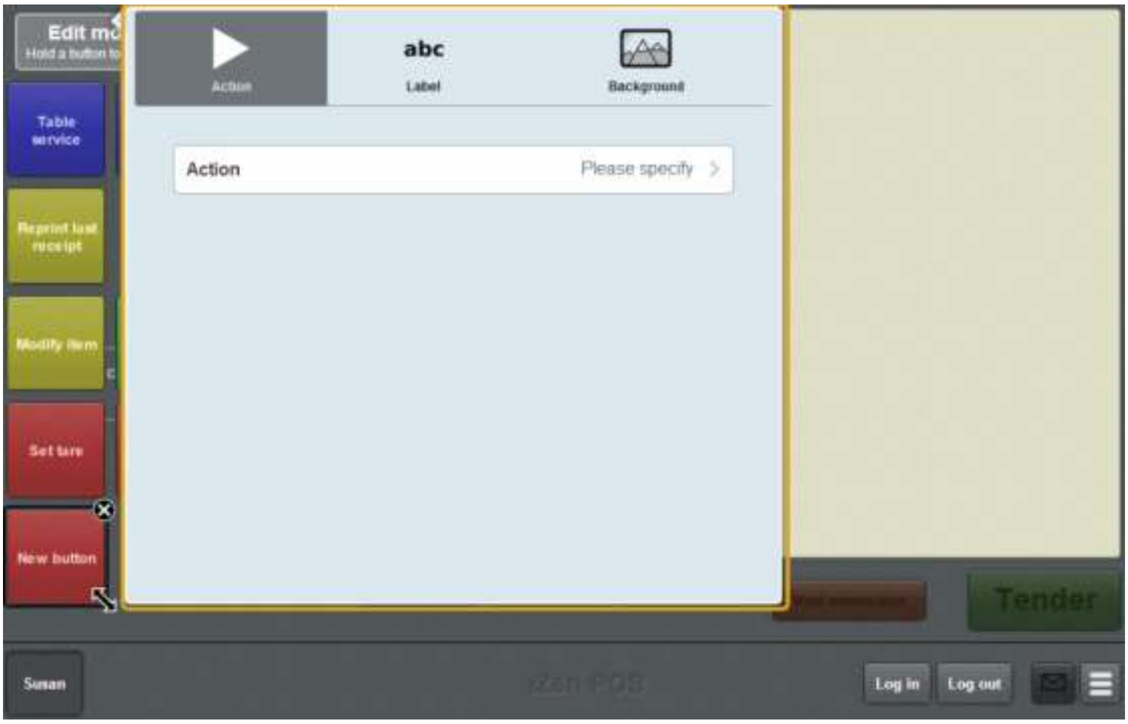
   The One-shot button screen is displayed.

> **Note**: The Point of Sale displays the most recently-viewed tab of the One-shot button screen. This is useful if you want to quickly edit the same attributes of multiple buttons.

> **Tip**: If you have already created a one-shot button, the Point of Sale matches the background and font of the closest one-shot button when creating a new button. If you need to create several buttons that look alike, create them near each other and then drag them to where you want them to appear.

5. Press ▶.

   The Action tab of the One-shot button screen is displayed.

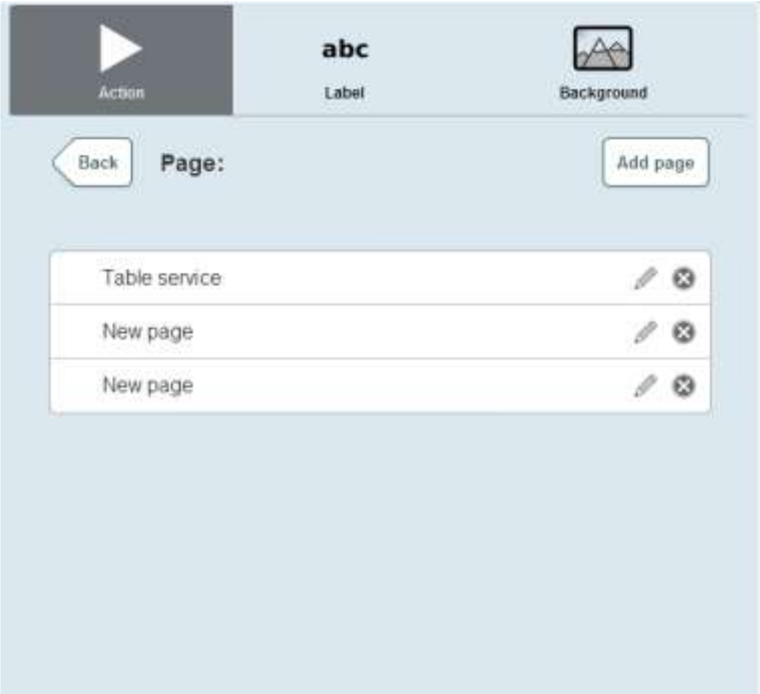


Action Please specify

6. Press **Action**.

   The list of available one-shot button actions is displayed.

7. Press **Open one-shot page**.
8. Press **Page**.
9. The list of available one-shot button pages is displayed.



10. Press Add page.

    A new page is added to the list.

11. Type the name of the page.

> **Note:** This name appears as the title of the one-shot button page.

12. Press the page you created.

    The button is configured to open the new one-shot button page.

13. Press anywhere on the Transaction screen to close the One-shot button screen.
14. Press the one-shot button you created.

    The one-shot button page is displayed.

15. Add any one-shot buttons you want to display on the page.

    See *Setting up one-shot buttons* on page 101.

> **Note:** You can edit the buttons on this page at any time by pressing the one-shot button to open the page when one-shot button editing is enabled.

16. Press anywhere on the Transaction screen to close the One-shot button screen.
17. Press Save.

    The one-shot buttons are saved.

Creating a one-shot button to edit one-shot buttons

You can create a one-shot button to enable editing of one-shot buttons.

> **Note:** You can still edit one-shot buttons without creating a one-shot button. See the instructions below.

To create a one-shot button to edit one-shot buttons:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

2. Press **Edit one-shot buttons**.

   One-shot button editing is enabled on the Transaction screen.

> **Note:** You cannot use one-shot buttons while editing is enabled, with the exception of buttons that open one-shot button pages. Save or cancel your changes if you want to use the buttons.

3. Press and hold where you want the one-shot button to be placed.

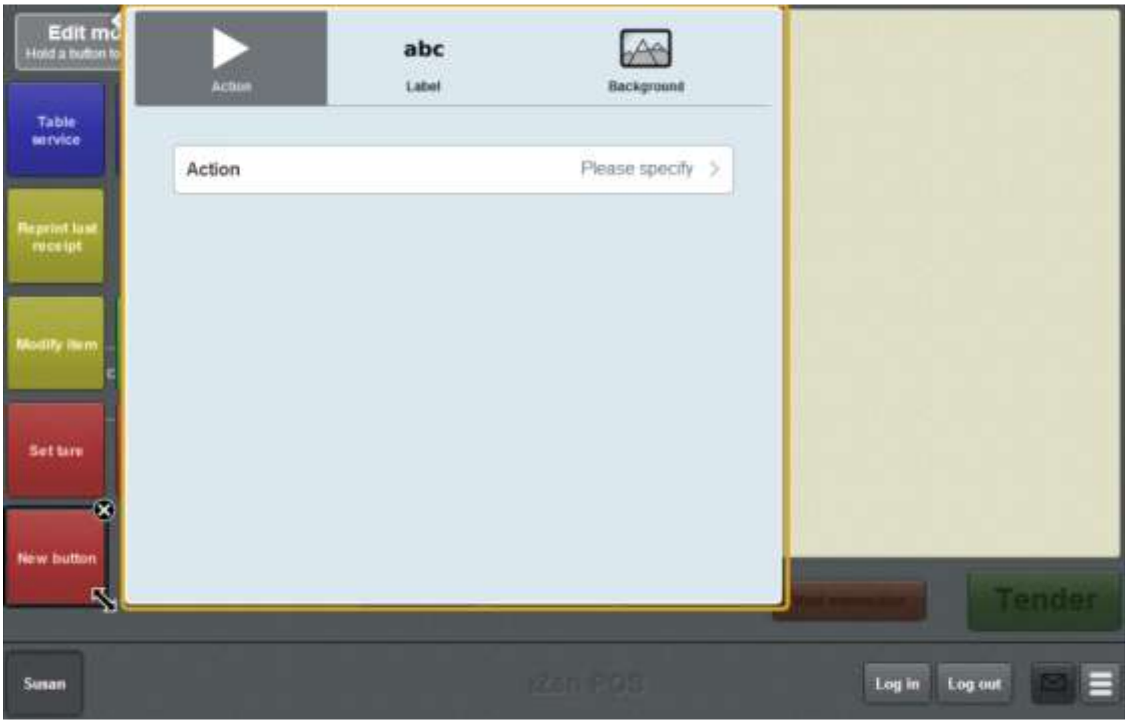
   The One-shot button screen is displayed.

> **Note**: The Point of Sale displays the most recently-viewed tab of the One-shot button screen. This is useful if you want to quickly edit the same attributes of multiple buttons.

> **Tip**: If you have already created a one-shot button, the Point of Sale matches the background and font of the closest one-shot button when creating a new button. If you need to create several buttons that look alike, create them near each other and then drag them to where you want them to appear.

4. Press ▶.

   The Action tab of the One-shot button screen is displayed.



5. Press **Action**.

   The list of available one-shot button actions is displayed.

6. Press **Edit one-shot buttons**.
   The button is configured to enable editing of one-shot buttons.
7. If you want to change the appearance or text of the button's label, see *Changing the appearance and text of a one-shot button label* on page 119.
8. If you want to change the background colour or image of the button, see *Changing the background colour or image of a one-shot button* on page 122.

> **Note:** You can configure the terminal to require a supervisor's authorisation to perform this button's function. See *Terminal setup screen - Security tab* on page 50.

9. Press anywhere on the Transaction screen to close the One-shot button screen.
10. Press Save.

    The one-shot buttons are saved.

Creating a one-shot button to open the Terminal setup screen

You can create a one-shot button to open the Terminal setup screen.

> **Note:** You can still open the Terminal setup screen without creating a one-shot button. See *Terminal setup screen - Registration tab* on page 44.

To create a one-shot button to open the Terminal setup screen:

1. From the Transaction screen, press .

   The Point of Sale menu is displayed.

2. Press **Edit one-shot buttons**.

   One-shot button editing is enabled on the Transaction screen.

> **Note:** You cannot use one-shot buttons while editing is enabled, with the exception of buttons that open one-shot button pages. Save or cancel your changes if you want to use the buttons.

3. Press and hold where you want the one-shot button to be placed.

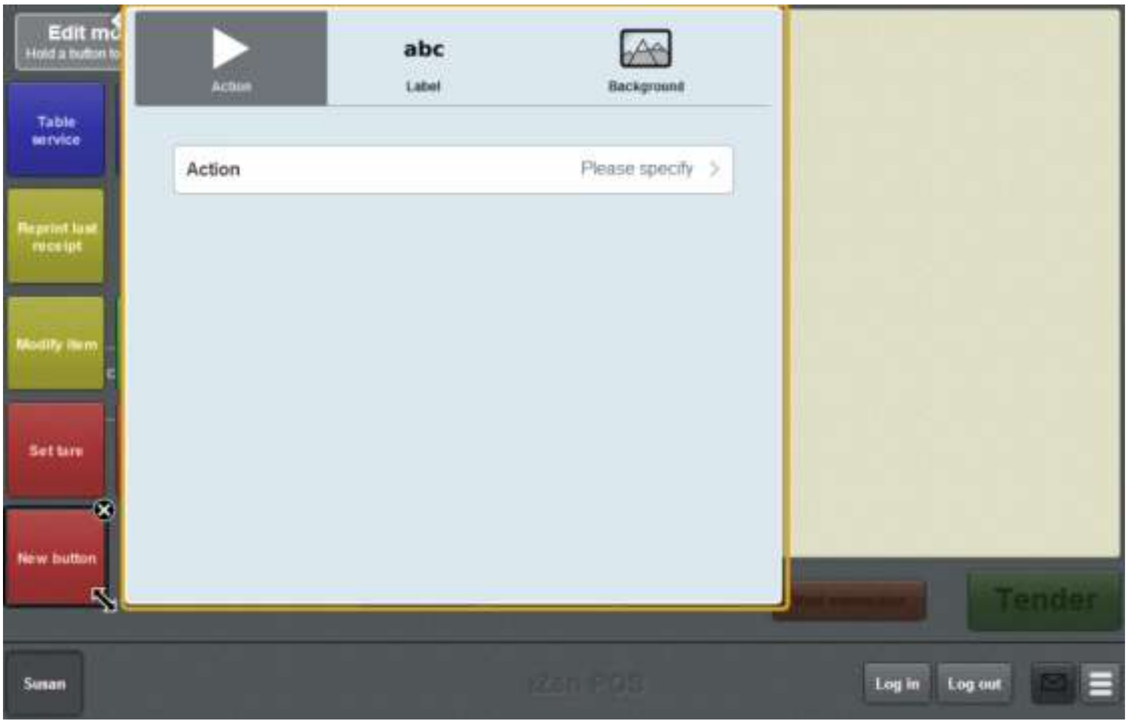
   The One-shot button screen is displayed.

> **Note**: The Point of Sale displays the most recently-viewed tab of the One-shot button screen. This is useful if you want to quickly edit the same attributes of multiple buttons.

> **Tip**: If you have already created a one-shot button, the Point of Sale matches the background and font of the closest one-shot button when creating a new button. If you need to create several buttons that look alike, create them near each other and then drag them to where you want them to appear.

4. Press ▶.

   The Action tab of the One-shot button screen is displayed.



5. Press **Action**.

   The list of available one-shot button actions is displayed.

6. Press **Open setup**.

   The button is configured to open the Terminal setup screen.

7. If you want to change the appearance or text of the button's label, see *Changing the appearance and text of a one-shot button label* on page 119.

8. If you want to change the background colour or image of the button, see *Changing the background colour or image of a one-shot button* on page 122.

> **Note:** You can configure the terminal to require a supervisor's authorisation to perform this button's function. See *Terminal setup screen - Security tab* on page 50.

9. Press anywhere on the Transaction screen to close the One-shot button screen.
10. Press Save.

    The one-shot buttons are saved.

Creating a one-shot button for advances

You can create a one-shot button to open the Advance screen and record advances.

> **Note:** You can record an advance without creating a one-shot button. See *Recording an advance* on page 355.

To create a one-shot button to record an advance:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

2. Press **Edit one-shot buttons**.

   One-shot button editing is enabled on the Transaction screen.

Note: You cannot use one-shot buttons while editing is enabled, with the exception of buttons that open one-shot button pages. Save or cancel your changes if you want to use the buttons.

3. Press and hold where you want the one-shot button to be placed.

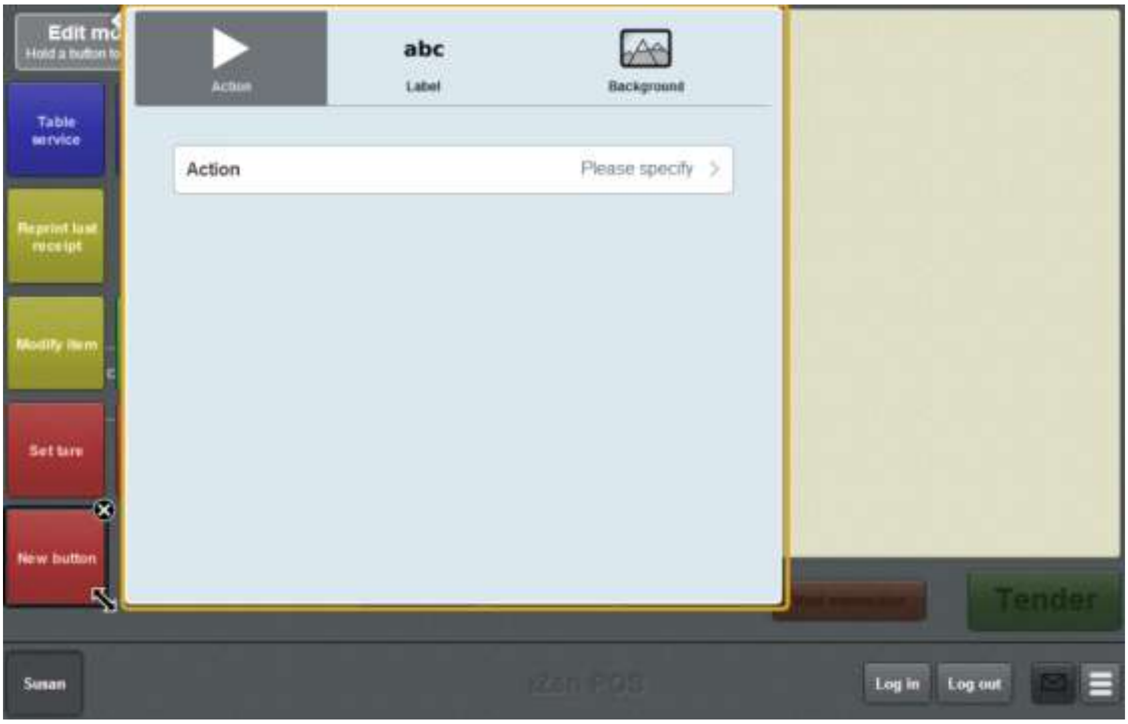
   The One-shot button screen is displayed.

Note: The Point of Sale displays the most recently-viewed tab of the One-shot button screen. This is useful if you want to quickly edit the same attributes of multiple buttons.

Tip: If you have already created a one-shot button, the Point of Sale matches the background and font of the closest one-shot button when creating a new button. If you need to create several buttons that look alike, create them near each other and then drag them to where you want them to appear.

4. Press ▶.

   The Action tab of the One-shot button screen is displayed.



5. Press **Action**.

   The list of available one-shot button actions is displayed.

6. Press **Advance**.

   The button is configured to open the Advance screen.

7. If you want to change the appearance or text of the button's label, see *Changing the appearance and text of a one-shot button label* on page 119.

8. If you want to change the background colour or image of the button, see *Changing the background colour or image of a one-shot button* on page 122.

Note: You can configure the terminal to require a supervisor's authorisation to perform this button's function. See *Terminal setup screen - Security tab* on page 50.

9. Press anywhere on the Transaction screen to close the One-shot button screen.

10. Press Save.

    The one-shot buttons are saved.

Creating a one-shot button for debtor enquiries

You can create a one-shot button to open the Find debtor screen and search for a debtor's details or add them to a transaction.

To create a one-shot button to find a debtor:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

2. Press **Edit one-shot buttons**.

   One-shot button editing is enabled on the Transaction screen.

Note: You cannot use one-shot buttons while editing is enabled, with the exception of buttons that open one-shot button pages. Save or cancel your changes if you want to use the buttons.

3. Press and hold where you want the one-shot button to be placed.

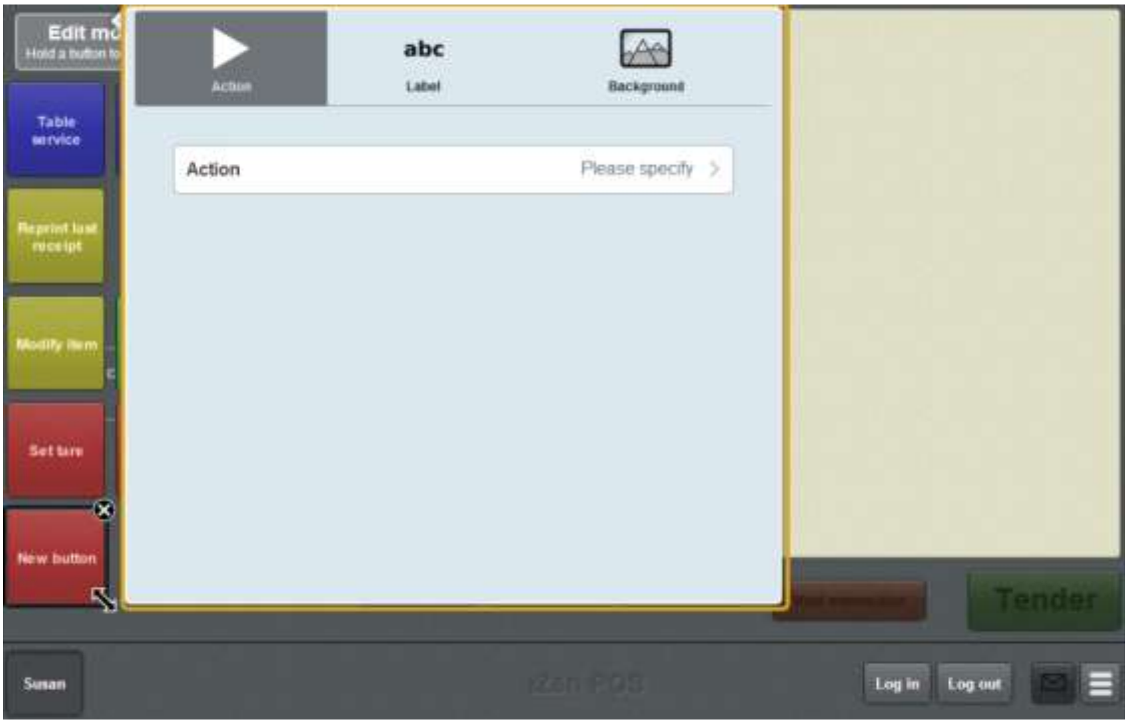
   The One-shot button screen is displayed.

Note: The Point of Sale displays the most recently-viewed tab of the One-shot button screen. This is useful if you want to quickly edit the same attributes of multiple buttons.

Tip: If you have already created a one-shot button, the Point of Sale matches the background and font of the closest one-shot button when creating a new button. If you need to create several buttons that look alike, create them near each other and then drag them to where you want them to appear.

4. Press ▶.

   The Action tab of the One-shot button screen is displayed.



5. Press **Action**.

   The list of available one-shot button actions is displayed.

6. Press **Debtor enquiry**.

   The button is configured to open the Find debtor screen.

7. If you want to change the appearance or text of the button's label, see *Changing the appearance and text of a one-shot button label* on page 119.

8. If you want to change the background colour or image of the button, see *Changing the background colour or image of a one-shot button* on page 122.

Note: You can configure the terminal to require a supervisor's authorisation to perform this button's function. See *Terminal setup screen - Security tab* on page 50.

9. Press anywhere on the Transaction screen to close the One-shot button screen.
10. Press Save.

    The one-shot buttons are saved.

Creating a one-shot button to create orders

You can create a one-shot button to create a customer order on the Point of Sale.

> **Note:** You can configure the terminal to require a supervisor's authorisation to perform this button's function. See *Terminal setup screen - Security tab* on page 50.

To create a one-shot button to create a customer order:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

2. Press **Edit one-shot buttons**.

   One-shot button editing is enabled on the Transaction screen.

Note: You cannot use one-shot buttons while editing is enabled, with the exception of buttons that open one-shot button pages. Save or cancel your changes if you want to use the buttons.

3. Press and hold where you want the one-shot button to be placed.

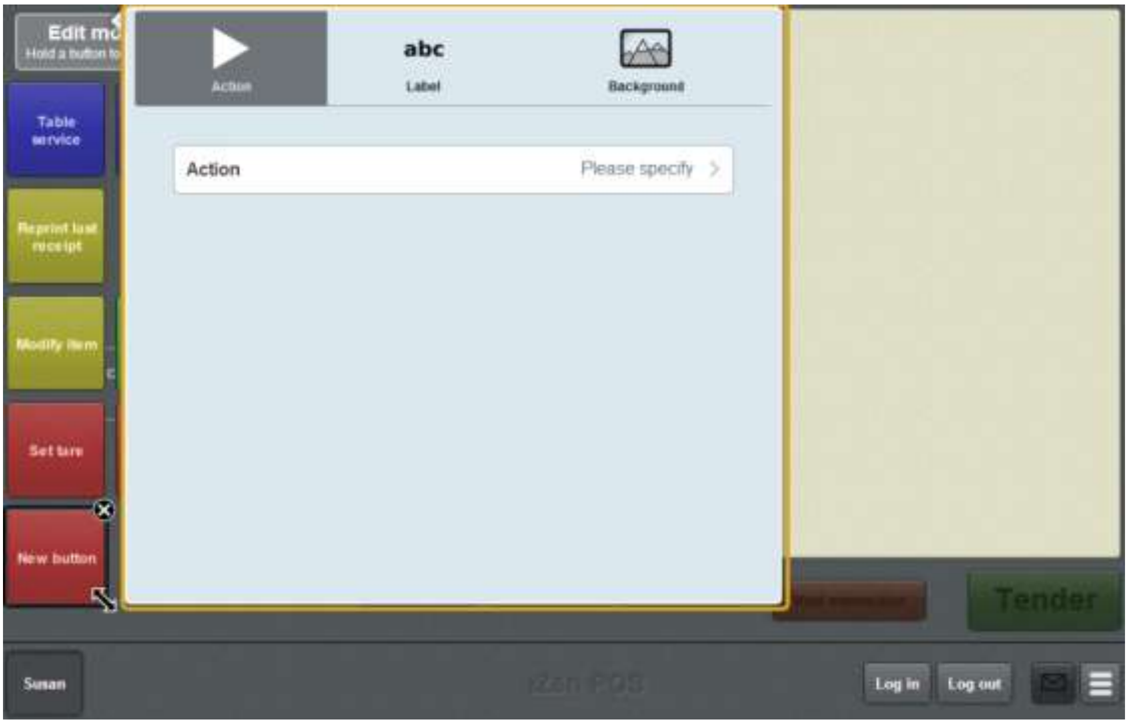
   The One-shot button screen is displayed.

Note: The Point of Sale displays the most recently-viewed tab of the One-shot button screen. This is useful if you want to quickly edit the same attributes of multiple buttons.

Tip: If you have already created a one-shot button, the Point of Sale matches the background and font of the closest one-shot button when creating a new button. If you need to create several buttons that look alike, create them near each other and then drag them to where you want them to appear.

4. Press ▶.

   The Action tab of the One-shot button screen is displayed.



5. Press **Action**.

   The list of available one-shot button actions is displayed.

6. Press **Create order**.

   The button is configured to create a customer order.

7. If you want to change the appearance or text of the button's label, see *Changing the appearance and text of a one-shot button label* on page 119.

8. If you want to change the background colour or image of the button, see *Changing the background colour or image of a one-shot button* on page 122.

> **Note:** You can configure the terminal to require a supervisor's authorisation to perform this button's function. See *Terminal setup screen - Security tab* on page 50.

9. Press anywhere on the Transaction screen to close the One-shot button screen.
10. Press Save.

    The one-shot buttons are saved.

Creating a one-shot button to create laybys

You can create a one-shot button to create a customer layby on the Point of Sale.

> **Note:** You can configure the terminal to require a supervisor's authorisation to perform this button's function. See *Terminal setup screen - Security tab* on page 50.

To create a one-shot button to create a layby:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

2. Press **Edit one-shot buttons**.

   One-shot button editing is enabled on the Transaction screen.

Note: You cannot use one-shot buttons while editing is enabled, with the exception of buttons that open one-shot button pages. Save or cancel your changes if you want to use the buttons.

3. Press and hold where you want the one-shot button to be placed.

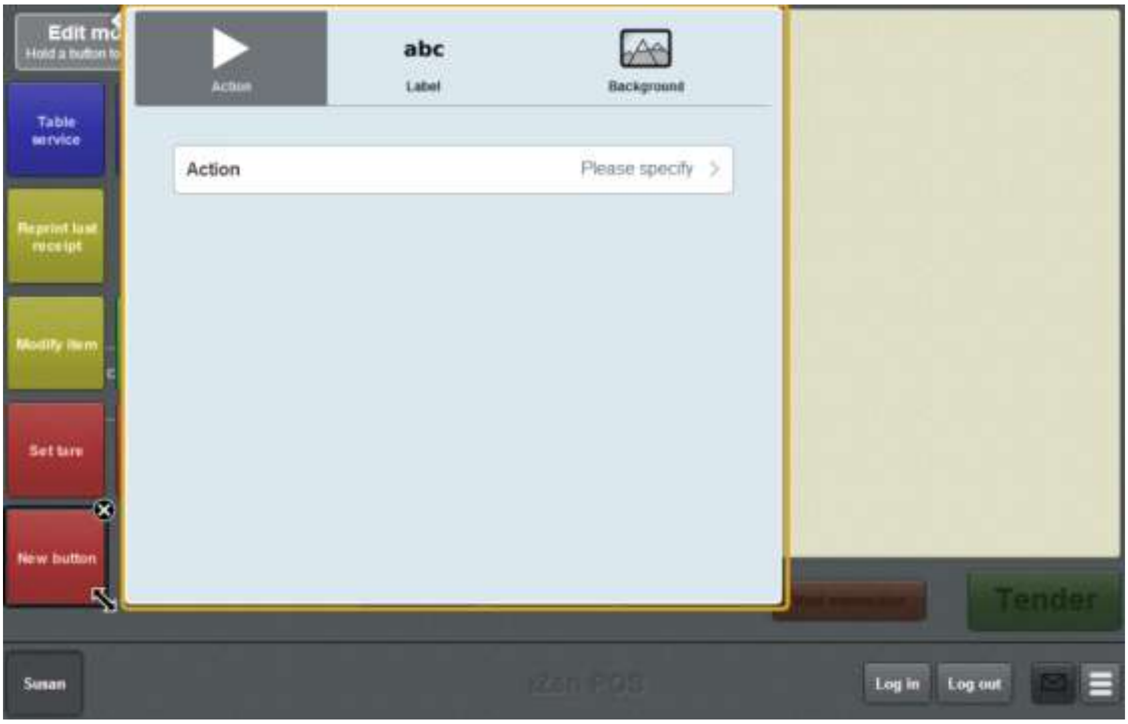
   The One-shot button screen is displayed.

Note: The Point of Sale displays the most recently-viewed tab of the One-shot button screen. This is useful if you want to quickly edit the same attributes of multiple buttons.

Tip: If you have already created a one-shot button, the Point of Sale matches the background and font of the closest one-shot button when creating a new button. If you need to create several buttons that look alike, create them near each other and then drag them to where you want them to appear.

4. Press ▶ .

   The Action tab of the One-shot button screen is displayed.



5. Press **Action**.

   The list of available one-shot button actions is displayed.

6. Press **Create layby**.

   The button is configured to create a layby.

7. If you want to change the appearance or text of the button's label, see *Changing the appearance and text of a one-shot button label* on page 119.

8. If you want to change the background colour or image of the button, see *Changing the background colour or image of a one-shot button* on page 122.

> **Note:** You can configure the terminal to require a supervisor's authorisation to perform this button's function. See *Terminal setup screen - Security tab* on page 50.

9. Press anywhere on the Transaction screen to close the One-shot button screen.
10. Press Save.

    The one-shot buttons are saved.

Creating a one-shot button to sign a customer in

You can create a one-shot button to sign a customer in after scanning their loyalty card. This registers a customer's attendance, for example at a workshop, gym or similar organisation.

See *Signing customers in* on page 524.

To create a one-shot button to sign a customer in:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

2. Press **Edit one-shot buttons**.

   One-shot button editing is enabled on the Transaction screen.

Note: You cannot use one-shot buttons while editing is enabled, with the exception of buttons that open one-shot button pages. Save or cancel your changes if you want to use the buttons.

3. Press and hold where you want the one-shot button to be placed.

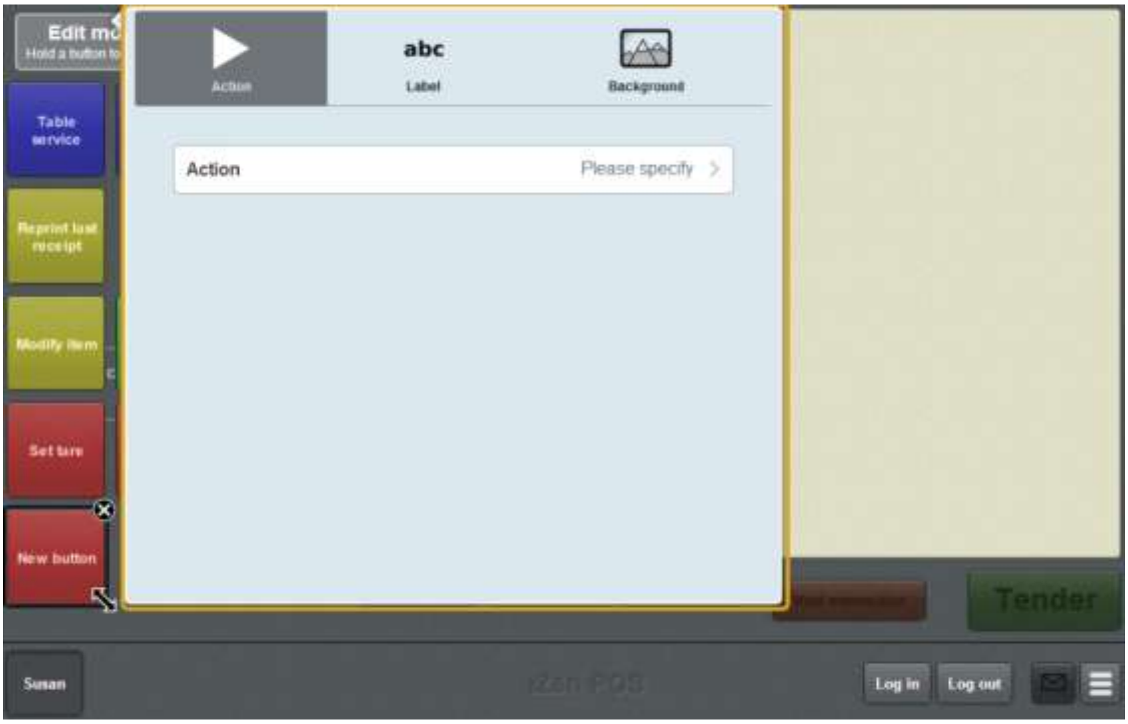
   The One-shot button screen is displayed.

Note: The Point of Sale displays the most recently-viewed tab of the One-shot button screen. This is useful if you want to quickly edit the same attributes of multiple buttons.

Tip: If you have already created a one-shot button, the Point of Sale matches the background and font of the closest one-shot button when creating a new button. If you need to create several buttons that look alike, create them near each other and then drag them to where you want them to appear.

4. Press ▶.

   The Action tab of the One-shot button screen is displayed.



5. Press **Action**.

   The list of available one-shot button actions is displayed.

6. Press **Customer sign in**.

   The button is configured to sign the selected customer in.

7. If you want to change the appearance or text of the button's label, see *Changing the appearance and text of a one-shot button label* on page 119.

8. If you want to change the background colour or image of the button, see *Changing the background colour or image of a one-shot button* on page 122.

Note: You can configure the terminal to require a supervisor's authorisation to perform this button's function. See *Terminal setup screen - Security tab* on page 50.

9. Press anywhere on the Transaction screen to close the One-shot button screen.

10. Press Save.

    The one-shot buttons are saved.

Creating a one-shot button to sign a customer out

You can create a one-shot button to sign a customer out after scanning their loyalty card. This registers the end of a customer's attendance, for example at a workshop, gym or similar organisation.

See *Signing customers out* on page 526.

To create a one-shot button to sign a customer out:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

2. Press **Edit one-shot buttons**.

   One-shot button editing is enabled on the Transaction screen.

Note: You cannot use one-shot buttons while editing is enabled, with the exception of buttons that open one-shot button pages. Save or cancel your changes if you want to use the buttons.

3. Press and hold where you want the one-shot button to be placed.

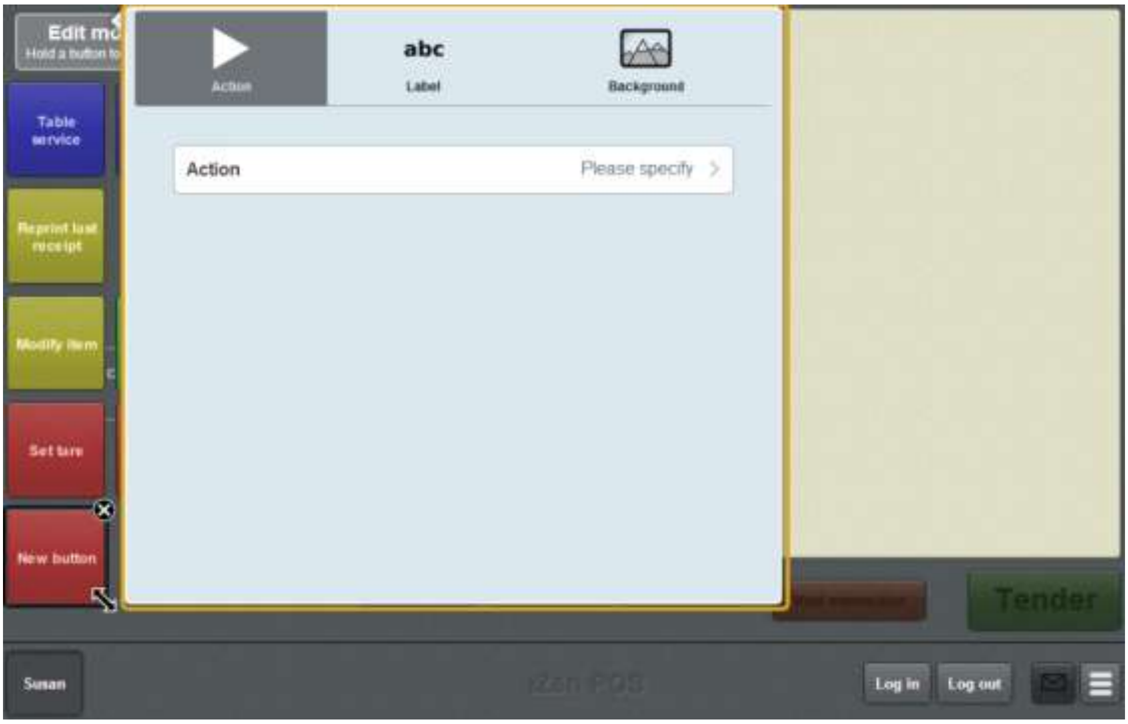
   The One-shot button screen is displayed.

Note: The Point of Sale displays the most recently-viewed tab of the One-shot button screen. This is useful if you want to quickly edit the same attributes of multiple buttons.

Tip: If you have already created a one-shot button, the Point of Sale matches the background and font of the closest one-shot button when creating a new button. If you need to create several buttons that look alike, create them near each other and then drag them to where you want them to appear.

4. Press ▶.

   The Action tab of the One-shot button screen is displayed.



5. Press **Action**.

   The list of available one-shot button actions is displayed.

6. Press **Customer sign out**.

   The button is configured to sign a customer out.

7. If you want to change the appearance or text of the button's label, see *Changing the appearance and text of a one-shot button label* on page 119.

8. If you want to change the background colour or image of the button, see *Changing the background colour or image of a one-shot button* on page 122.

Note: You can configure the terminal to require a supervisor's authorisation to perform this button's function. See *Terminal setup screen - Security tab* on page 50.

9. Press anywhere on the Transaction screen to close the One-shot button screen.
10. Press Save.

    The one-shot buttons are saved.

Creating a one-shot button for debtor payments

You can create one-shot buttons to add a debtor payment to a transaction.

See *Adding a debtor payment to a transaction* on page 593.

To create a one-shot button for debtor payments:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

2. Press **Edit one-shot buttons**.

   One-shot button editing is enabled on the Transaction screen.

> **Note:** You cannot use one-shot buttons while editing is enabled, with the exception of buttons that open one-shot button pages. Save or cancel your changes if you want to use the buttons.

3. Press and hold where you want the one-shot button to be placed.

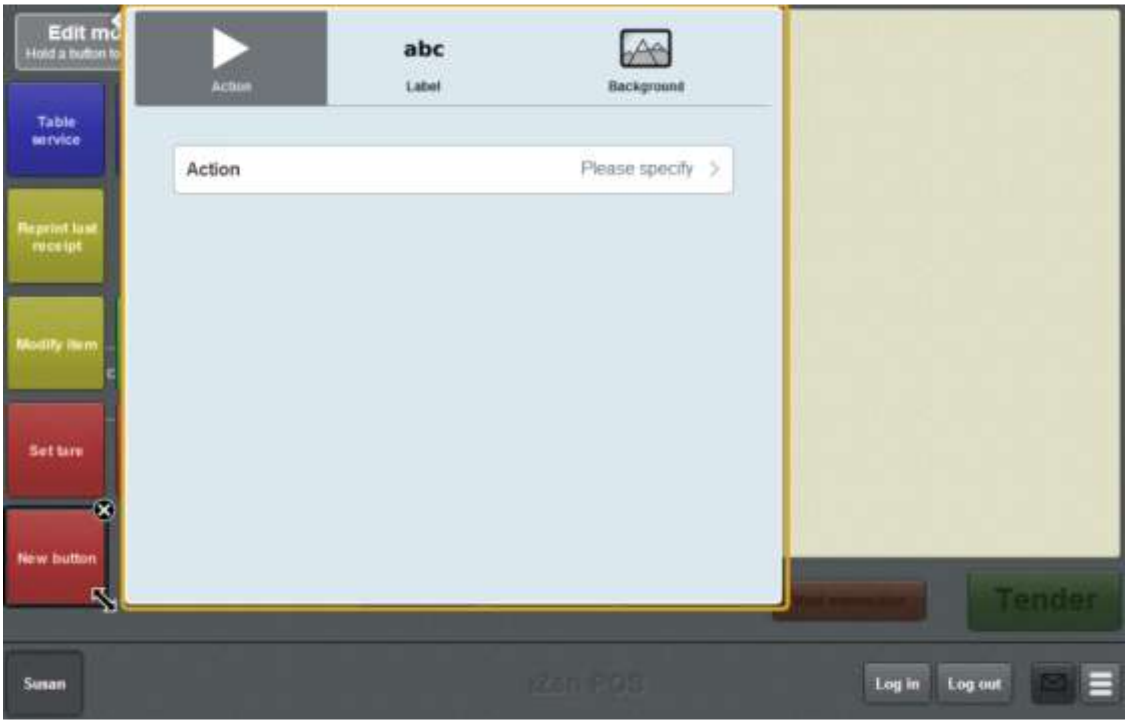
   The One-shot button screen is displayed.

> **Note**: The Point of Sale displays the most recently-viewed tab of the One-shot button screen. This is useful if you want to quickly edit the same attributes of multiple buttons.

> **Tip**: If you have already created a one-shot button, the Point of Sale matches the background and font of the closest one-shot button when creating a new button. If you need to create several buttons that look alike, create them near each other and then drag them to where you want them to appear.

4. Press ▶.

   The Action tab of the One-shot button screen is displayed.



5. Press **Action**.

   The list of available one-shot button actions is displayed.

6. Press **Debtor payment**.

   The button is configured to add a debtor payment to the transaction.

7. If you want to change the appearance or text of the button's label, see *Changing the appearance and text of a one-shot button label* on page 119.

8. If you want to change the background colour or image of the button, see *Changing the background colour or image of a one-shot button* on page 122.

Note: You can configure the terminal to require a supervisor's authorisation to perform this button's function. See *Terminal setup screen - Security tab* on page 50.

9. Press anywhere on the Transaction screen to close the One-shot button screen.
10. Press Save.

    The one-shot buttons are saved.

Creating a one-shot button to find laybys

You can configure a one-shot button to open the Find customer screen and find a customer's laybys.

See *Finding an layby* on page 563.

To create a one-shot button to find customer laybys:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

2. Press **Edit one-shot buttons**.

   One-shot button editing is enabled on the Transaction screen.

Note: You cannot use one-shot buttons while editing is enabled, with the exception of buttons that open one-shot button pages. Save or cancel your changes if you want to use the buttons.

3. Press and hold where you want the one-shot button to be placed.

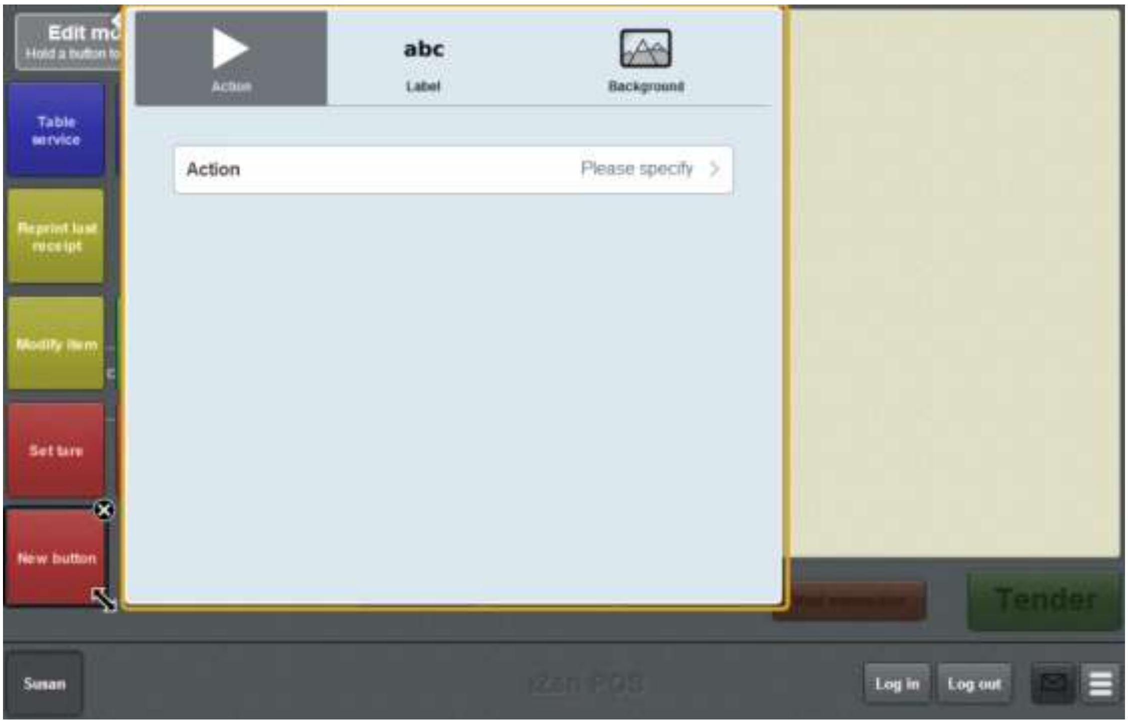
   The One-shot button screen is displayed.

Note: The Point of Sale displays the most recently-viewed tab of the One-shot button screen. This is useful if you want to quickly edit the same attributes of multiple buttons.

Tip: If you have already created a one-shot button, the Point of Sale matches the background and font of the closest one-shot button when creating a new button. If you need to create several buttons that look alike, create them near each other and then drag them to where you want them to appear.

4. Press ▶.

   The Action tab of the One-shot button screen is displayed.



5. Press **Action**.

   The list of available one-shot button actions is displayed.

6. Press **Find layby**.

   The button is configured to open the Find customer screen to retrieve a customer layby.

7. If you want to change the appearance or text of the button's label, see *Changing the appearance and text of a one-shot button label* on page 119.

8. If you want to change the background colour or image of the button, see *Changing the background colour or image of a one-shot button* on page 122.

> **Note:** You can configure the terminal to require a supervisor's authorisation to perform this button's function. See *Terminal setup screen - Security tab* on page 50.

9. Press anywhere on the Transaction screen to close the One-shot button screen.
10. Press Save.

    The one-shot buttons are saved.

Creating a one-shot button to find loyalty cards

You can create a one-shot button to open the Find loyalty card screen to search for loyalty cards by name.

To create a one-shot button to find loyalty cards:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

2. Press **Edit one-shot buttons**.

   One-shot button editing is enabled on the Transaction screen.

Note: You cannot use one-shot buttons while editing is enabled, with the exception of buttons that open one-shot button pages. Save or cancel your changes if you want to use the buttons.

3. Press and hold where you want the one-shot button to be placed.

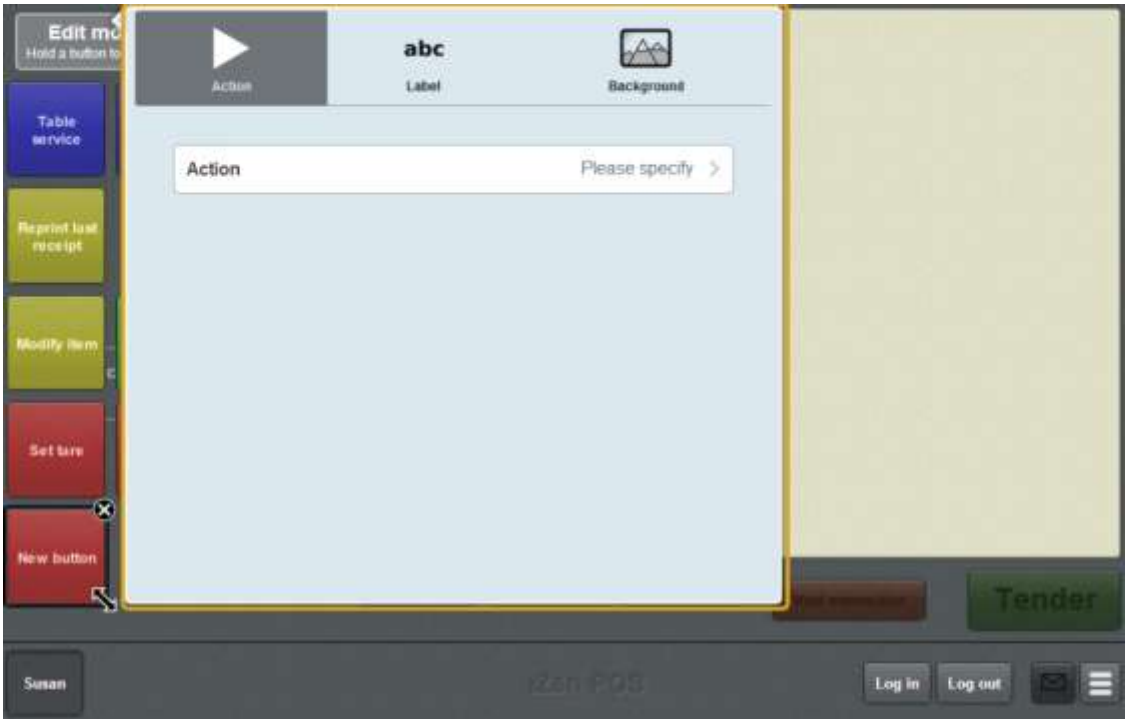
   The One-shot button screen is displayed.

Note: The Point of Sale displays the most recently-viewed tab of the One-shot button screen. This is useful if you want to quickly edit the same attributes of multiple buttons.

Tip: If you have already created a one-shot button, the Point of Sale matches the background and font of the closest one-shot button when creating a new button. If you need to create several buttons that look alike, create them near each other and then drag them to where you want them to appear.

4. Press ▶.

   The Action tab of the One-shot button screen is displayed.



5. Press **Action**.

   The list of available one-shot button actions is displayed.

6. Press **Find loyalty card**.
   The button is configured to open the Find loyalty card screen.
7. If you want to change the appearance or text of the button's label, see *Changing the appearance and text of a one-shot button label* on page 119.
8. If you want to change the background colour or image of the button, see *Changing the background colour or image of a one-shot button* on page 122.

> **Note:** You can configure the terminal to require a supervisor's authorisation to perform this button's function. See *Terminal setup screen - Security tab* on page 50.

9. Press anywhere on the Transaction screen to close the One-shot button screen.
10. Press Save.

    The one-shot buttons are saved.

Creating a one-shot button to find orders

You can configure a one-shot button to open the Find customer screen and find a customer's orders.

See *Finding an order* on page 547.

To create a one-shot button to find customer orders:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

2. Press **Edit one-shot buttons**.

   One-shot button editing is enabled on the Transaction screen.

Note: You cannot use one-shot buttons while editing is enabled, with the exception of buttons that open one-shot button pages. Save or cancel your changes if you want to use the buttons.

3. Press and hold where you want the one-shot button to be placed.

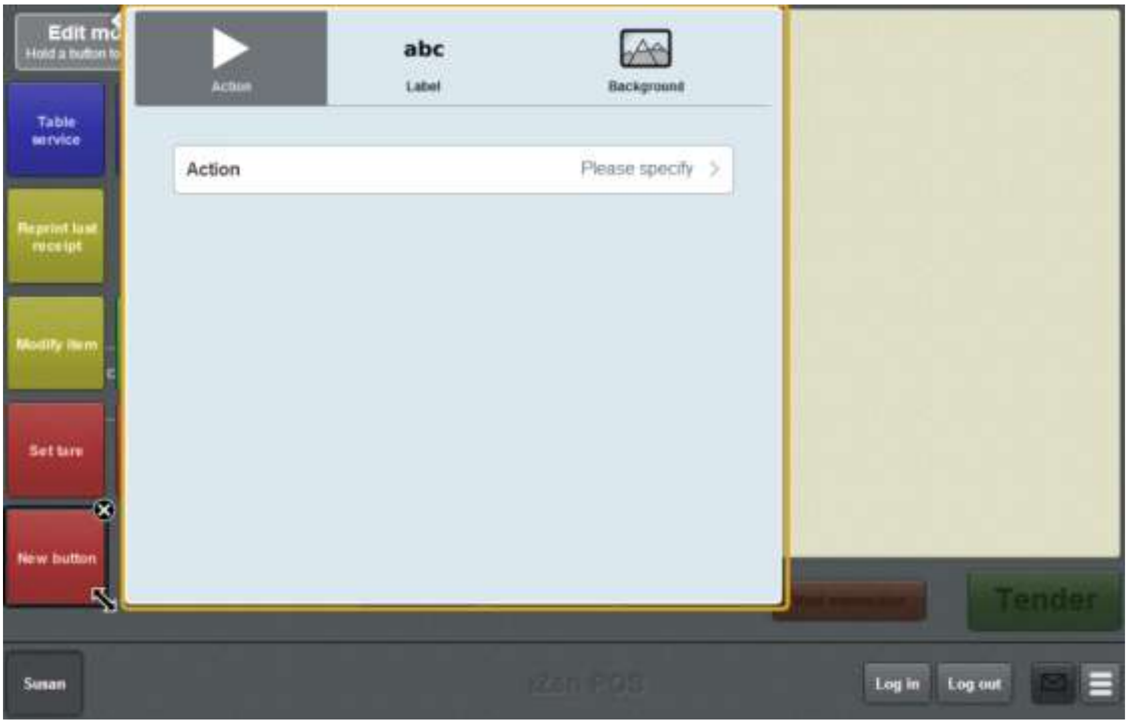
   The One-shot button screen is displayed.

Note: The Point of Sale displays the most recently-viewed tab of the One-shot button screen. This is useful if you want to quickly edit the same attributes of multiple buttons.

Tip: If you have already created a one-shot button, the Point of Sale matches the background and font of the closest one-shot button when creating a new button. If you need to create several buttons that look alike, create them near each other and then drag them to where you want them to appear.

4. Press ▶ .

   The Action tab of the One-shot button screen is displayed.



5. Press **Action**.

   The list of available one-shot button actions is displayed.

6. Press **Find order**.

   The button is configured to open the Find customer screen to retrieve a customer order.

7. If you want to change the appearance or text of the button's label, see *Changing the appearance and text of a one-shot button label* on page 119.

8. If you want to change the background colour or image of the button, see *Changing the background colour or image of a one-shot button* on page 122.

> **Note:** You can configure the terminal to require a supervisor's authorisation to perform this button's function. See *Terminal setup screen - Security tab* on page 50.

9. Press anywhere on the Transaction screen to close the One-shot button screen.
10. Press Save.

    The one-shot buttons are saved.

Creating a one-shot button for handovers

You can create a one-shot button to open the Handover screen and record handovers.

> **Note:** You can record a handover without creating a one-shot button. See *Recording a handover* on page 357.

To create a one-shot button to record a handover:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

2. Press **Edit one-shot buttons**.

   One-shot button editing is enabled on the Transaction screen.

> **Note:** You cannot use one-shot buttons while editing is enabled, with the exception of buttons that open one-shot button pages. Save or cancel your changes if you want to use the buttons.

3. Press and hold where you want the one-shot button to be placed.

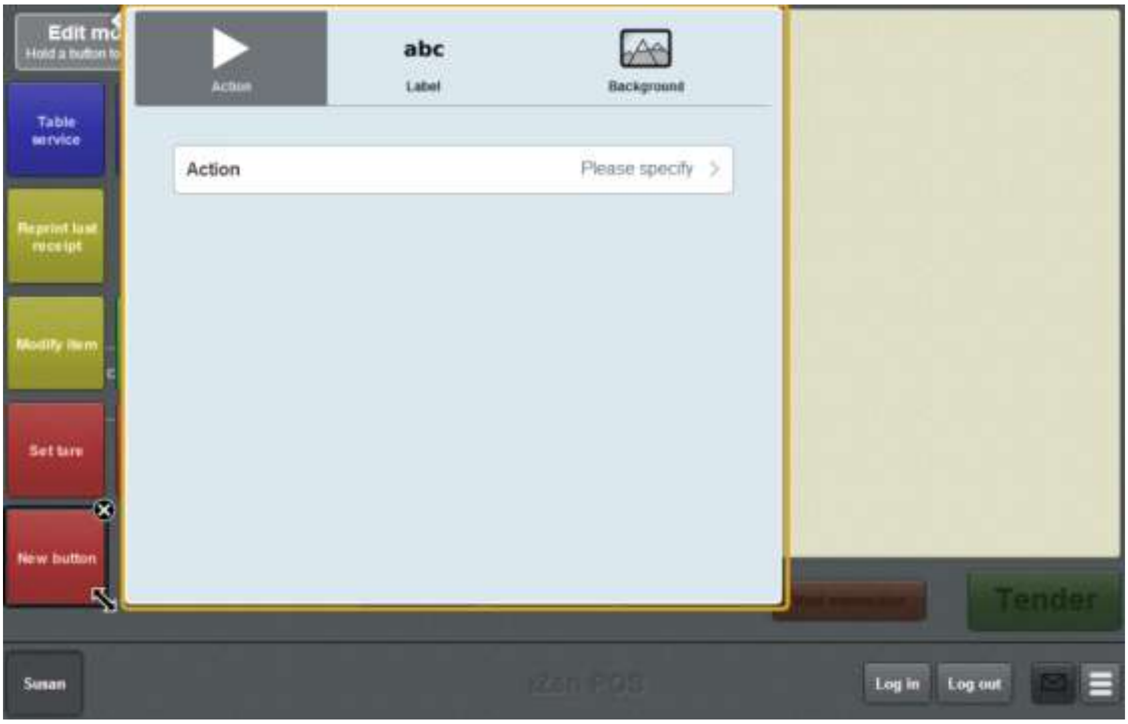
   The One-shot button screen is displayed.

> **Note**: The Point of Sale displays the most recently-viewed tab of the One-shot button screen. This is useful if you want to quickly edit the same attributes of multiple buttons.

> **Tip**: If you have already created a one-shot button, the Point of Sale matches the background and font of the closest one-shot button when creating a new button. If you need to create several buttons that look alike, create them near each other and then drag them to where you want them to appear.

4. Press ▶.

   The Action tab of the One-shot button screen is displayed.



5. Press **Action**.

   The list of available one-shot button actions is displayed.

6. Press **Handover**.

   The button is configured to open the Handover screen.

7. If you want to change the appearance or text of the button's label, see *Changing the appearance and text of a one-shot button label* on page 119.

8. If you want to change the background colour or image of the button, see *Changing the background colour or image of a one-shot button* on page 122.

Note: You can configure the terminal to require a supervisor's authorisation to perform this button's function. See *Terminal setup screen - Security tab* on page 50.

9. Press anywhere on the Transaction screen to close the One-shot button screen.
10. Press Save.

    The one-shot buttons are saved.

Creating a one-shot button to move a transaction to another table

You can create a one-shot button to select a new table for an active transaction. If the transaction is currently assigned to a table, it is moved to the new table you select. If the transaction is not currently assigned to a table, it is assigned to the table you select.

To use the button, you must have a transaction selected. Pressing this button opens the Select table screen to allow you to choose which table to move the transaction to.

> **Note:** You can only move a transaction to a free table. You cannot use this button to combine two tables.

To create a one-shot button to move a transaction to another table:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

2. Press **Edit one-shot buttons**.

   One-shot button editing is enabled on the Transaction screen.

Note: You cannot use one-shot buttons while editing is enabled, with the exception of buttons that open one-shot button pages. Save or cancel your changes if you want to use the buttons.

3. Press and hold where you want the one-shot button to be placed.

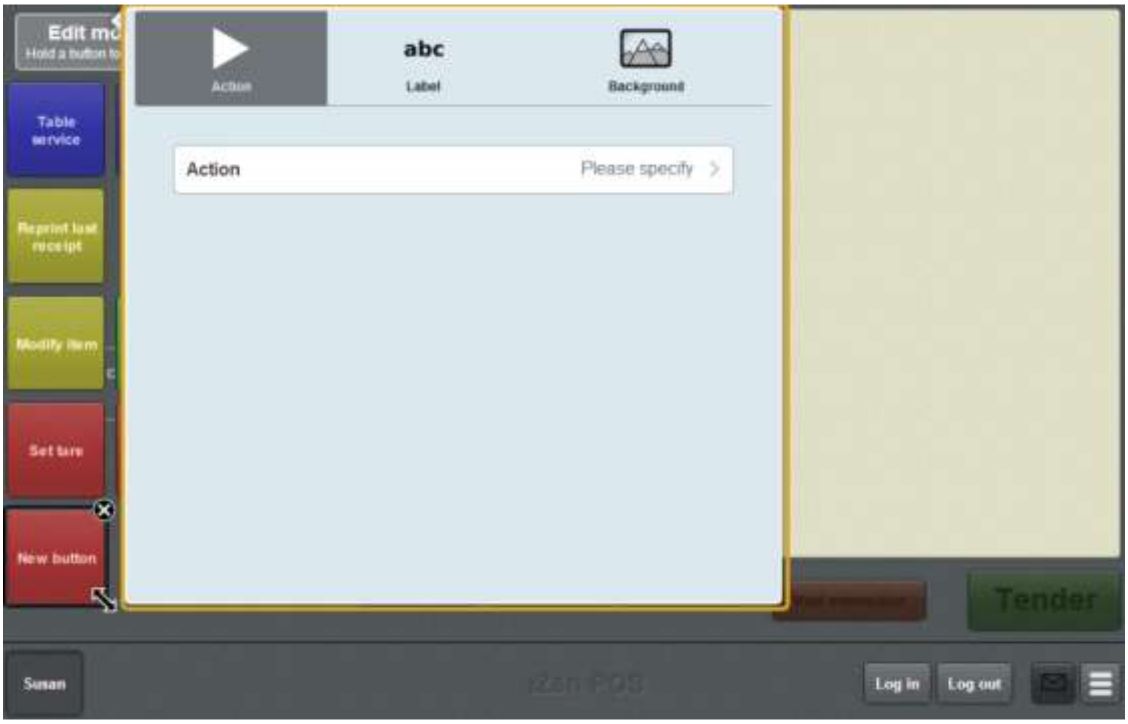
   The One-shot button screen is displayed.

Note: The Point of Sale displays the most recently-viewed tab of the One-shot button screen. This is useful if you want to quickly edit the same attributes of multiple buttons.

Tip: If you have already created a one-shot button, the Point of Sale matches the background and font of the closest one-shot button when creating a new button. If you need to create several buttons that look alike, create them near each other and then drag them to where you want them to appear.

4. Press ▶.

   The Action tab of the One-shot button screen is displayed.



5. Press **Action**.

   The list of available one-shot button actions is displayed.

6. Press **Move table**.

   The button is configured to open the Select table screen to select a free table to move to.

7. If you want to change the appearance or text of the button's label, see *Changing the appearance and text of a one-shot button label* on page 119.

8. If you want to change the background colour or image of the button, see *Changing the background colour or image of a one-shot button* on page 122.
9. Press anywhere on the Transaction screen to close the One-shot button screen.
10. Press Save.

    The one-shot buttons are saved.

Creating a one-shot button to change an item's price on the Portal

You can create a one-shot button to change the price of an item on the Point of Sale and send the new price to the Portal. Price changes affect all sites that sell that item, and can only be performed by operators with the Price Edit Portal privilege.

> **Note:** If you want to create a one-shot button to temporarily override an item's price, see *Creating a one-shot button to override an item price* on page 216.

To create a one-shot button to override an item price:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

2. Press **Edit one-shot buttons**.

   One-shot button editing is enabled on the Transaction screen.

> **Note:** You cannot use one-shot buttons while editing is enabled, with the exception of buttons that open one-shot button pages. Save or cancel your changes if you want to use the buttons.

3. Press and hold where you want the one-shot button to be placed.

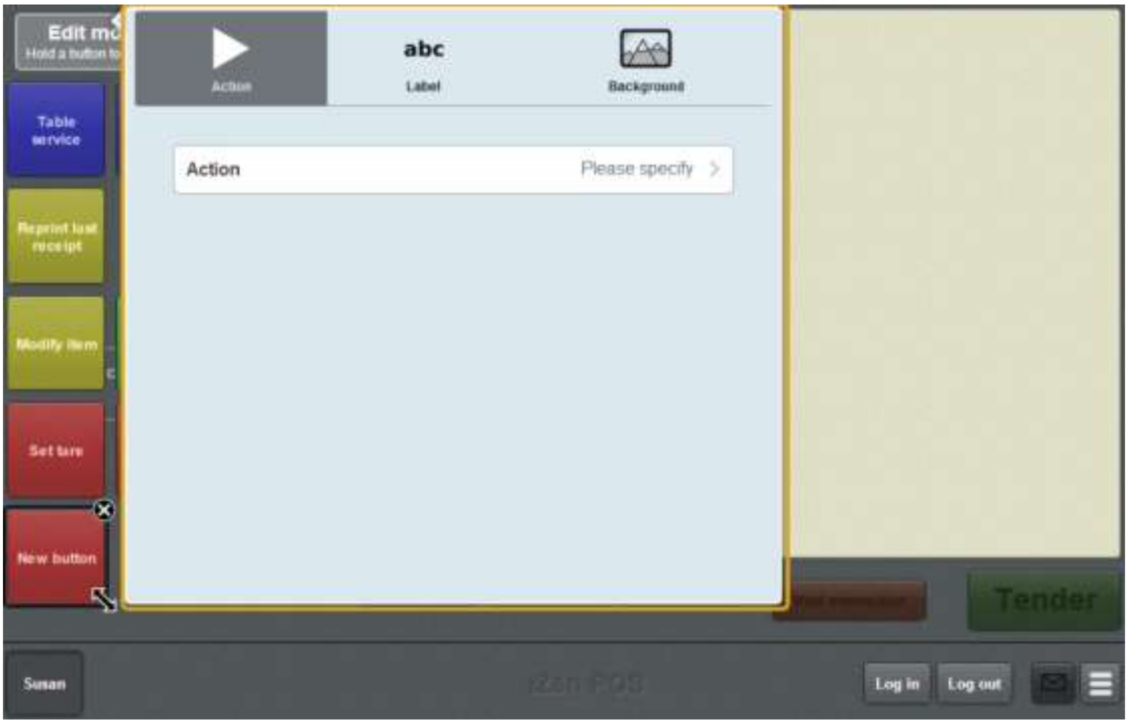
   The One-shot button screen is displayed.

> **Note**: The Point of Sale displays the most recently-viewed tab of the One-shot button screen. This is useful if you want to quickly edit the same attributes of multiple buttons.

> **Tip**: If you have already created a one-shot button, the Point of Sale matches the background and font of the closest one-shot button when creating a new button. If you need to create several buttons that look alike, create them near each other and then drag them to where you want them to appear.

4. Press ▶.

   The Action tab of the One-shot button screen is displayed.



5. Press **Action**.

   The list of available one-shot button actions is displayed.

6. Press **Price change**.

   The button is configured to change the price of an item and send the new price to the Portal.

7. If you want to change the appearance or text of the button's label, see *Changing the appearance and text of a one-shot button label* on page 119.

8. If you want to change the background colour or image of the button, see *Changing the background colour or image of a one-shot button* on page 122.

Note: You can configure the terminal to require a supervisor's authorisation to perform this button's function. See *Terminal setup screen - Security tab* on page 50.

9. Press anywhere on the Transaction screen to close the One-shot button screen.

10. Press Save.

    The one-shot buttons are saved.

Creating a one-shot button to record no-sales

You can create a one-shot button to record a no-sale.

> **Note:** You can record a no-sale without creating a one-shot button. See *Recording a no-sale* on page 354.

To create a one-shot button to record a no-sale:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

2. Press **Edit one-shot buttons**.

   One-shot button editing is enabled on the Transaction screen.

Note: You cannot use one-shot buttons while editing is enabled, with the exception of buttons that open one-shot button pages. Save or cancel your changes if you want to use the buttons.

3. Press and hold where you want the one-shot button to be placed.

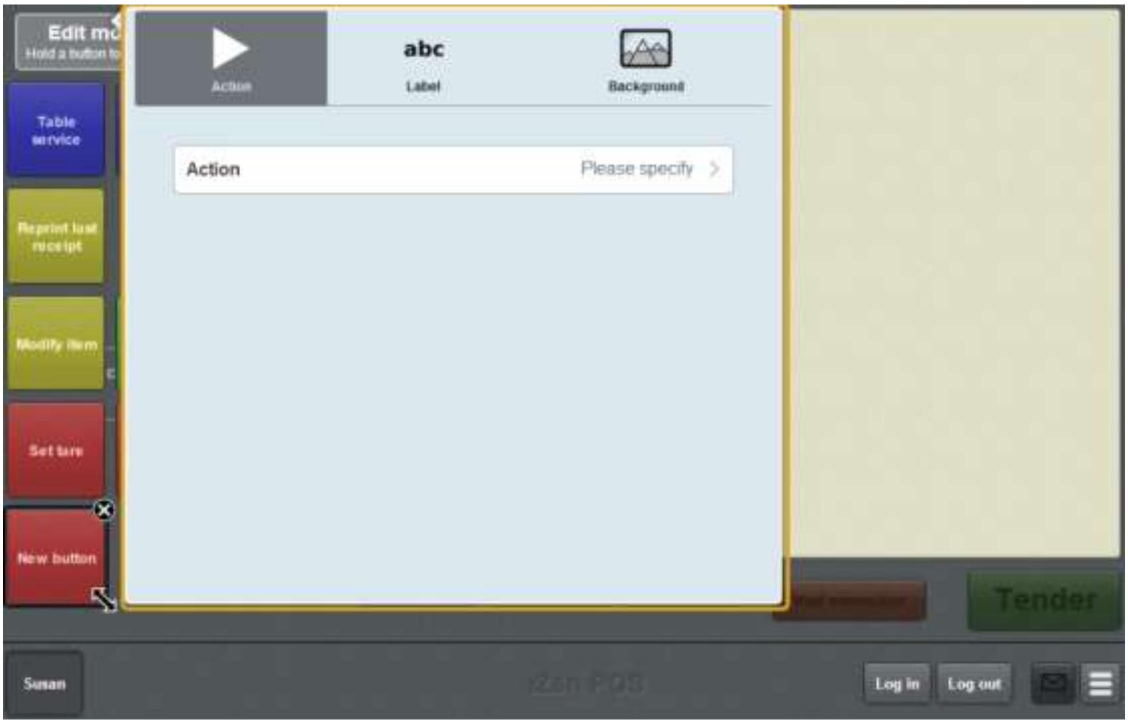
   The One-shot button screen is displayed.

Note: The Point of Sale displays the most recently-viewed tab of the One-shot button screen. This is useful if you want to quickly edit the same attributes of multiple buttons.

Tip: If you have already created a one-shot button, the Point of Sale matches the background and font of the closest one-shot button when creating a new button. If you need to create several buttons that look alike, create them near each other and then drag them to where you want them to appear.

4. Press ▶.

   The Action tab of the One-shot button screen is displayed.



Action Please specify

5. Press **Action**.

   The list of available one-shot button actions is displayed.

6. Press **No sale**.

   The button is configured to record a no-sale.

7. If you want to change the appearance or text of the button's label, see *Changing the appearance and text of a one-shot button label* on page 119.

8. If you want to change the background colour or image of the button, see *Changing the background colour or image of a one-shot button* on page 122.

Note: You can configure the terminal to require a supervisor's authorisation to perform this button's function. See *Terminal setup screen - Security tab* on page 50.

9. Press anywhere on the Transaction screen to close the One-shot button screen.
10. Press Save.

    The one-shot buttons are saved.

Creating a one-shot button to reprint an order

You can create a one-shot button to reprint a table order in the kitchen.

To create a one-shot button to reprint a table order:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

2. Press **Edit one-shot buttons**.

   One-shot button editing is enabled on the Transaction screen.

> **Note:** You cannot use one-shot buttons while editing is enabled, with the exception of buttons that open one-shot button pages. Save or cancel your changes if you want to use the buttons.

3. Press and hold where you want the one-shot button to be placed.

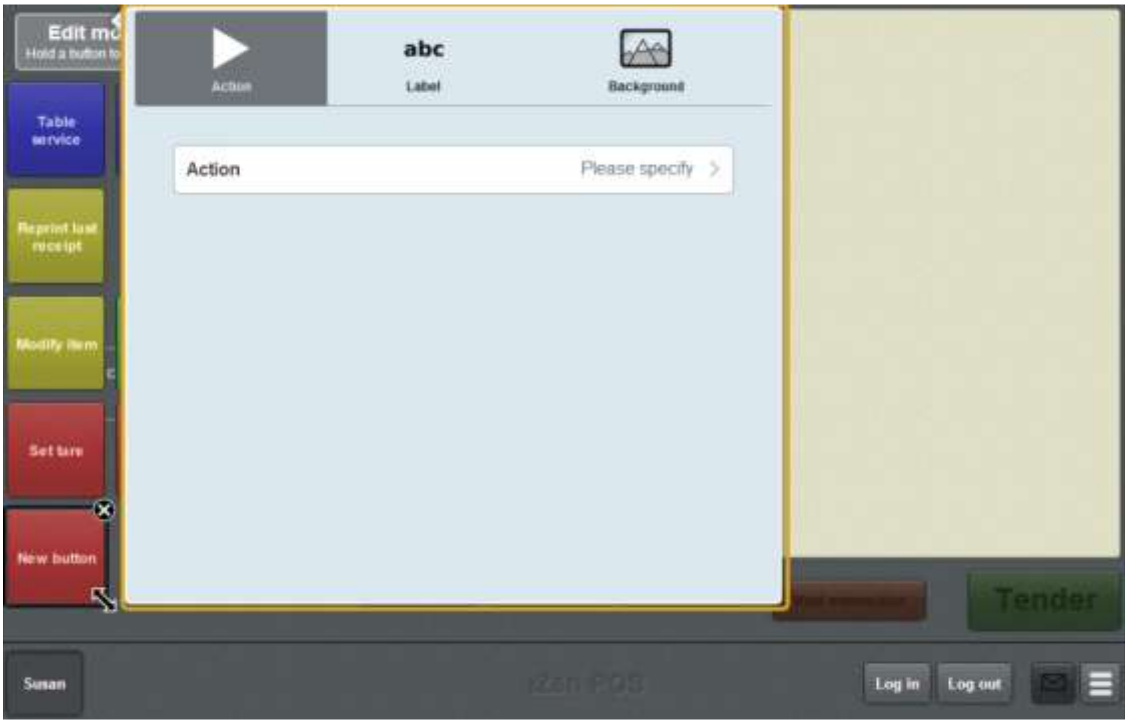
   The One-shot button screen is displayed.

> **Note**: The Point of Sale displays the most recently-viewed tab of the One-shot button screen. This is useful if you want to quickly edit the same attributes of multiple buttons.

> **Tip**: If you have already created a one-shot button, the Point of Sale matches the background and font of the closest one-shot button when creating a new button. If you need to create several buttons that look alike, create them near each other and then drag them to where you want them to appear.

4. Press ▶ .

   The Action tab of the One-shot button screen is displayed.



5. Press **Action**.

   The list of available one-shot button actions is displayed.

6. Press **Reprint order**.

   The button is configured to reprint the order of the selected table.

7. If you want to change the appearance or text of the button's label, see *Changing the appearance and text of a one-shot button label* on page 119.

8. If you want to change the background colour or image of the button, see *Changing the background colour or image of a one-shot button* on page 122.

> **Note:** You can configure the terminal to require a supervisor's authorisation to perform this button's function. See *Terminal setup screen - Security tab* on page 50.

9. Press anywhere on the Transaction screen to close the One-shot button screen.
10. Press Save.

    The one-shot buttons are saved.

Creating a one-shot button to sell or look up an item

You can create a one-shot button to find a specified item and either:

- Display the item in the Item field.
- Add the item to the transaction.

To create a one-shot button to find an item:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

2. Press **Edit one-shot buttons**.

   One-shot button editing is enabled on the Transaction screen.

> **Note:** You cannot use one-shot buttons while editing is enabled, with the exception of buttons that open one-shot button pages. Save or cancel your changes if you want to use the buttons.

3. Press and hold where you want the one-shot button to be placed.

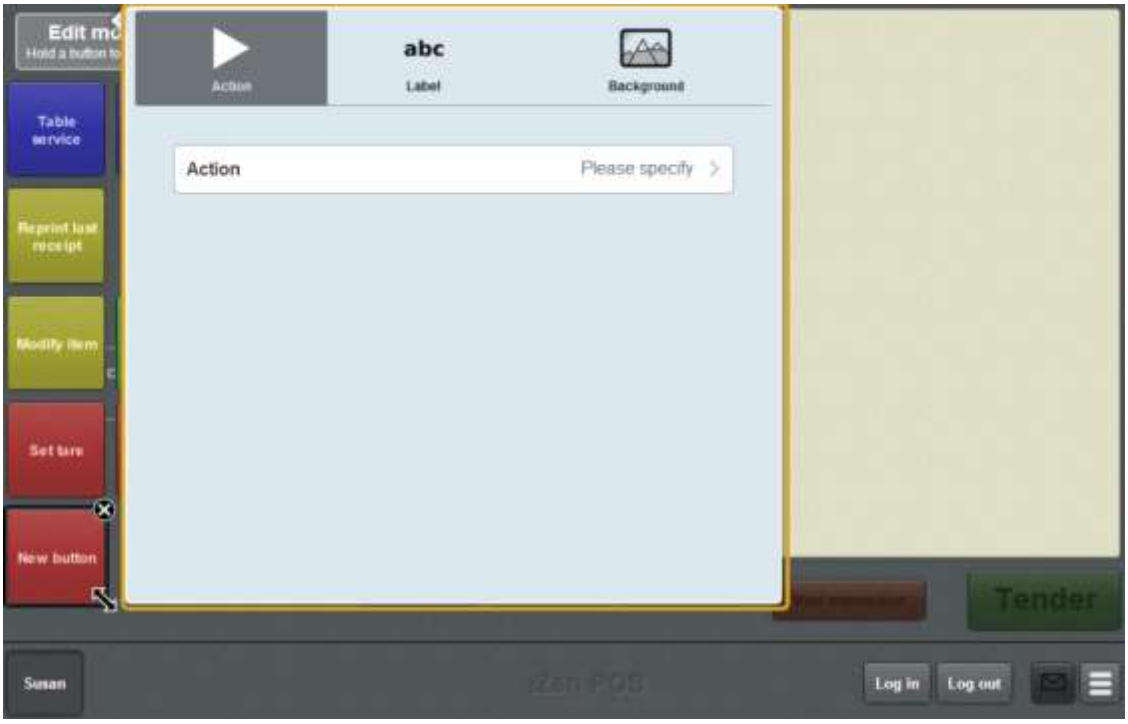
   The One-shot button screen is displayed.

> **Note**: The Point of Sale displays the most recently-viewed tab of the One-shot button screen. This is useful if you want to quickly edit the same attributes of multiple buttons.

> **Tip**: If you have already created a one-shot button, the Point of Sale matches the background and font of the closest one-shot button when creating a new button. If you need to create several buttons that look alike, create them near each other and then drag them to where you want them to appear.

4. Press ▶.

   The Action tab of the One-shot button screen is displayed.



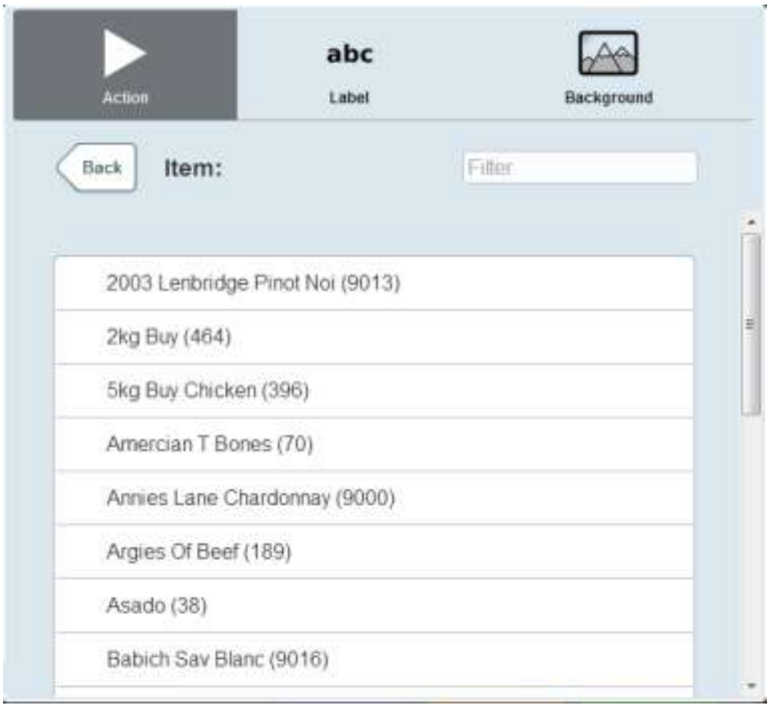
Action Please specify

5. Press **Action**.

   The list of available one-shot button actions is displayed.

6. Press **Sell item**.
7. Press **Item**.

   The first twenty items in the product master are displayed.

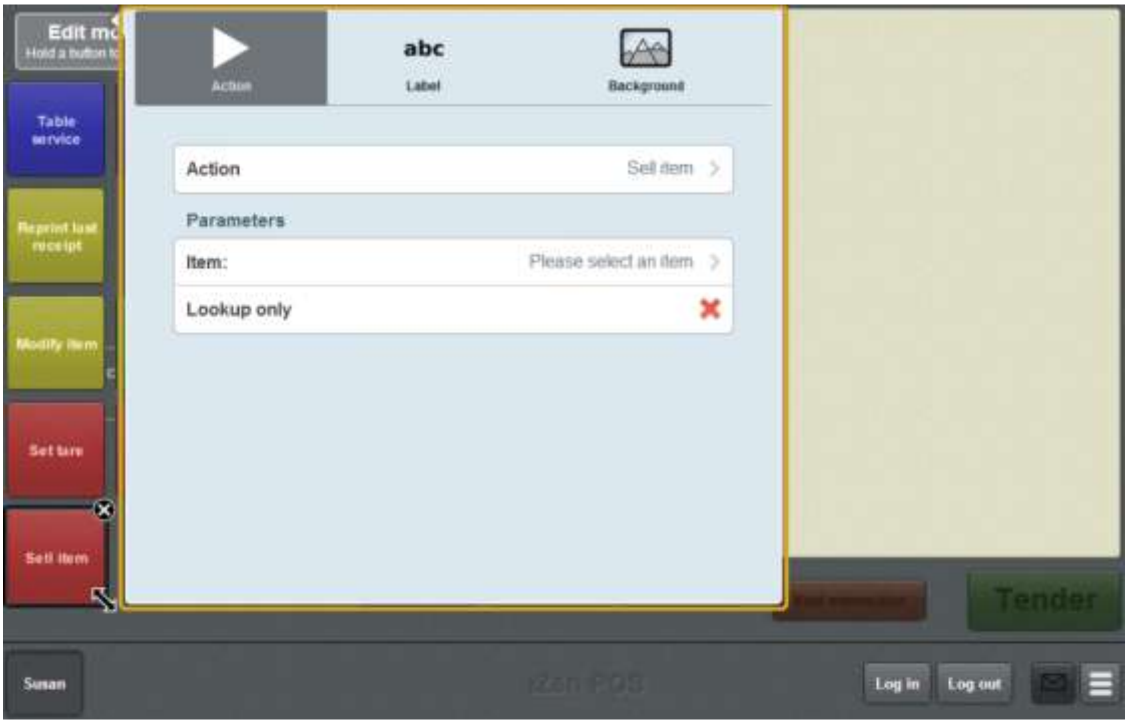


8. Type part or all of the item name in the **Filter** field.
   The list is filtered to the first twenty items that match your selection.

> **Note:** The filter searches from the beginning of each word in the item name, not mid-word. For example, "re" returns all items with "**re**d" and "**re**ady" in the name, but does not return items with "g**re**en".

9. Select the item.

   The button is configured to select the item.


Action: Sell item

Parameters

Item: Please select an item

Lookup only ✗

10. Select (✓) the **Lookup only** field if you want the one-shot button to find the item but not add it to the transaction.

    Otherwise the item is automatically added to the transaction when the one-shot button is pressed.

    > **Note:** The button uses the label specified in the Portal **POS Label** field or, if that field is blank, the Portal **POS Description** field.

11. If you want to change the appearance or text of the button's label, see *Changing the appearance and text of a one-shot button label* on page 119.
12. If you want to change the background colour or image of the button, see *Changing the background colour or image of a one-shot button* on page 122.

> **Note:** You can configure the terminal to require a supervisor's authorisation to perform this button's function. See *Terminal setup screen - Security tab* on page 50.

13. Press anywhere on the Transaction screen to close the One-shot button screen.
14. Press Save.

    The one-shot buttons are saved.

Creating a one-shot button to set a discount

You can create a one-shot button to set a discount of an item to:

- A specific discount.
- A discount selected by the operator.

> **Note:** You can still add or remove a discount without creating a one-shot button. See *Applying a discount to an item* on page 434. Also see *Removing or changing a discount from an item* on page 437.

To create a one-shot button to set a discount:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

2. Press **Edit one-shot buttons**.

   One-shot button editing is enabled on the Transaction screen.

> **Note:** You cannot use one-shot buttons while editing is enabled, with the exception of buttons that open one-shot button pages. Save or cancel your changes if you want to use the buttons.

3. Press and hold where you want the one-shot button to be placed.

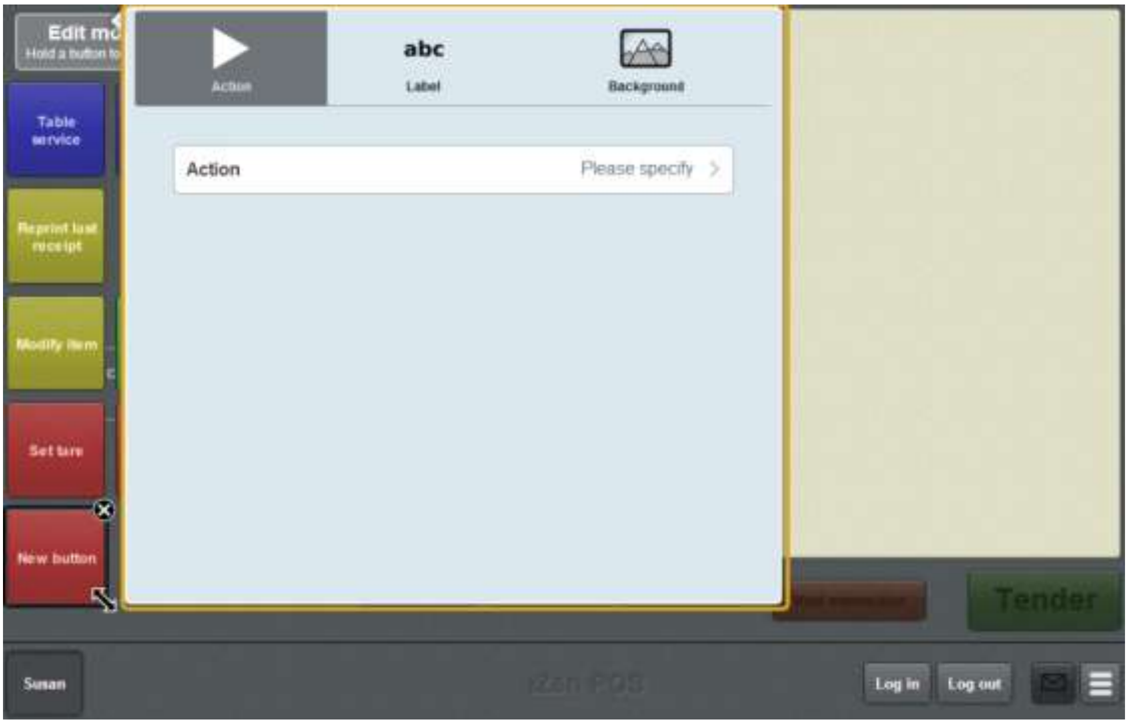
   The One-shot button screen is displayed.

> **Note**: The Point of Sale displays the most recently-viewed tab of the One-shot button screen. This is useful if you want to quickly edit the same attributes of multiple buttons.

> **Tip**: If you have already created a one-shot button, the Point of Sale matches the background and font of the closest one-shot button when creating a new button. If you need to create several buttons that look alike, create them near each other and then drag them to where you want them to appear.

4. Press ▶.

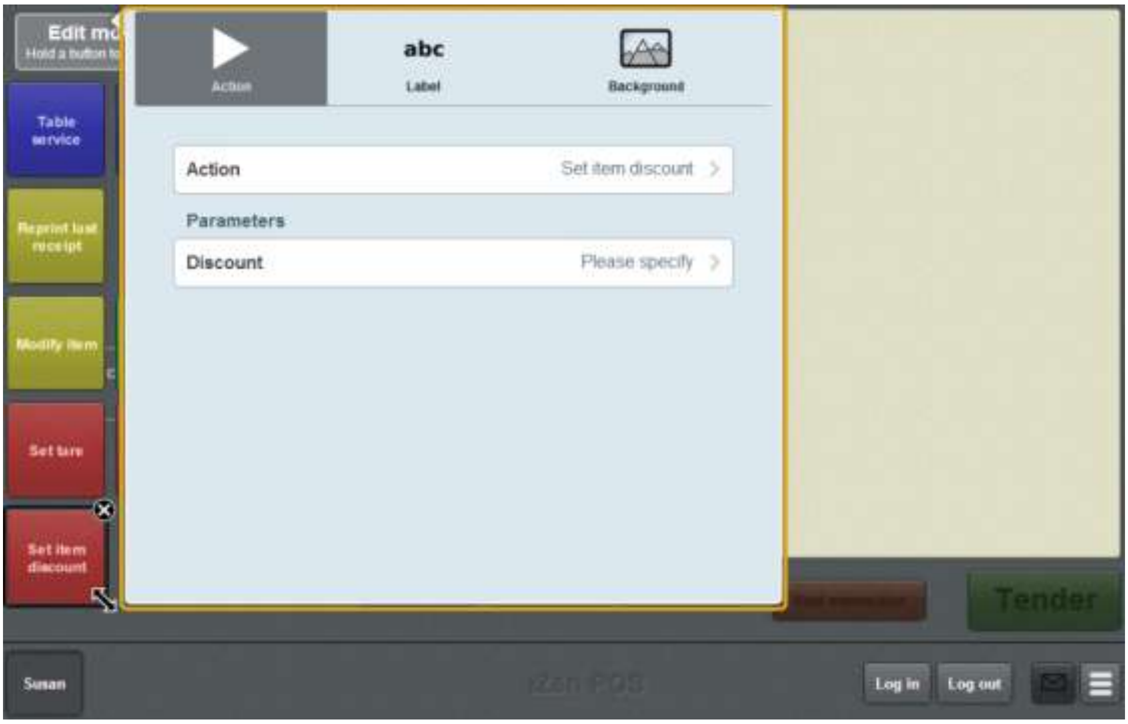
   The Action tab of the One-shot button screen is displayed.



5. Press **Action**.

   The list of available one-shot button actions is displayed.

6. Press **Set item discount**.



Action Set item discount

Parameters

Discount Please specify

7. Press **Discount**.

   The **Discounts** screen is displayed.

   Note: The available discounts depend on your Portal configuration.

8. Press the discount you want the button to select.

   Tip: If you want operators to be prompted for a discount amount, press **Set discount**.

   The one-shot button is configured to set the selected discount.

9. If you want to change the appearance or text of the button's label, see *Changing the appearance and text of a one-shot button label* on page 119.
10. If you want to change the background colour or image of the button, see *Changing the background colour or image of a one-shot button* on page 122.

Note: You can configure the terminal to require a supervisor's authorisation to perform this button's function. See *Terminal setup screen - Security tab* on page 50.

11. Press anywhere on the Transaction screen to close the One-shot button screen.
12. Press Save.

    The one-shot buttons are saved.

Creating a one-shot button to edit item quantities

You can create a one-shot button to set the quantity of an item to:

- a specific quantity, for example a set of five
- a quantity specified by the operator.

> **Note:** You can still set an item's quantity without creating a one-shot button. See *Changing an item's quantity* on page 429.

To create a one-shot button to set the quantity:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

2. Press **Edit one-shot buttons**.

   One-shot button editing is enabled on the Transaction screen.

Note: You cannot use one-shot buttons while editing is enabled, with the exception of buttons that open one-shot button pages. Save or cancel your changes if you want to use the buttons.

3. Press and hold where you want the one-shot button to be placed.

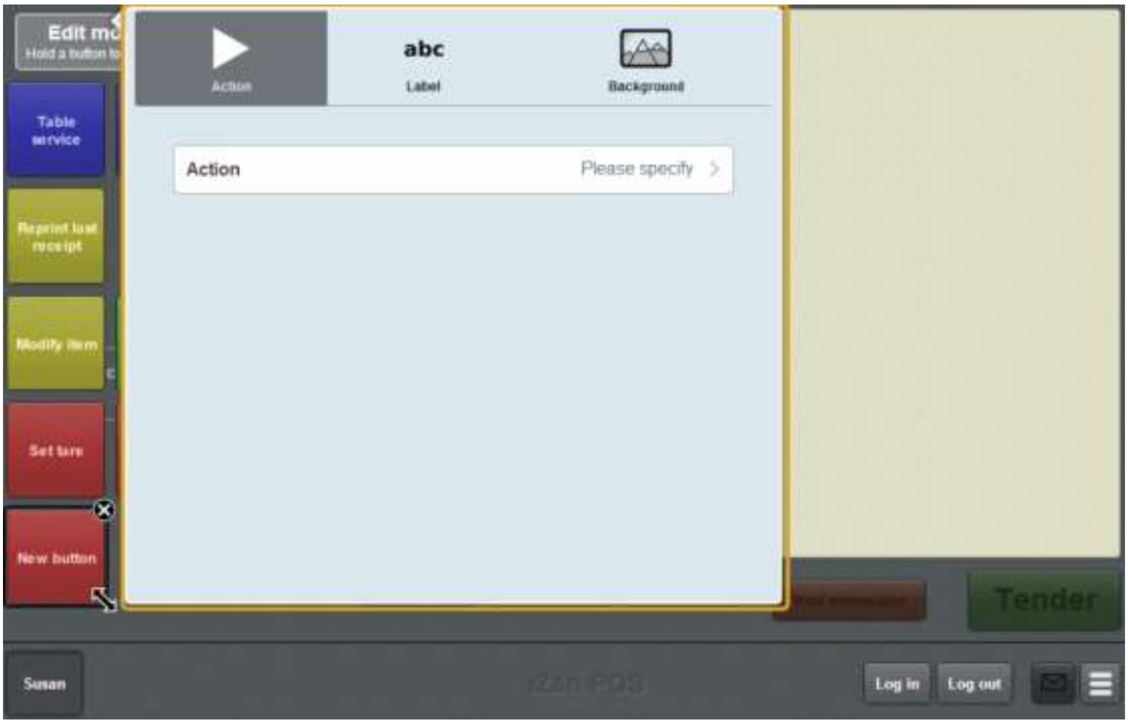
   The One-shot button screen is displayed.

Note: The Point of Sale displays the most recently-viewed tab of the One-shot button screen. This is useful if you want to quickly edit the same attributes of multiple buttons.

Tip: If you have already created a one-shot button, the Point of Sale matches the background and font of the closest one-shot button when creating a new button. If you need to create several buttons that look alike, create them near each other and then drag them to where you want them to appear.

4. Press ▶.

   The Action tab of the One-shot button screen is displayed.

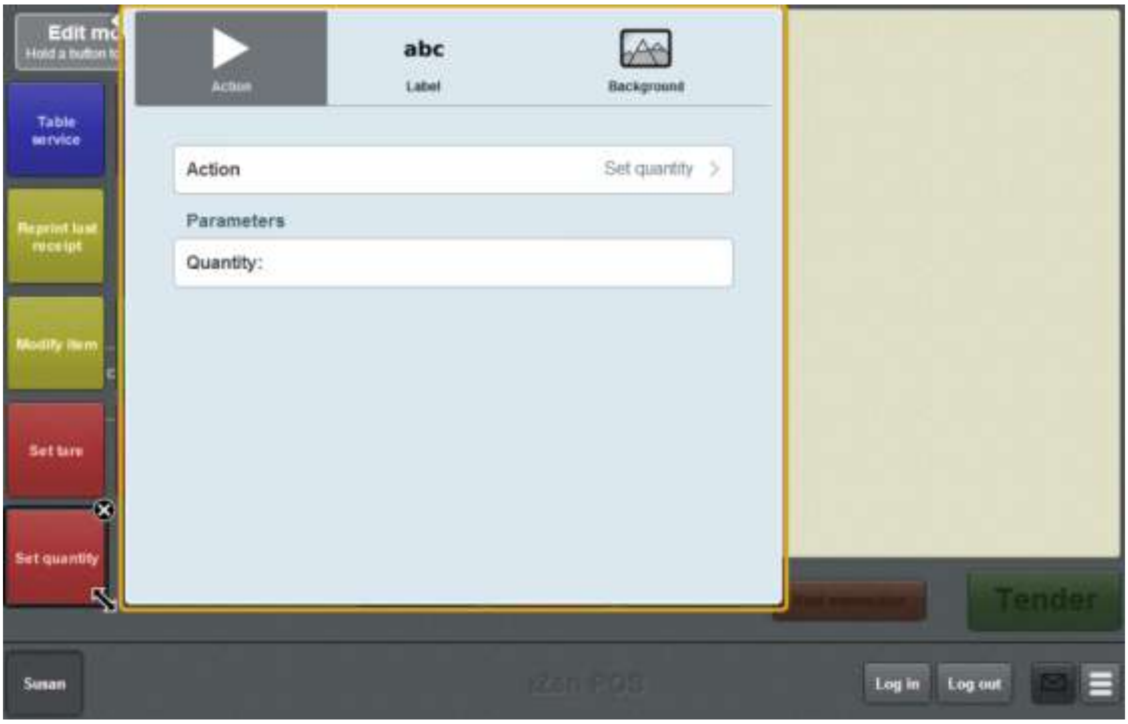


5. Press **Action**.

   The list of available one-shot button actions is displayed.

6. Press **Set quantity**.

   The button is configured to prompt the operator for the item's quantity.



Action Set quantity

Parameters

Quantity:

7. If you want to specify the quantity, press **Quantity**.
8. Type in the quantity.

   The one-shot button is configured to set the quantity of the item.

9. If you want to change the appearance or text of the button's label, see *Changing the appearance and text of a one-shot button label* on page 119.
10. If you want to change the background colour or image of the button, see *Changing the background colour or image of a one-shot button* on page 122.

> **Note:** You can configure the terminal to require a supervisor's authorisation to perform this button's function. See *Terminal setup screen - Security tab* on page 50.

11. Press anywhere on the Transaction screen to close the One-shot button screen.
12. Press Save.

    The one-shot buttons are saved.

Creating a one-shot button to override an item price

You can create a one-shot button to override the price of an item to:

- A specific price, for example to set an item to free.
- A price specified by the operator.

> **Note:** You can still override an item's price without creating a one-shot button. See *Overriding the price of an item* on page 441.

To create a one-shot button to override an item price:

1. From the Transaction screen, press .

   The Point of Sale menu is displayed.

2. Press **Edit one-shot buttons**.

   One-shot button editing is enabled on the Transaction screen.

Note: You cannot use one-shot buttons while editing is enabled, with the exception of buttons that open one-shot button pages. Save or cancel your changes if you want to use the buttons.

3. Press and hold where you want the one-shot button to be placed.

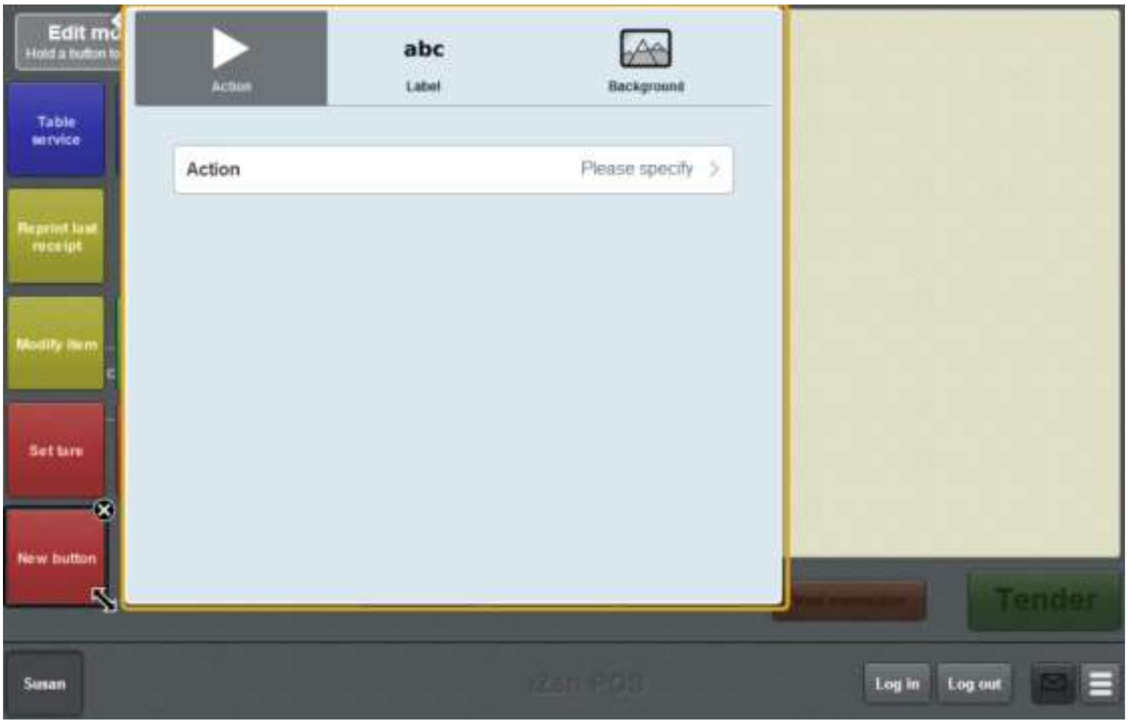
   The One-shot button screen is displayed.

Note: The Point of Sale displays the most recently-viewed tab of the One-shot button screen. This is useful if you want to quickly edit the same attributes of multiple buttons.

Tip: If you have already created a one-shot button, the Point of Sale matches the background and font of the closest one-shot button when creating a new button. If you need to create several buttons that look alike, create them near each other and then drag them to where you want them to appear.

4. Press ▶.

   The Action tab of the One-shot button screen is displayed.

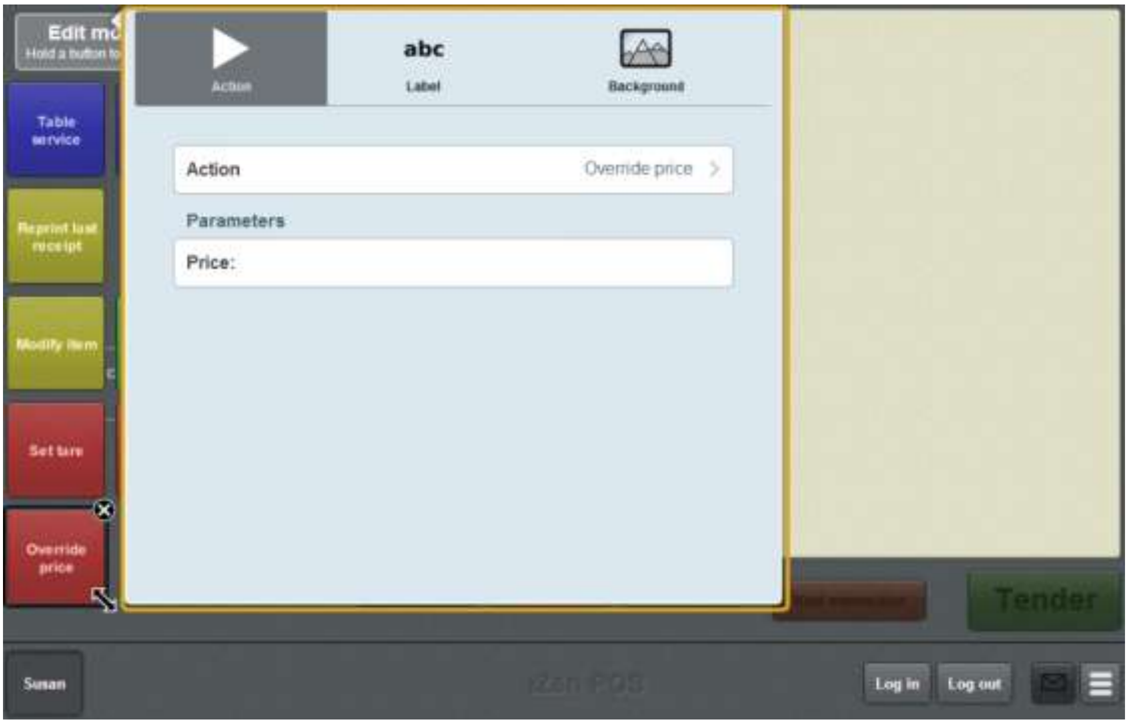


5. Press **Action**.

   The list of available one-shot button actions is displayed.

6. Press **Override price**.

   The button is configured to override the price of an item.



Action: Override price

Parameters

Price:

7. If you want to specify the override price, press **Price**.
8. Type in the override price.

   The one-shot button is configured to override the item's original price to this price.

9. If you want to change the appearance or text of the button's label, see *Changing the appearance and text of a one-shot button label* on page 119.
10. If you want to change the background colour or image of the button, see *Changing the background colour or image of a one-shot button* on page 122.

> **Note:** You can configure the terminal to require a supervisor's authorisation to perform this button's function. See *Terminal setup screen - Security tab* on page 50.

11. Press anywhere on the Transaction screen to close the One-shot button screen.
12. Press Save.

    The one-shot buttons are saved.

Creating a one-shot button to modify items

You can create a one-shot button to add or remove options from a selected item. For example, adding sugar or milk to a coffee order.

> **Note:** You can only modify items that have been configured with options in the Portal.

To create a one-shot button to modify an item:

1. From the Transction screen, press ☰.

   The Point of Sale menu is displayed.

2. Press **Edit one-shot buttons**.

   One-shot button editing is enabled on the Transaction screen.

Note: You cannot use one-shot buttons while editing is enabled, with the exception of buttons that open one-shot button pages. Save or cancel your changes if you want to use the buttons.

3. Press and hold where you want the one-shot button to be placed.

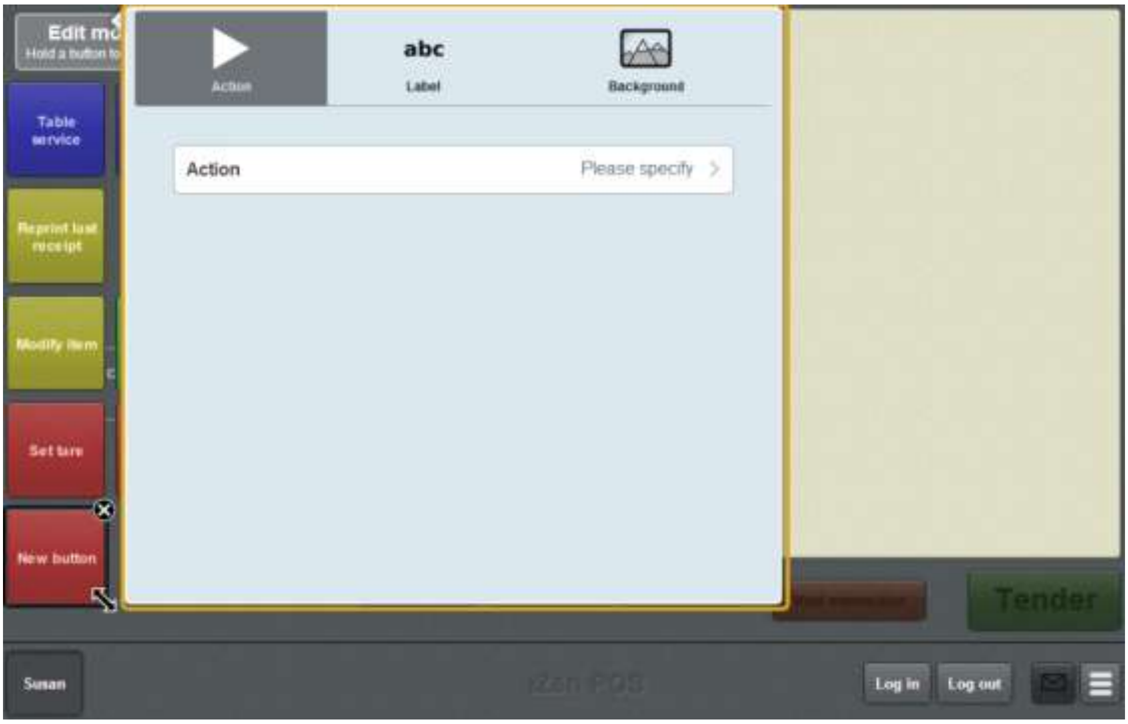
   The One-shot button screen is displayed.

Note: The Point of Sale displays the most recently-viewed tab of the One-shot button screen. This is useful if you want to quickly edit the same attributes of multiple buttons.

Tip: If you have already created a one-shot button, the Point of Sale matches the background and font of the closest one-shot button when creating a new button. If you need to create several buttons that look alike, create them near each other and then drag them to where you want them to appear.

4. Press ▶.

   The Action tab of the One-shot button screen is displayed.



Action Please specify

5. Press **Action**.

   The list of available one-shot button actions is displayed.

6. Press **Modify item**.

   The button is configured to modify items.

7. If you want to change the appearance or text of the button's label, see *Changing the appearance and text of a one-shot button label* on page 119.

8. If you want to change the background colour or image of the button, see *Changing the background colour or image of a one-shot button* on page 122.

> **Note:** You can configure the terminal to require a supervisor's authorisation to perform this button's function. See *Terminal setup screen - Security tab* on page 50.

9. Press anywhere on the Transaction screen to close the One-shot button screen.
10. Press Save.

    The one-shot buttons are saved.

Creating a one-shot button to sell gift vouchers

You can create a one-shot button to add a gift voucher to the current transaction. You can create one-shot buttons that:

- Create a gift voucher for a specified amount.
- Prompt the operator for the gift voucher amount before adding it to the transaction.

> **Note:** You must configure one-shot buttons for gift vouchers if you want to add gift vouchers to your transactions. See *Creating gift vouchers* on page 421.

To create a one-shot button to create a gift voucher:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

2. Press **Edit one-shot buttons**.

   One-shot button editing is enabled on the Transaction screen.

Note: You cannot use one-shot buttons while editing is enabled, with the exception of buttons that open one-shot button pages. Save or cancel your changes if you want to use the buttons.

3. Press and hold where you want the one-shot button to be placed.

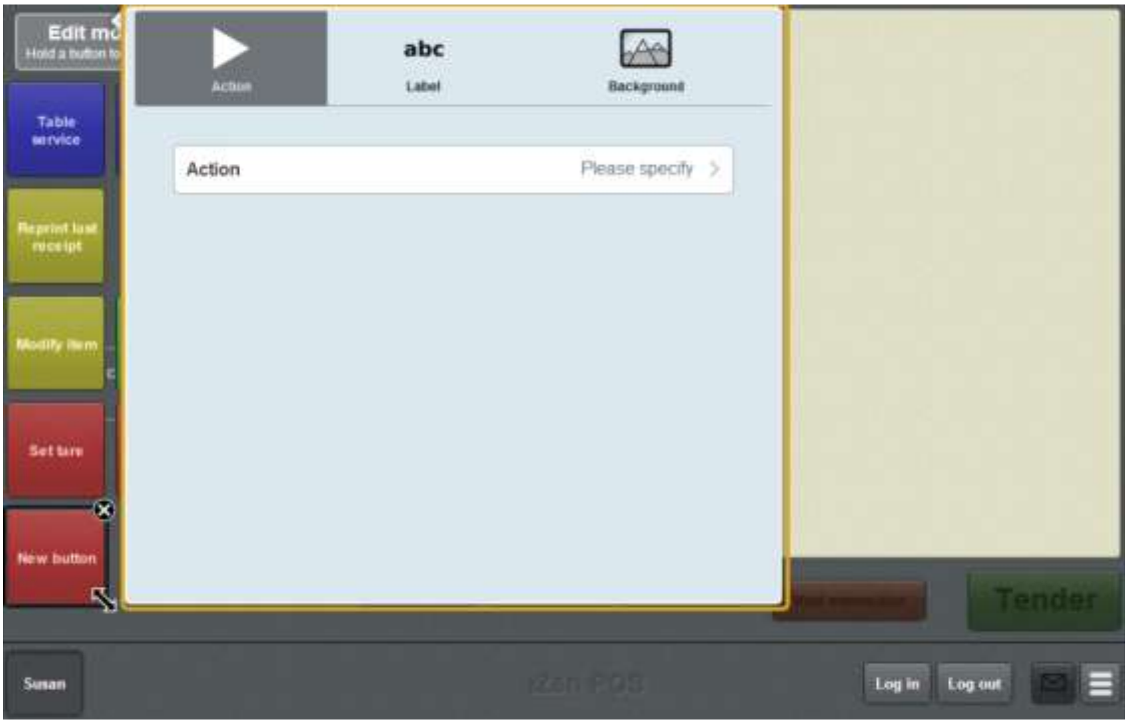
   The One-shot button screen is displayed.

Note: The Point of Sale displays the most recently-viewed tab of the One-shot button screen. This is useful if you want to quickly edit the same attributes of multiple buttons.

Tip: If you have already created a one-shot button, the Point of Sale matches the background and font of the closest one-shot button when creating a new button. If you need to create several buttons that look alike, create them near each other and then drag them to where you want them to appear.

4. Press ▶ .

   The Action tab of the One-shot button screen is displayed.

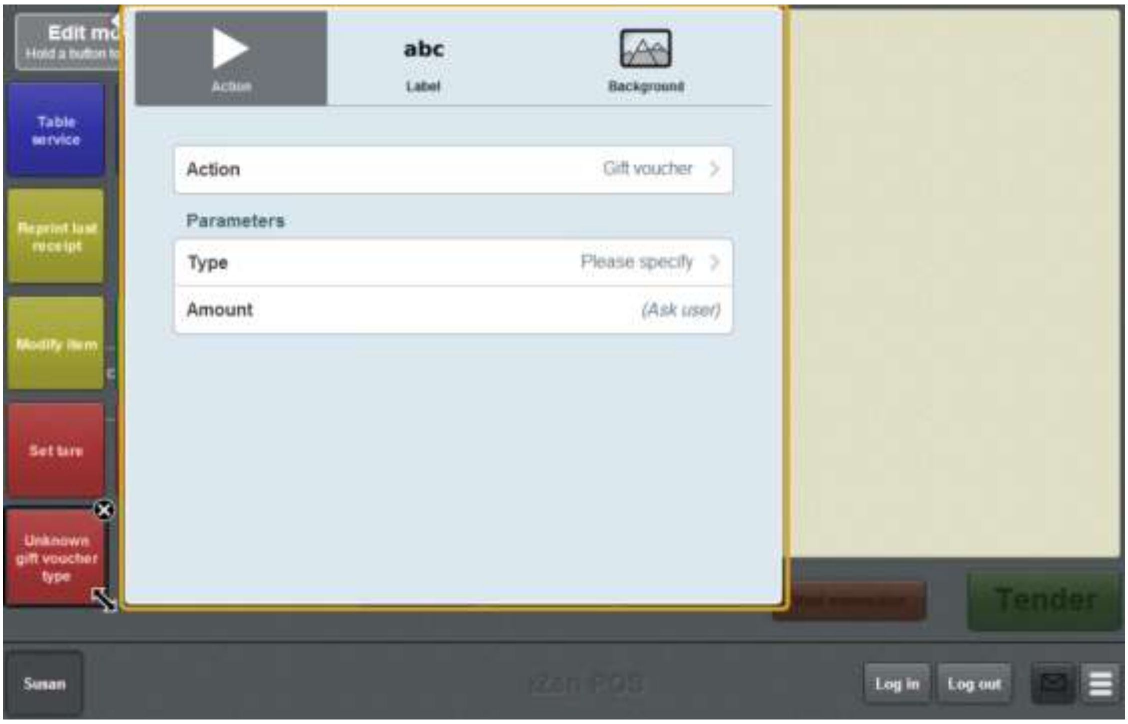


5. Press **Action**.

   The list of available one-shot button actions is displayed.

6. Press **Gift voucher**.

   The button is configured to create a gift voucher.



Action Gift voucher

Parameters

Type Please specify

Amount (Ask user)

7. Press **Type**.

   The Gift voucher type screen is displayed.

8. Select a type for the gift voucher.

> **Note:** The available gift voucher types depend on your Portal configuration.

9. If you want to specify the gift voucher amount, press **Amount**:

   Either:

   - Type in the value of the gift voucher created by this button.
   - Leave the value blank to configure the button to prompt the operator for the amount.

> **Tip:** You can create additional one-shot buttons for gift vouchers to represent your range of gift voucher denominations. You can also create a one-shot button that prompts the operator for the gift voucher amount.

10. If you want to change the appearance or text of the button's label, see *Changing the appearance and text of a one-shot button label* on page 119.
11. If you want to change the background colour or image of the button, see *Changing the background colour or image of a one-shot button* on page 122.

> **Note:** You can configure the terminal to require a supervisor's authorisation to perform this button's function. See *Terminal setup screen - Security tab* on page 50.

12. Press anywhere on the Transaction screen to close the One-shot button screen.

13. Press Save.

    The one-shot buttons are saved.

Creating a one-shot button for petty cash

You can create a one-shot button to record petty cash expenses.

To create a one-shot button for customer payments:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

2. Press **Edit one-shot buttons**.

   One-shot button editing is enabled on the Transaction screen.

Note: You cannot use one-shot buttons while editing is enabled, with the exception of buttons that open one-shot button pages. Save or cancel your changes if you want to use the buttons.

3. Press and hold where you want the one-shot button to be placed.

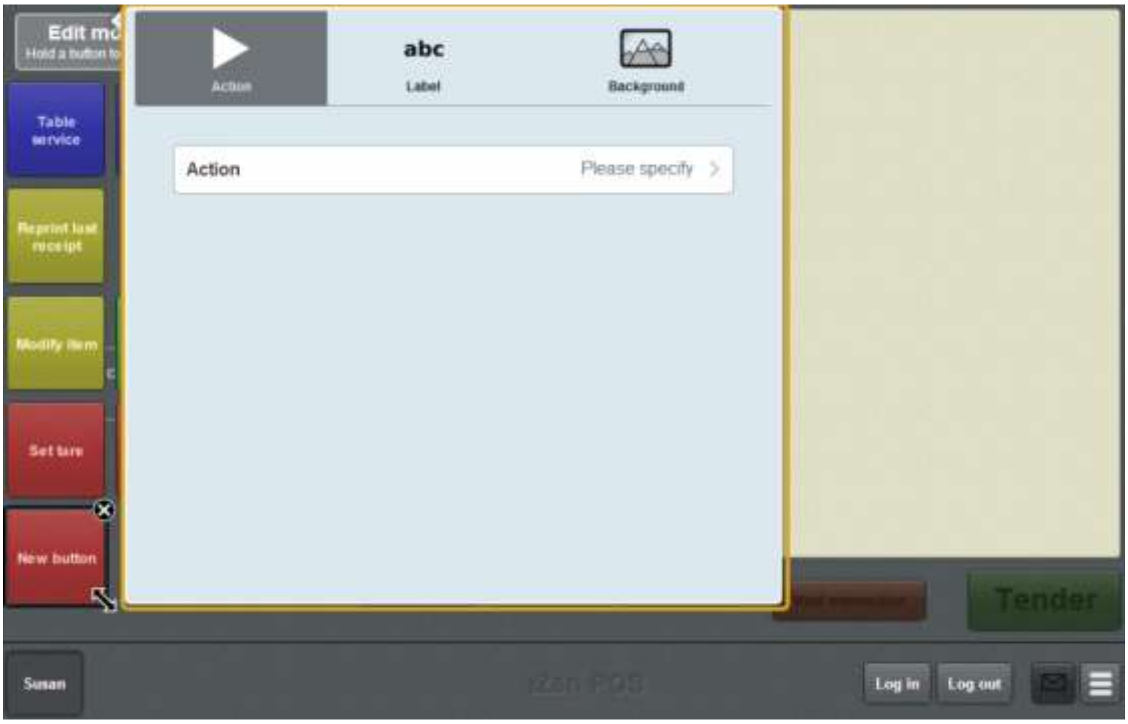
   The One-shot button screen is displayed.

Note: The Point of Sale displays the most recently-viewed tab of the One-shot button screen. This is useful if you want to quickly edit the same attributes of multiple buttons.

Tip: If you have already created a one-shot button, the Point of Sale matches the background and font of the closest one-shot button when creating a new button. If you need to create several buttons that look alike, create them near each other and then drag them to where you want them to appear.

4. Press ▶.

   The Action tab of the One-shot button screen is displayed.



5. Press **Action**.

   The list of available one-shot button actions is displayed.

6. Press **Petty cash**.

   The button is configured to open the Petty cash screen to record petty cash expenses.

7. If you want to change the appearance or text of the button's label, see *Changing the appearance and text of a one-shot button label* on page 119.

8. If you want to change the background colour or image of the button, see *Changing the background colour or image of a one-shot button* on page 122.

> **Note:** You can configure the terminal to require a supervisor's authorisation to perform this button's function. See *Terminal setup screen - Security tab* on page 50.

9. Press anywhere on the Transaction screen to close the One-shot button screen.
10. Press Save.

    The one-shot buttons are saved.

Creating a one-shot button to print a table bill

You can create a one-shot button to print the bill of a table.

To create a one-shot button to print a table bill:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

2. Press **Edit one-shot buttons**.

   One-shot button editing is enabled on the Transaction screen.

> **Note:** You cannot use one-shot buttons while editing is enabled, with the exception of buttons that open one-shot button pages. Save or cancel your changes if you want to use the buttons.

3. Press and hold where you want the one-shot button to be placed.

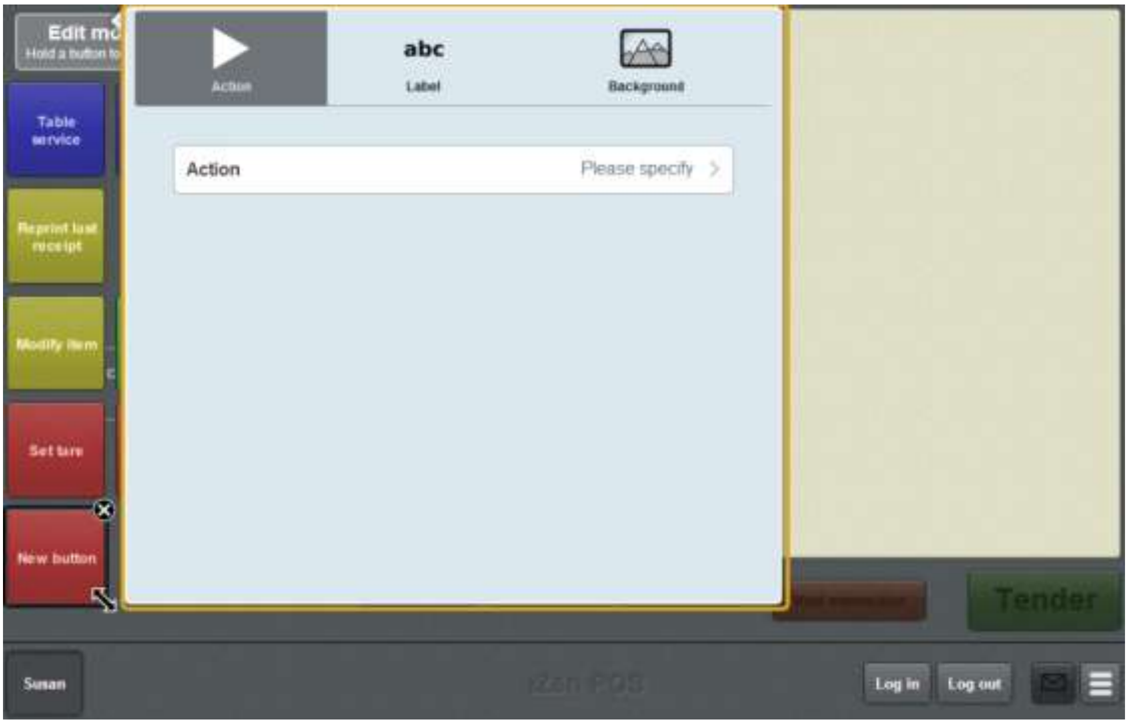
   The One-shot button screen is displayed.

> **Note**: The Point of Sale displays the most recently-viewed tab of the One-shot button screen. This is useful if you want to quickly edit the same attributes of multiple buttons.

> **Tip**: If you have already created a one-shot button, the Point of Sale matches the background and font of the closest one-shot button when creating a new button. If you need to create several buttons that look alike, create them near each other and then drag them to where you want them to appear.

4. Press ▶ .

   The Action tab of the One-shot button screen is displayed.



5. Press **Action**.

   The list of available one-shot button actions is displayed.

6. Press **Print Bill**.

   The button is configured to print the bill of a table.

7. If you want to change the appearance or text of the button's label, see *Changing the appearance and text of a one-shot button label* on page 119.

8. If you want to change the background colour or image of the button, see *Changing the background colour or image of a one-shot button* on page 122.

Note: You can configure the terminal to require a supervisor's authorisation to perform this button's function. See *Terminal setup screen - Security tab* on page 50.

9. Press anywhere on the Transaction screen to close the One-shot button screen.

10. Press Save.

    The one-shot buttons are saved.

Creating a one-shot button to print labels

You can create a one-shot button to print item labels on the base station. Labels for items sold by both weight and unit can be printed using the same print label one-shot button.

See *Printing a label for an item sold by unit* on page 364. Also see *Printing a label for an item sold by weight* on page 368.

To create a one-shot button to print item labels:

1. From the Transaction screen, press .

   The Point of Sale menu is displayed.

2. Press **Edit one-shot buttons**.

   One-shot button editing is enabled on the Transaction screen.

> **Note:** You cannot use one-shot buttons while editing is enabled, with the exception of buttons that open one-shot button pages. Save or cancel your changes if you want to use the buttons.

3. Press and hold where you want the one-shot button to be placed.

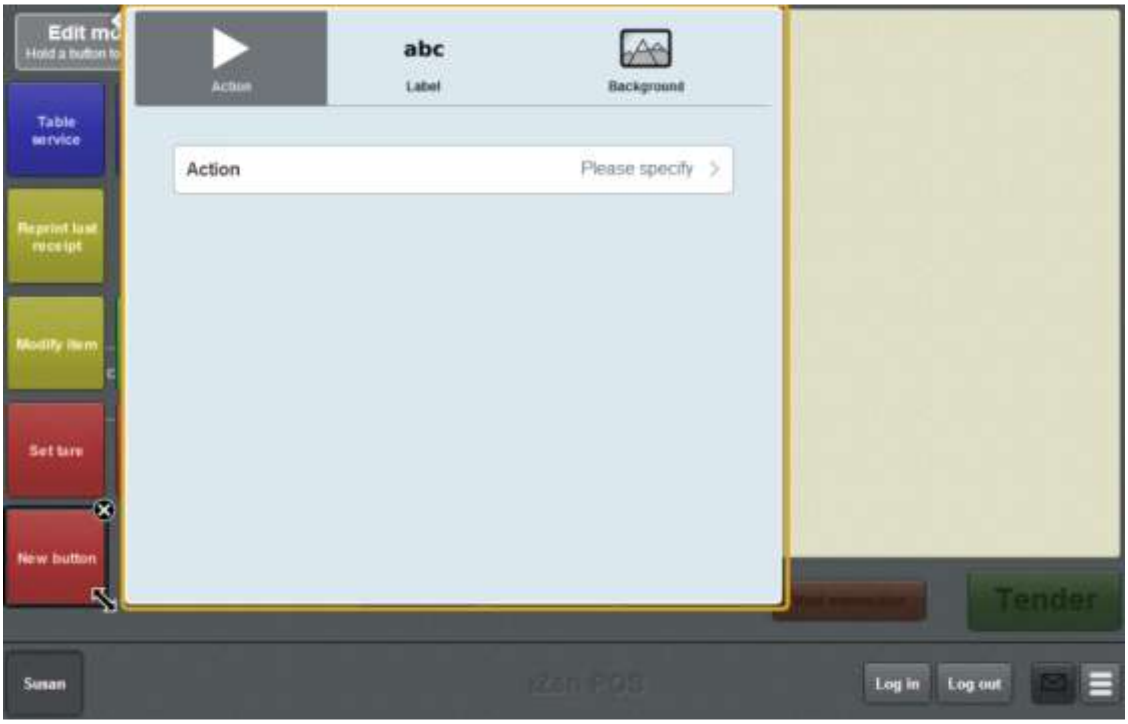
   The One-shot button screen is displayed.

> **Note**: The Point of Sale displays the most recently-viewed tab of the One-shot button screen. This is useful if you want to quickly edit the same attributes of multiple buttons.

> **Tip**: If you have already created a one-shot button, the Point of Sale matches the background and font of the closest one-shot button when creating a new button. If you need to create several buttons that look alike, create them near each other and then drag them to where you want them to appear.

4. Press ▶ .

   The Action tab of the One-shot button screen is displayed.



5. Press **Action**.

   The list of available one-shot button actions is displayed.

6. Press **Print label**.

   The button is configured to print item labels.

7. If you want to change the appearance or text of the button's label, see *Changing the appearance and text of a one-shot button label* on page 119.

8. If you want to change the background colour or image of the button, see *Changing the background colour or image of a one-shot button* on page 122.

Note: You can configure the terminal to require a supervisor's authorisation to perform this button's function. See *Terminal setup screen - Security tab* on page 50.

9. Press anywhere on the Transaction screen to close the One-shot button screen.
10. Press Save.

    The one-shot buttons are saved.

Creating a one-shot button to print invoices

You can create a one-shot button to print a customer invoice.

See *Printing an invoice* on page 557.

To create a one-shot button to print an invoice:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

2. Press **Edit one-shot buttons**.

   One-shot button editing is enabled on the Transaction screen.

Note: You cannot use one-shot buttons while editing is enabled, with the exception of buttons that open one-shot button pages. Save or cancel your changes if you want to use the buttons.

3. Press and hold where you want the one-shot button to be placed.

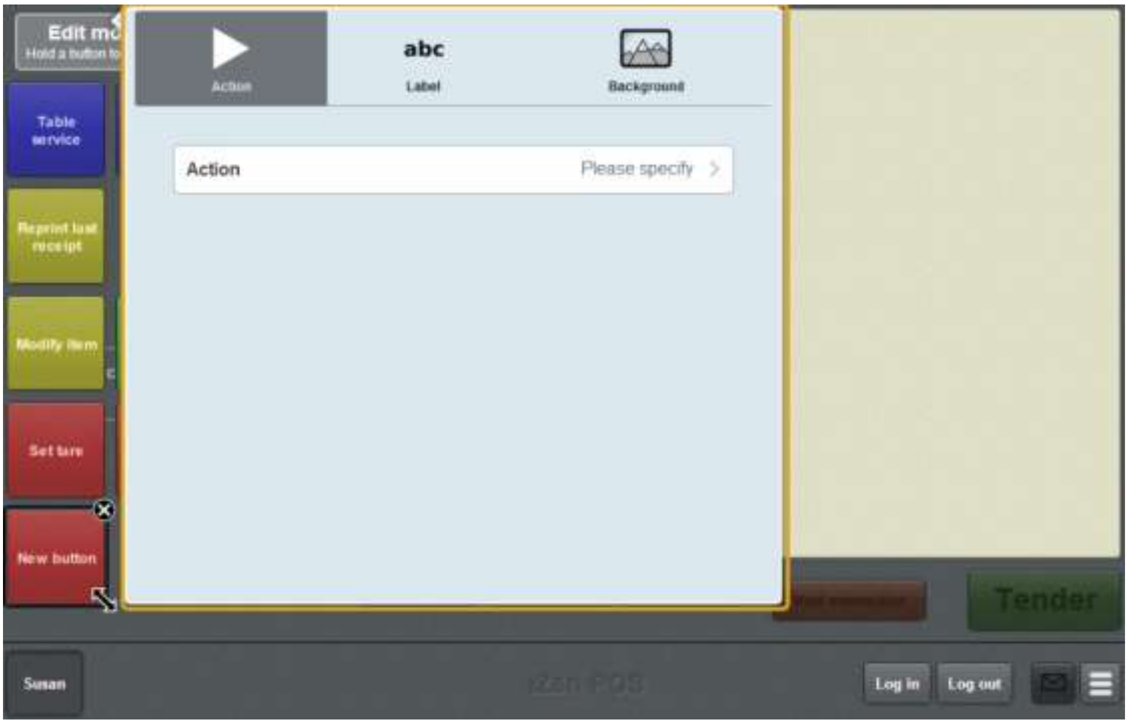
   The One-shot button screen is displayed.

Note: The Point of Sale displays the most recently-viewed tab of the One-shot button screen. This is useful if you want to quickly edit the same attributes of multiple buttons.

Tip: If you have already created a one-shot button, the Point of Sale matches the background and font of the closest one-shot button when creating a new button. If you need to create several buttons that look alike, create them near each other and then drag them to where you want them to appear.

4. Press ▶.

   The Action tab of the One-shot button screen is displayed.



5. Press **Action**.

   The list of available one-shot button actions is displayed.

6. Press **Print invoice**.

   The button is configured to print a customer invoice.

7. If you want to change the appearance or text of the button's label, see *Changing the appearance and text of a one-shot button label* on page 119.

8. If you want to change the background colour or image of the button, see *Changing the background colour or image of a one-shot button* on page 122.

> **Note:** You can configure the terminal to require a supervisor's authorisation to perform this button's function. See *Terminal setup screen - Security tab* on page 50.

9. Press anywhere on the Transaction screen to close the One-shot button screen.

10. Press Save.

    The one-shot buttons are saved.

Creating a one-shot button to reprint the last receipt

You can create a one-shot button to reprint the receipt of the last transaction that the terminal processed.

See *Reprinting the last receipt* on page 372.

> **Note:** This procedure creates a one-shot button that reprints the receipt of the last transaction finalised by the terminal. To create a button that prompts the operator to select which receipt to print, see *Creating a one-shot button to reprint a selected receipt* on page 253.

To create a one-shot button to reprint the last receipt:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

2. Press **Edit one-shot buttons**.

   One-shot button editing is enabled on the Transaction screen.

> **Note:** You cannot use one-shot buttons while editing is enabled, with the exception of buttons that open one-shot button pages. Save or cancel your changes if you want to use the buttons.

3. Press and hold where you want the one-shot button to be placed.

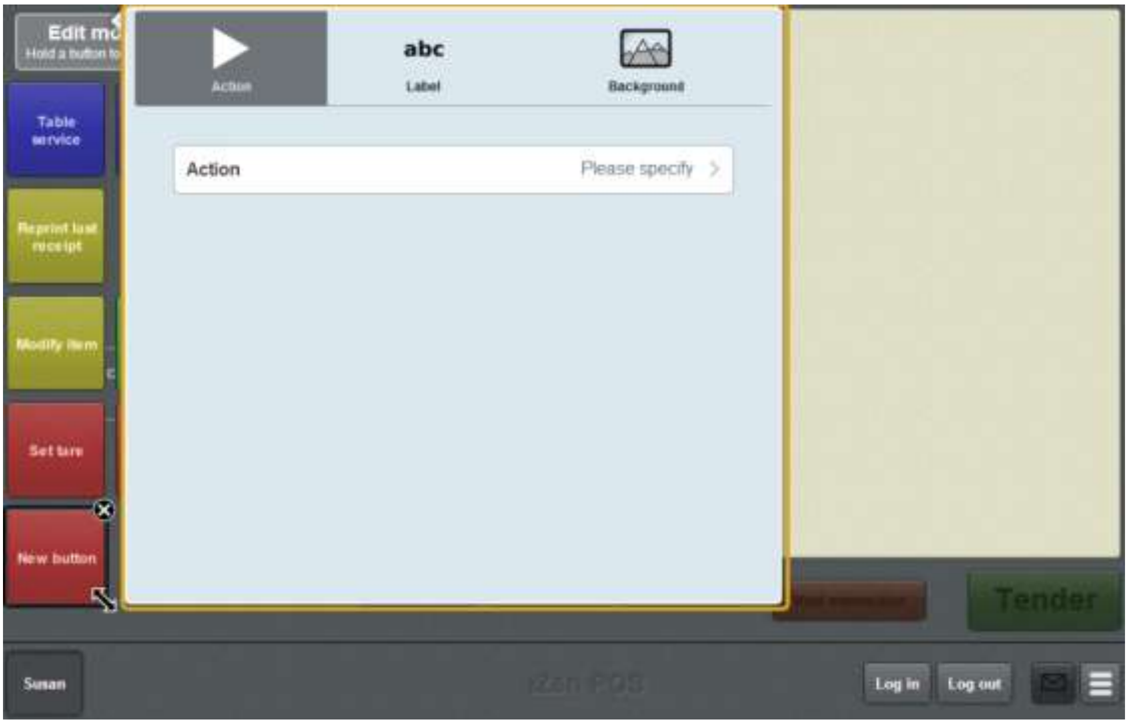
   The One-shot button screen is displayed.

> **Note**: The Point of Sale displays the most recently-viewed tab of the One-shot button screen. This is useful if you want to quickly edit the same attributes of multiple buttons.

> **Tip**: If you have already created a one-shot button, the Point of Sale matches the background and font of the closest one-shot button when creating a new button. If you need to create several buttons that look alike, create them near each other and then drag them to where you want them to appear.

4. Press ▶.

   The Action tab of the One-shot button screen is displayed.



5. Press **Action**.

   The list of available one-shot button actions is displayed.

6. Press **Reprint last receipt**.

   The button is configured to reprint the receipt of the last transaction the terminal processed.

7. If you want to change the appearance or text of the button's label, see *Changing the appearance and text of a one-shot button label* on page 119.

8. If you want to change the background colour or image of the button, see *Changing the background colour or image of a one-shot button* on page 122.

> **Note:** You can configure the terminal to require a supervisor's authorisation to perform this button's function. See *Terminal setup screen - Security tab* on page 50.

9. Press anywhere on the Transaction screen to close the One-shot button screen.

10. Press Save.

    The one-shot buttons are saved.

Creating a one-shot button to reprint orders

You can create a one-shot button to reprint a table's order.

See *Reprinting an order* on page 627.

To create a one-shot button to reprint an order:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

2. Press **Edit one-shot buttons**.

   One-shot button editing is enabled on the Transaction screen.

Note: You cannot use one-shot buttons while editing is enabled, with the exception of buttons that open one-shot button pages. Save or cancel your changes if you want to use the buttons.

3. Press and hold where you want the one-shot button to be placed.

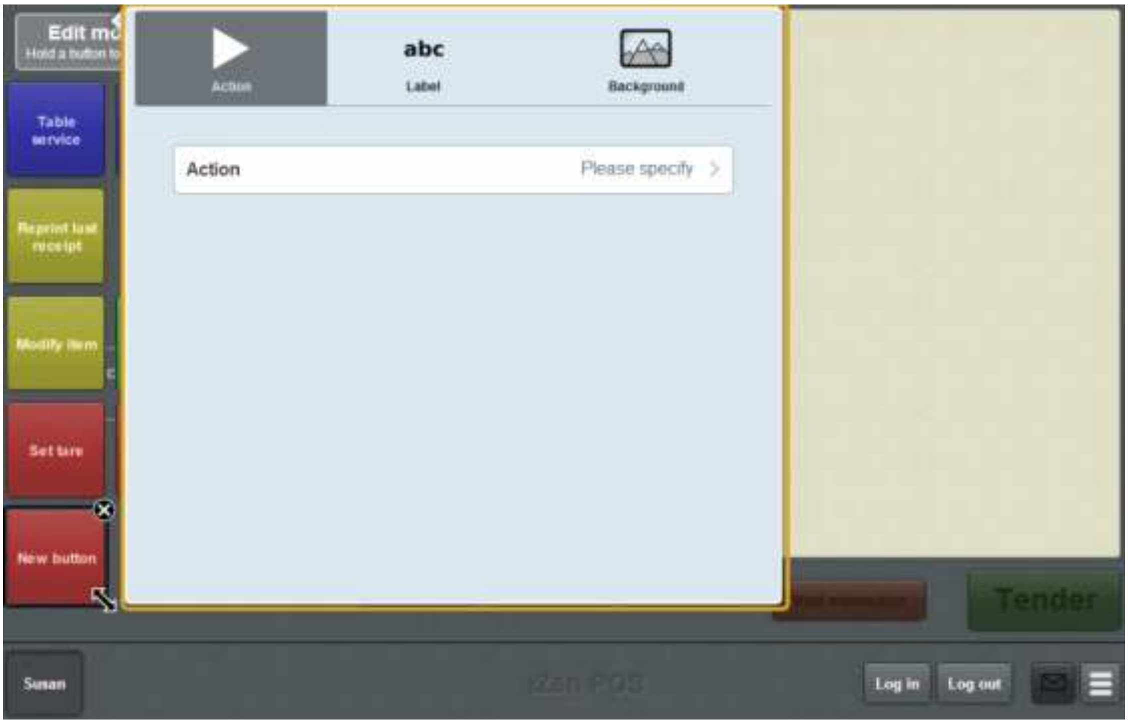
   The One-shot button screen is displayed.

Note: The Point of Sale displays the most recently-viewed tab of the One-shot button screen. This is useful if you want to quickly edit the same attributes of multiple buttons.

Tip: If you have already created a one-shot button, the Point of Sale matches the background and font of the closest one-shot button when creating a new button. If you need to create several buttons that look alike, create them near each other and then drag them to where you want them to appear.

4. Press ▶.

   The Action tab of the One-shot button screen is displayed.



5. Press **Action**.

   The list of available one-shot button actions is displayed.

6. Press **Reprint order**.

   The button is configured reprint a table order.

7. If you want to change the appearance or text of the button's label, see *Changing the appearance and text of a one-shot button label* on page 119.

8. If you want to change the background colour or image of the button, see *Changing the background colour or image of a one-shot button* on page 122.

> **Note:** You can configure the terminal to require a supervisor's authorisation to perform this button's function. See *Terminal setup screen - Security tab* on page 50.

9. Press anywhere on the Transaction screen to close the One-shot button screen.

10. Press Save.

    The one-shot buttons are saved.

Creating a one-shot button to reprint a selected receipt

You can create a one-shot button to reprint a transaction receipt from the last thirty days.

See *Reprinting a selected receipt* on page 373.

> **Note:** This procedure creates a one-shot button that prompts the operator to select which receipt to print. To create a button that reprints the receipt of the last transaction finalised by the terminal, see *Reprinting the last receipt* on page 372.

To create a one-shot button to reprint the a selected receipt:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

2. Press **Edit one-shot buttons**.

   One-shot button editing is enabled on the Transaction screen.

> **Note:** You cannot use one-shot buttons while editing is enabled, with the exception of buttons that open one-shot button pages. Save or cancel your changes if you want to use the buttons.

3. Press and hold where you want the one-shot button to be placed.

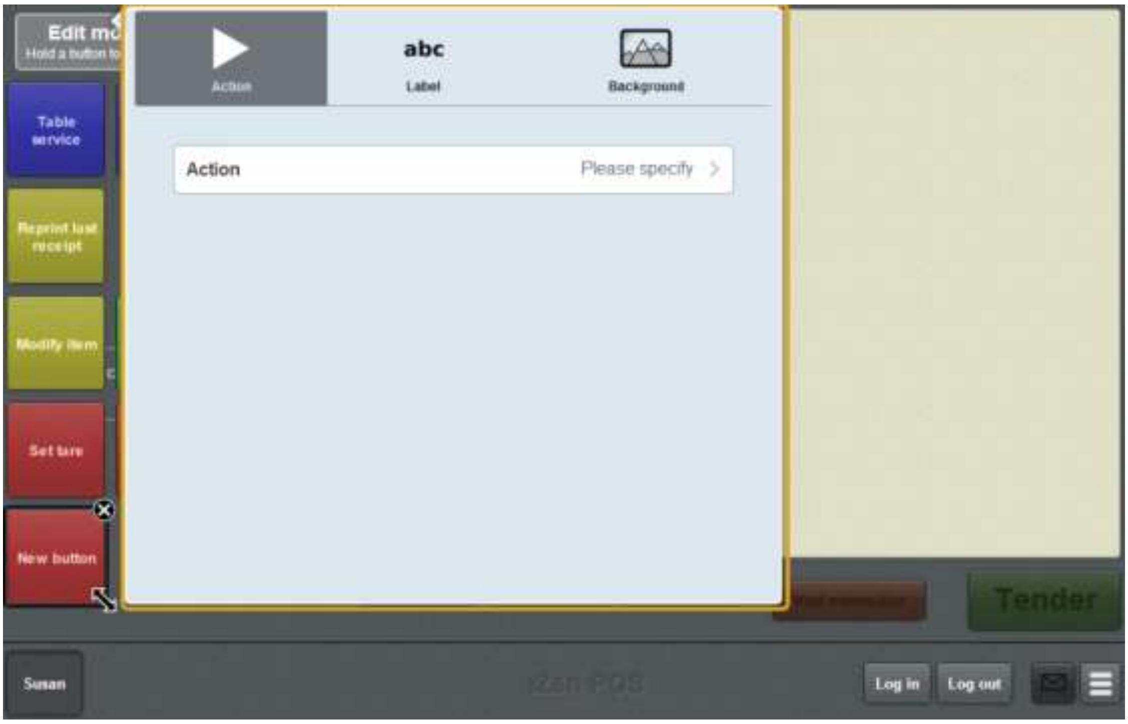
   The One-shot button screen is displayed.

> **Note**: The Point of Sale displays the most recently-viewed tab of the One-shot button screen. This is useful if you want to quickly edit the same attributes of multiple buttons.

> **Tip**: If you have already created a one-shot button, the Point of Sale matches the background and font of the closest one-shot button when creating a new button. If you need to create several buttons that look alike, create them near each other and then drag them to where you want them to appear.

4. Press ▶.

   The Action tab of the One-shot button screen is displayed.



5. Press **Action**.

   The list of available one-shot button actions is displayed.

6. Press **Reprint receipt**.

   The button is configured reprint a selected receipt from the last thirty days.

7. If you want to change the appearance or text of the button's label, see *Changing the appearance and text of a one-shot button label* on page 119.

8. If you want to change the background colour or image of the button, see *Changing the background colour or image of a one-shot button* on page 122.

> **Note:** You can configure the terminal to require a supervisor's authorisation to perform this button's function. See *Terminal setup screen - Security tab* on page 50.

9. Press anywhere on the Transaction screen to close the One-shot button screen.
10. Press Save.

    The one-shot buttons are saved.

Creating a one-shot button to retrieve a table

You can create a one-shot button to retrieve a table for table service. See *Waiting tables* on page 609.

Note: You must have tables configured in the Portal to be able to create one-shot buttons that retrieve tables.

To create a one-shot button to retrieve a table:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

2. Press **Edit one-shot buttons**.

   One-shot button editing is enabled on the Transaction screen.

> **Note:** You cannot use one-shot buttons while editing is enabled, with the exception of buttons that open one-shot button pages. Save or cancel your changes if you want to use the buttons.

3. Press and hold where you want the one-shot button to be placed.

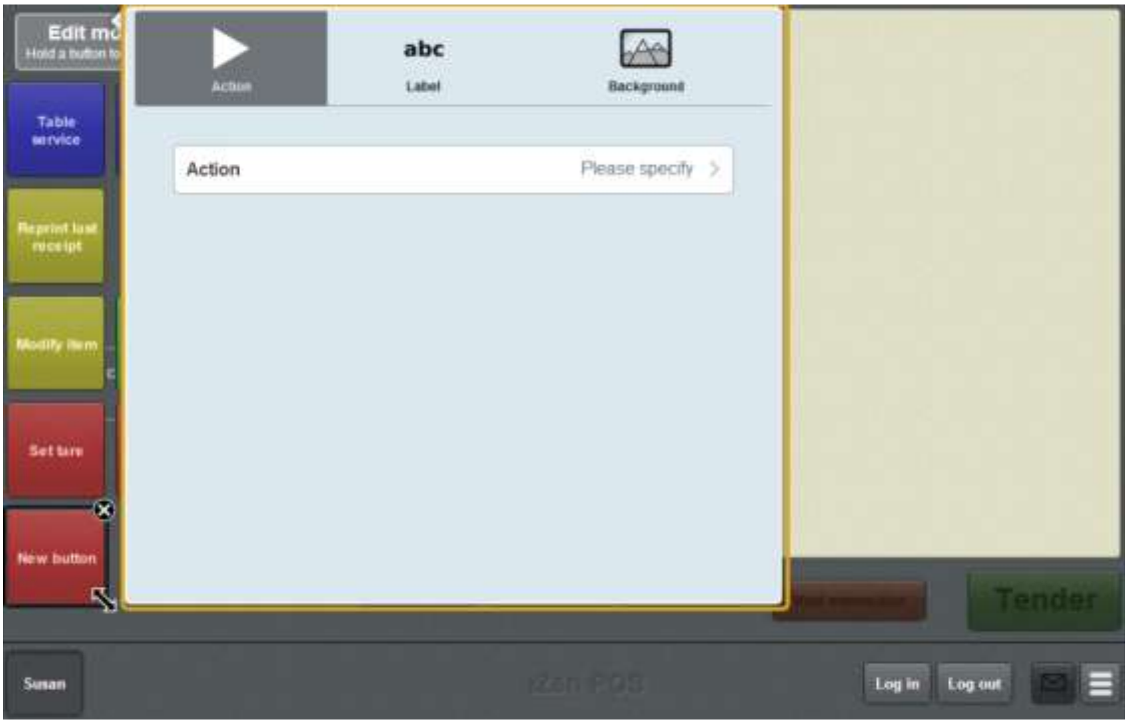
   The One-shot button screen is displayed.

> **Note**: The Point of Sale displays the most recently-viewed tab of the One-shot button screen. This is useful if you want to quickly edit the same attributes of multiple buttons.

> **Tip**: If you have already created a one-shot button, the Point of Sale matches the background and font of the closest one-shot button when creating a new button. If you need to create several buttons that look alike, create them near each other and then drag them to where you want them to appear.

4. Press ▶ .

   The Action tab of the One-shot button screen is displayed.

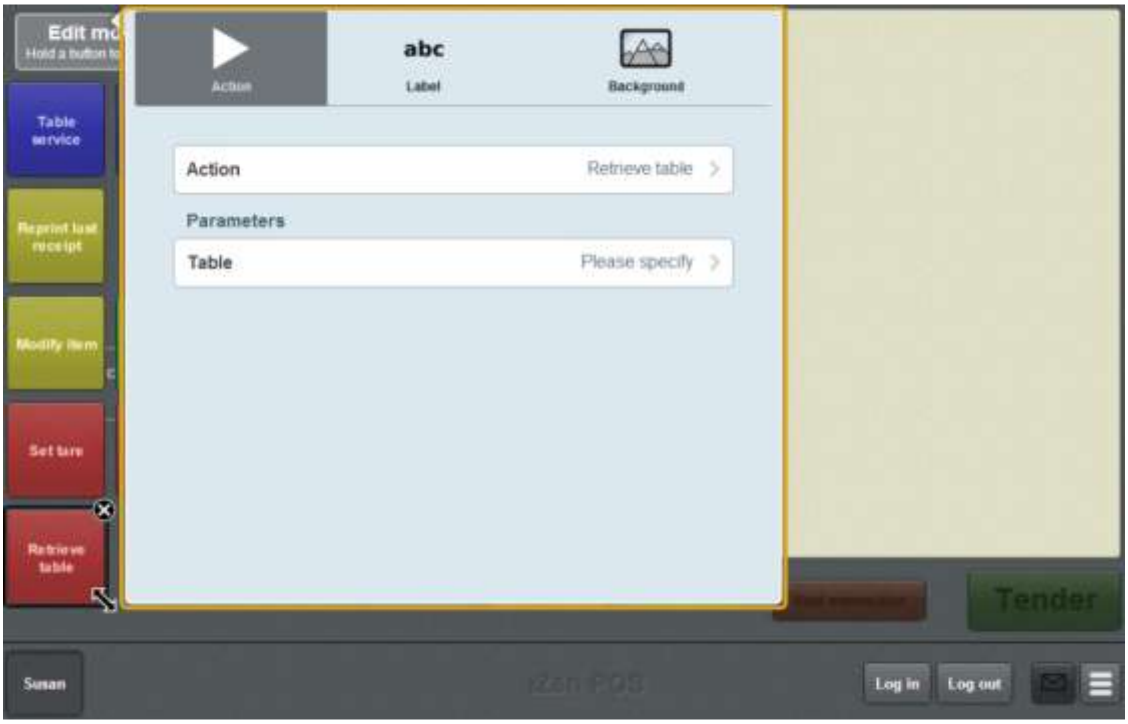


5. Press **Action**.

   The list of available one-shot button actions is displayed.

6. Press **Retrieve table**.

   The one-shot button is configured to retrieve a table.



Action Retrieve table

Parameters

Table Please specify

7. Press **Table**.

   The list of available tables in the Portal is displayed.

Balcony 1
Balcony 2
Balcony 3
Balcony 4
Indoor 1
Indoor 2
Indoor 3
Indoor 4

8. Select the table you want the button to represent.

   The one-shot button is configured to send and retrieve transactions to the specified table.

9. If you want to change the appearance or text of the button's label, see *Changing the appearance and text of a one-shot button label* on page 119.

10. If you want to change the background colour or image of the button, see *Changing the background colour or image of a one-shot button* on page 122.

Note: You can configure the terminal to require a supervisor's authorisation to perform this button's function. See *Terminal setup screen - Security tab* on page 50.

11. Press anywhere on the Transaction screen to close the One-shot button screen.

12. Press Save.

    The one-shot buttons are saved.

Creating a one-shot button to retrieve an external transaction

You can create a one-shot button to retrieve appointments from the Scheduler or the Portal and add them to the current transaction. See *Retrieving external transactions* on page 606.

> **Note**: The Point of Sale must be configured to connect to the Scheduler in order to be able to retrieve appointments.

To create a one-shot button to retrieve an appointment:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

2. Press **Edit one-shot buttons**.

   One-shot button editing is enabled on the Transaction screen.

Note: You cannot use one-shot buttons while editing is enabled, with the exception of buttons that open one-shot button pages. Save or cancel your changes if you want to use the buttons.

3. Press and hold where you want the one-shot button to be placed.

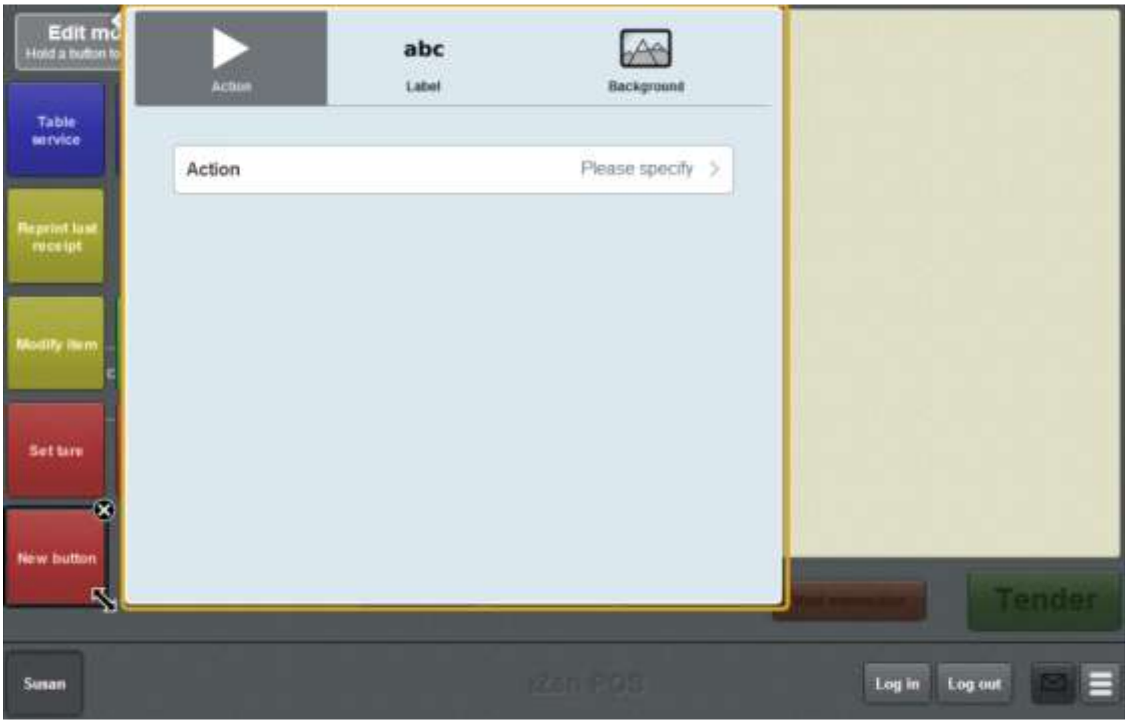
   The One-shot button screen is displayed.

Note: The Point of Sale displays the most recently-viewed tab of the One-shot button screen. This is useful if you want to quickly edit the same attributes of multiple buttons.

Tip: If you have already created a one-shot button, the Point of Sale matches the background and font of the closest one-shot button when creating a new button. If you need to create several buttons that look alike, create them near each other and then drag them to where you want them to appear.

4. Press ▶ .

   The Action tab of the One-shot button screen is displayed.



5. Press **Action**.

   The list of available one-shot button actions is displayed.

6. Press **Load external transaction**.
7. Press **Transaction source**.
8. Select either:
   - Scheduler to configure the button to retrieve appointments from the Scheduler.

     See *Setting up external transaction payments on the Point of Sale* on page 43.

   - Portal to configure the button to retrieve external transactions created on the Portal.

   The button is configured to retrieve external transactions.

9. If you want to change the appearance or text of the button's label, see *Changing the appearance and text of a one-shot button label* on page 119.
10. If you want to change the background colour or image of the button, see *Changing the background colour or image of a one-shot button* on page 122.

> **Note:** You can configure the terminal to require a supervisor's authorisation to perform this button's function. See *Terminal setup screen - Security tab* on page 50.

11. Press anywhere on the Transaction screen to close the One-shot button screen.
12. Press Save.

    The one-shot buttons are saved.

Creating a one-shot button to return a gift voucher

You can create a one-shot button to refund a gift voucher. You can specify which type of gift voucher can be returned by the button, and what amount is returned.

To create a one-shot button to refund a gift voucher:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

2. Press **Edit one-shot buttons**.

   One-shot button editing is enabled on the Transaction screen.

Note: You cannot use one-shot buttons while editing is enabled, with the exception of buttons that open one-shot button pages. Save or cancel your changes if you want to use the buttons.

3. Press and hold where you want the one-shot button to be placed.

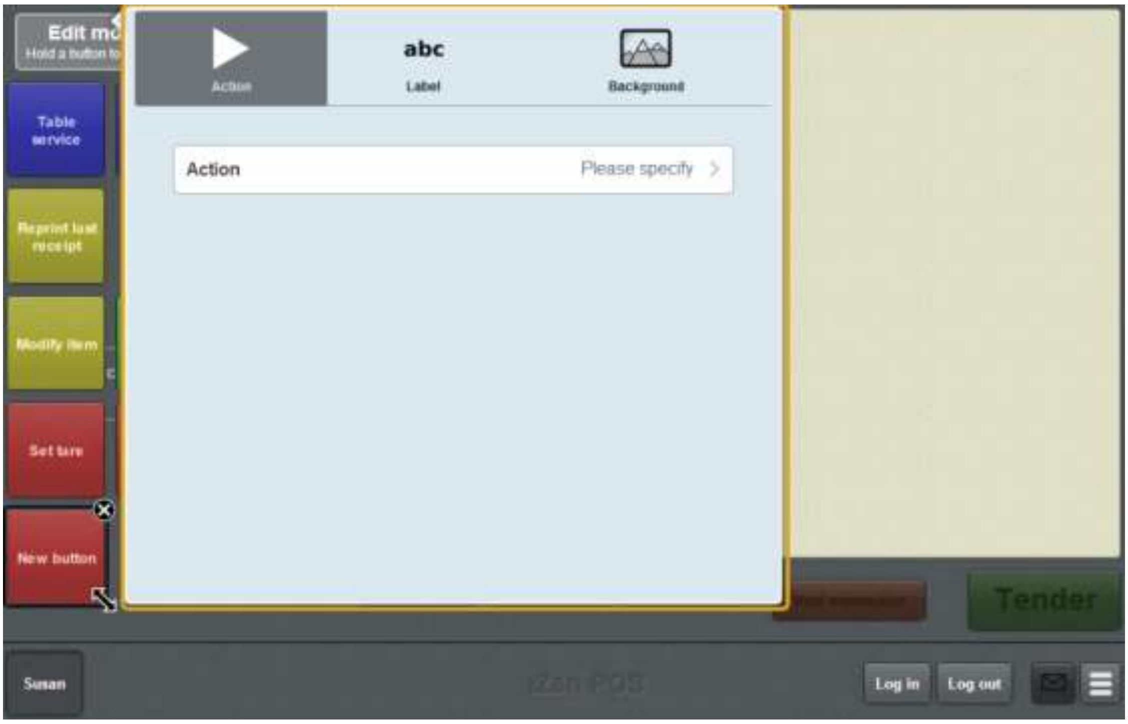
   The One-shot button screen is displayed.

Note: The Point of Sale displays the most recently-viewed tab of the One-shot button screen. This is useful if you want to quickly edit the same attributes of multiple buttons.

Tip: If you have already created a one-shot button, the Point of Sale matches the background and font of the closest one-shot button when creating a new button. If you need to create several buttons that look alike, create them near each other and then drag them to where you want them to appear.

4. Press ▶.

   The Action tab of the One-shot button screen is displayed.



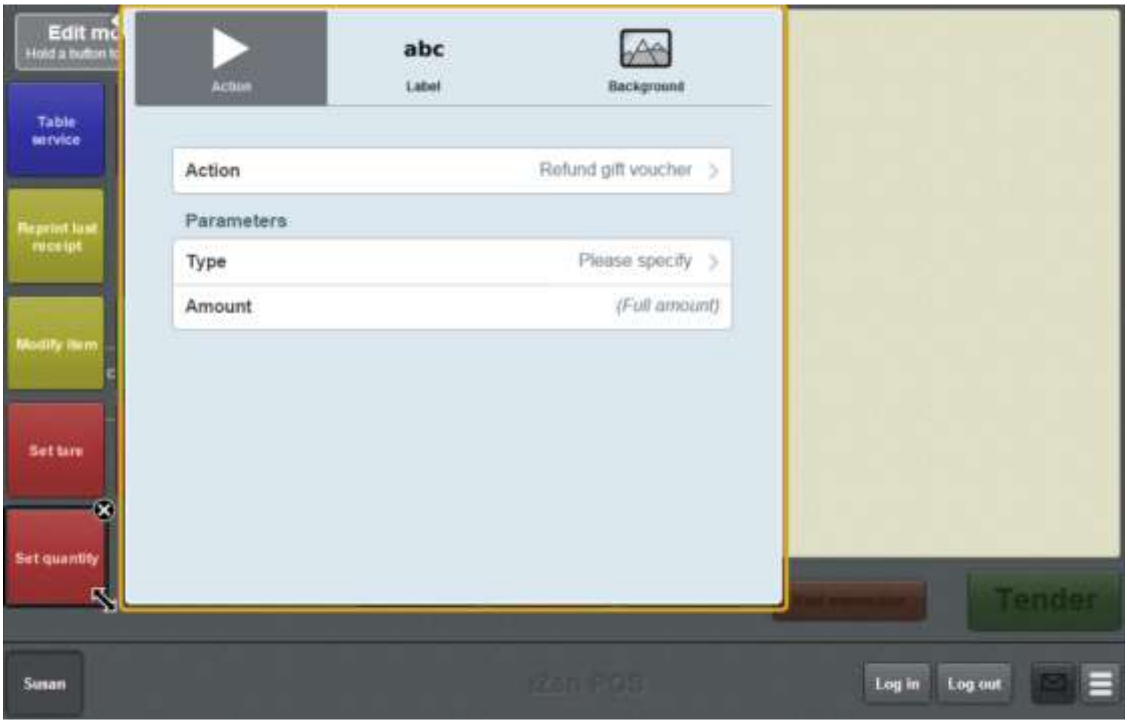
Action Please specify

5. Press **Action**.

   The list of available one-shot button actions is displayed.

6. Press **Refund voucher**.

   The button is configured to refund a gift voucher.



Action Refund gift voucher

Parameters

Type Please specify

Amount (Full amount)

7. Press **Type** and select the gift voucher type the button can refund.
8. If you want to refund the full amount of gift voucher, leave the **Amount** field blank.

> **Note:** Leaving the field blank prompts the operator to type in an amount. They can refund the full amount of the voucher by leaving the amount field blank, or type in another amount to refund.

9. If you want to refund a set amount, type the amount to be refunded in the **Amount** field.
10. If you want to change the appearance or text of the button's label, see *Changing the appearance and text of a one-shot button label* on page 119.
11. If you want to change the background colour or image of the button, see *Changing the background colour or image of a one-shot button* on page 122.

> **Note:** You can configure the terminal to require a supervisor's authorisation to perform this button's function. See *Terminal setup screen - Security tab* on page 50.

12. Press anywhere on the Transaction screen to close the One-shot button screen.
13. Press Save.

    The one-shot buttons are saved.

Creating a one-shot button to print sales reports

You can create a one-shot button to print the sales report from the base station.

See *Printing a sales report* on page 634.

To create a one-shot button to print a sales report:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

2. Press **Edit one-shot buttons**.

   One-shot button editing is enabled on the Transaction screen.

Note: You cannot use one-shot buttons while editing is enabled, with the exception of buttons that open one-shot button pages. Save or cancel your changes if you want to use the buttons.

3. Press and hold where you want the one-shot button to be placed.

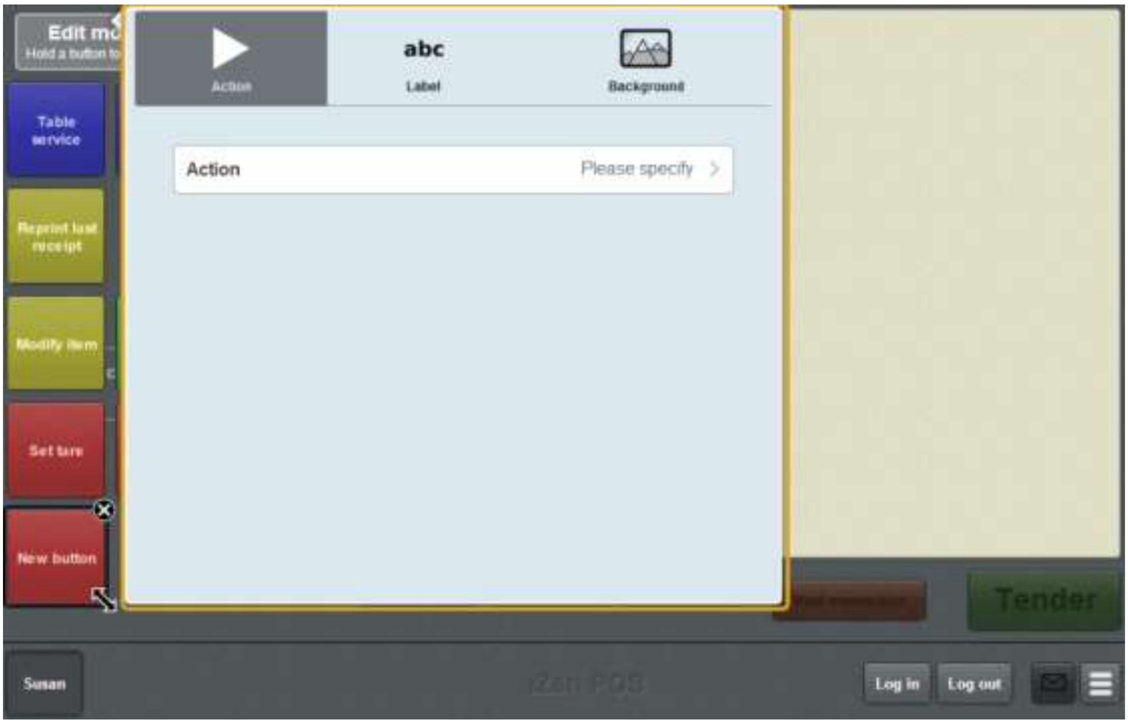
   The One-shot button screen is displayed.

Note: The Point of Sale displays the most recently-viewed tab of the One-shot button screen. This is useful if you want to quickly edit the same attributes of multiple buttons.

Tip: If you have already created a one-shot button, the Point of Sale matches the background and font of the closest one-shot button when creating a new button. If you need to create several buttons that look alike, create them near each other and then drag them to where you want them to appear.

4. Press ▶.

   The Action tab of the One-shot button screen is displayed.



5. Press **Action**.

   The list of available one-shot button actions is displayed.

6. Press **Print sales report**.

   The button is configured to print the sales report.

7. If you want to change the appearance or text of the button's label, see *Changing the appearance and text of a one-shot button label* on page 119.

8. If you want to change the background colour or image of the button, see *Changing the background colour or image of a one-shot button* on page 122.

> **Note:** You can configure the terminal to require a supervisor's authorisation to perform this button's function. See *Terminal setup screen - Security tab* on page 50.

9. Press anywhere on the Transaction screen to close the One-shot button screen.
10. Press Save.

    The one-shot buttons are saved.

Creating a one-shot button to print takings reports

You can create a one-shot button to print the takings report from the base station.

See *Printing a takings report* on page 636.

To create a one-shot button to print a takings report:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

2. Press **Edit one-shot buttons**.

   One-shot button editing is enabled on the Transaction screen.

Note: You cannot use one-shot buttons while editing is enabled, with the exception of buttons that open one-shot button pages. Save or cancel your changes if you want to use the buttons.

3. Press and hold where you want the one-shot button to be placed.

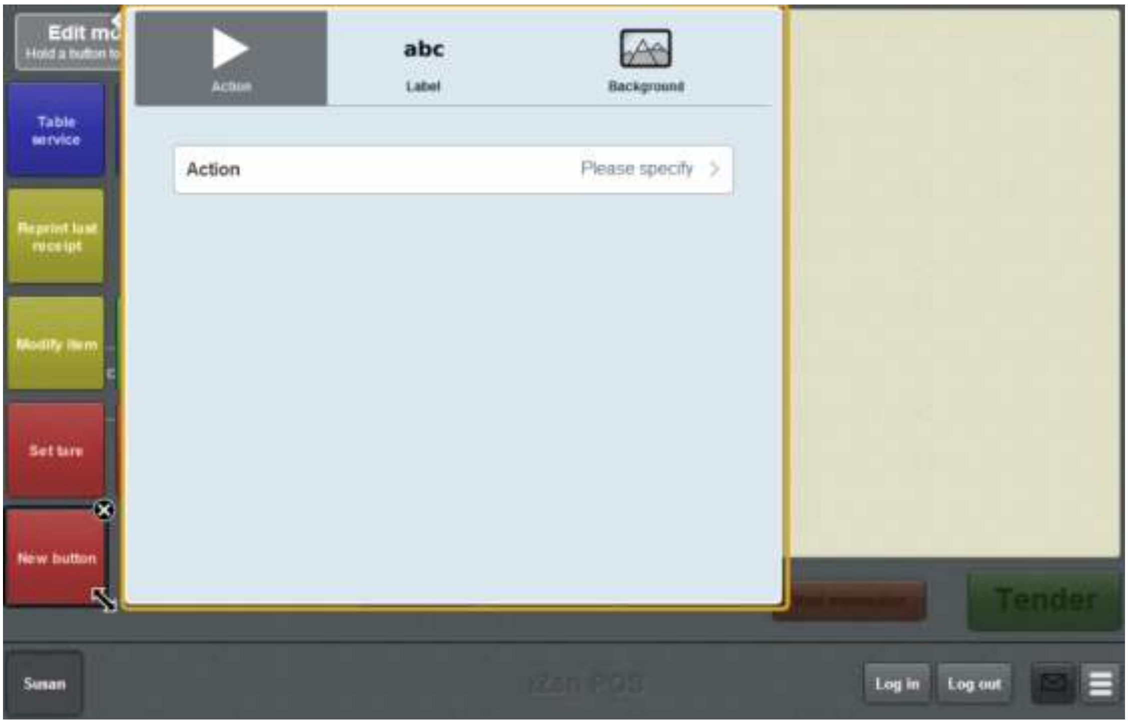
   The One-shot button screen is displayed.

Note: The Point of Sale displays the most recently-viewed tab of the One-shot button screen. This is useful if you want to quickly edit the same attributes of multiple buttons.

Tip: If you have already created a one-shot button, the Point of Sale matches the background and font of the closest one-shot button when creating a new button. If you need to create several buttons that look alike, create them near each other and then drag them to where you want them to appear.

4. Press ▶.

   The Action tab of the One-shot button screen is displayed.



5. Press **Action**.

   The list of available one-shot button actions is displayed.

6. Press **Print takings report**.

   The button is configured to print the takings report.

7. If you want to change the appearance or text of the button's label, see *Changing the appearance and text of a one-shot button label* on page 119.

8. If you want to change the background colour or image of the button, see *Changing the background colour or image of a one-shot button* on page 122.

Note: You can configure the terminal to require a supervisor's authorisation to perform this button's function. See *Terminal setup screen - Security tab* on page 50.

9. Press anywhere on the Transaction screen to close the One-shot button screen.

10. Press Save.

    The one-shot buttons are saved.

Creating a one-shot button to print time-hour reports

You can create a one-shot button to print a time-hour report from the base station.

See *Printing a time-hour report* on page 638.

To create a one-shot button to print a time-hour report:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

2. Press **Edit one-shot buttons**.

   One-shot button editing is enabled on the Transaction screen.

Note: You cannot use one-shot buttons while editing is enabled, with the exception of buttons that open one-shot button pages. Save or cancel your changes if you want to use the buttons.

3. Press and hold where you want the one-shot button to be placed.

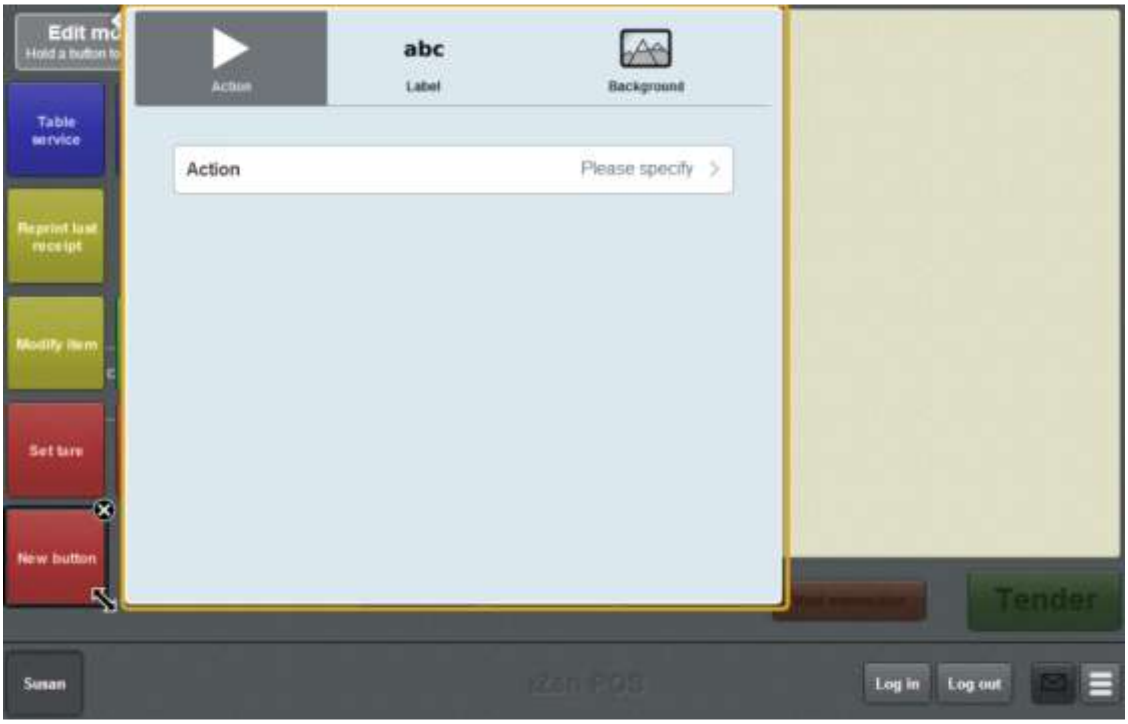
   The One-shot button screen is displayed.

Note: The Point of Sale displays the most recently-viewed tab of the One-shot button screen. This is useful if you want to quickly edit the same attributes of multiple buttons.

Tip: If you have already created a one-shot button, the Point of Sale matches the background and font of the closest one-shot button when creating a new button. If you need to create several buttons that look alike, create them near each other and then drag them to where you want them to appear.

4. Press ▶.

   The Action tab of the One-shot button screen is displayed.



5. Press **Action**.

   The list of available one-shot button actions is displayed.

6. Press **Print time-hour report**.

   The button is configured to print a time-hour report.

7. If you want to change the appearance or text of the button's label, see *Changing the appearance and text of a one-shot button label* on page 119.

8. If you want to change the background colour or image of the button, see *Changing the background colour or image of a one-shot button* on page 122.

Note: You can configure the terminal to require a supervisor's authorisation to perform this button's function. See *Terminal setup screen - Security tab* on page 50.

9. Press anywhere on the Transaction screen to close the One-shot button screen.

10. Press Save.

    The one-shot buttons are saved.

Creating a one-shot button to print the day's receipts

You can create a one-shot button to print all the receipts of a selected day.

To create a one-shot button to print the day's receipts:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

2. Press **Edit one-shot buttons**.

   One-shot button editing is enabled on the Transaction screen.

Note: You cannot use one-shot buttons while editing is enabled, with the exception of buttons that open one-shot button pages. Save or cancel your changes if you want to use the buttons.

3. Press and hold where you want the one-shot button to be placed.

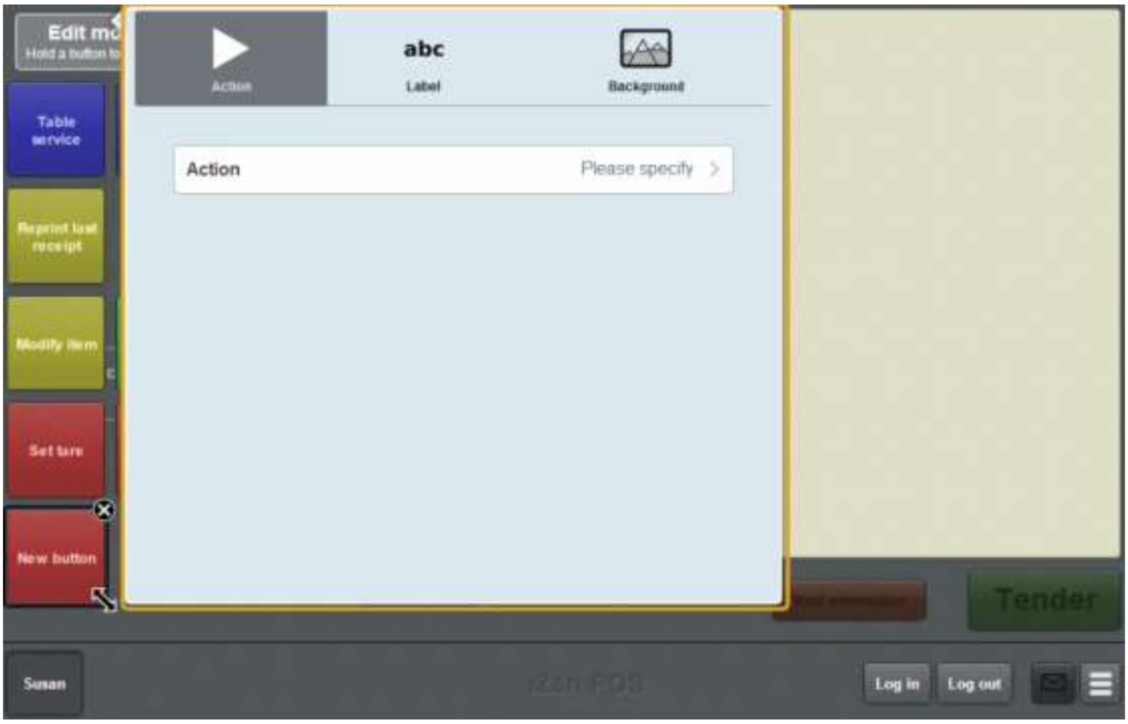
   The One-shot button screen is displayed.

Note: The Point of Sale displays the most recently-viewed tab of the One-shot button screen. This is useful if you want to quickly edit the same attributes of multiple buttons.

Tip: If you have already created a one-shot button, the Point of Sale matches the background and font of the closest one-shot button when creating a new button. If you need to create several buttons that look alike, create them near each other and then drag them to where you want them to appear.

4. Press ▶.

   The Action tab of the One-shot button screen is displayed.



5. Press **Action**.

   The list of available one-shot button actions is displayed.

6. Press **Print whole day's receipts**.

   The button is configured to print all the receipts made on the selected day.

7. If you want to change the appearance or text of the button's label, see *Changing the appearance and text of a one-shot button label* on page 119.

8. If you want to change the background colour or image of the button, see *Changing the background colour or image of a one-shot button* on page 122.

> **Note:** You can configure the terminal to require a supervisor's authorisation to perform this button's function. See *Terminal setup screen - Security tab* on page 50.

9. Press anywhere on the Transaction screen to close the One-shot button screen.
10. Press Save.

    The one-shot buttons are saved.

Creating a one-shot button to select a free or active table

You can create a one-shot button to select a table from a list of free or active tables. The one-shot button displays a page of tables that you can filter to either free or active tables.

To create a one-shot button to select a table:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

2. Press **Edit one-shot buttons**.

   One-shot button editing is enabled on the Transaction screen.

Note: You cannot use one-shot buttons while editing is enabled, with the exception of buttons that open one-shot button pages. Save or cancel your changes if you want to use the buttons.

3. Press and hold where you want the one-shot button to be placed.

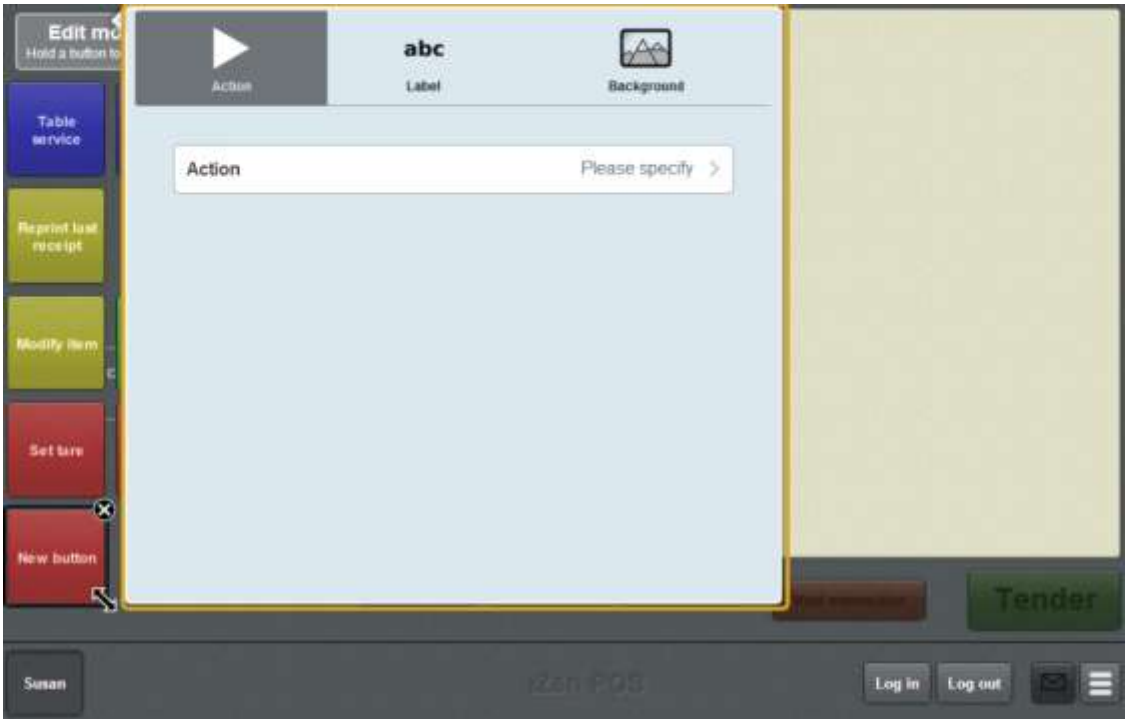
   The One-shot button screen is displayed.

Note: The Point of Sale displays the most recently-viewed tab of the One-shot button screen. This is useful if you want to quickly edit the same attributes of multiple buttons.

Tip: If you have already created a one-shot button, the Point of Sale matches the background and font of the closest one-shot button when creating a new button. If you need to create several buttons that look alike, create them near each other and then drag them to where you want them to appear.

4. Press ▶ .

   The Action tab of the One-shot button screen is displayed.



Action Please specify

5. Press **Action**.

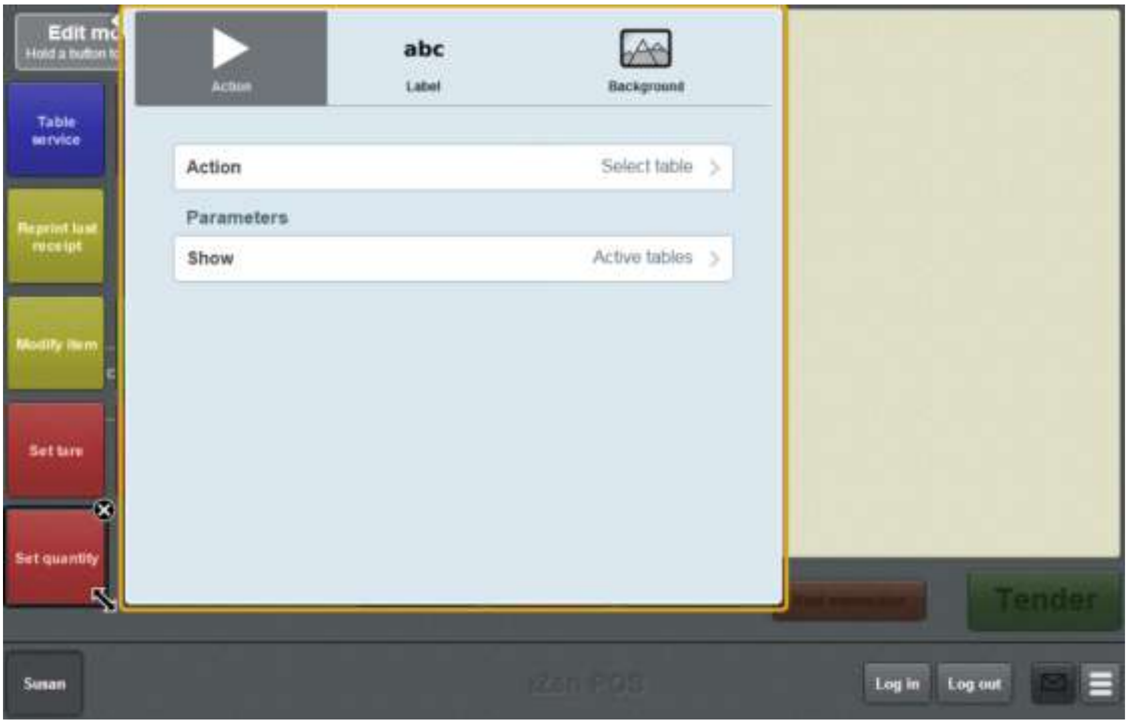
   The list of available one-shot button actions is displayed.

Action

- ✓ No action
- Advance
- Create order
- Customer enquiry
- Customer payment
- Edit one-shot buttons
- Find order
- Gift voucher

6. Press **Select table**.

   The button is configured to select an active or free table.



Action: Select table

Parameters

Show: Active tables

7. Press **Show**.

   The sub menu is displayed.

8. Select whether the page should display:
   - **Free tables**, that do not currently have customers.
   - **Active tables**, that currently have customers.
   - Whichever status was selected when the select table page was last open.

9. If you want to change the appearance or text of the button's label, see *Changing the appearance and text of a one-shot button label* on page 119.
10. If you want to change the background colour or image of the button, see *Changing the background colour or image of a one-shot button* on page 122.

> **Note:** You can configure the terminal to require a supervisor's authorisation to perform this button's function. See *Terminal setup screen - Security tab* on page 50.

11. Press anywhere on the Transaction screen to close the One-shot button screen.
12. Press Save.

    The one-shot buttons are saved.

Creating a one-shot button to set a transaction type

You can create a one-shot button to set whether the current transaction is dine in, take away or non-table service. The Point of Sale offers two types of table service transactions in case you want to use different settings for each. The two table-service transaction types are identical in every other way.

The Point of Sale offers three transaction types:

- Non-table, used for register transactions that do not send items to the kitchen.
- Take away, used for one configuration of table-service settings.
- Dine in, used for an optional second configuration of table-service settings.

The transaction type of a transaction cannot be changed once items have been sent to the kitchen.

> **Note:** Transaction type one-shot buttons perform the same function as the transaction type selection buttons for the table list page. See *Selecting a table* on page 614.

To create a one-shot button to select a table type:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

2. Press **Edit one-shot buttons**.

   One-shot button editing is enabled on the Transaction screen.

Note: You cannot use one-shot buttons while editing is enabled, with the exception of buttons that open one-shot button pages. Save or cancel your changes if you want to use the buttons.

3. Press and hold where you want the one-shot button to be placed.

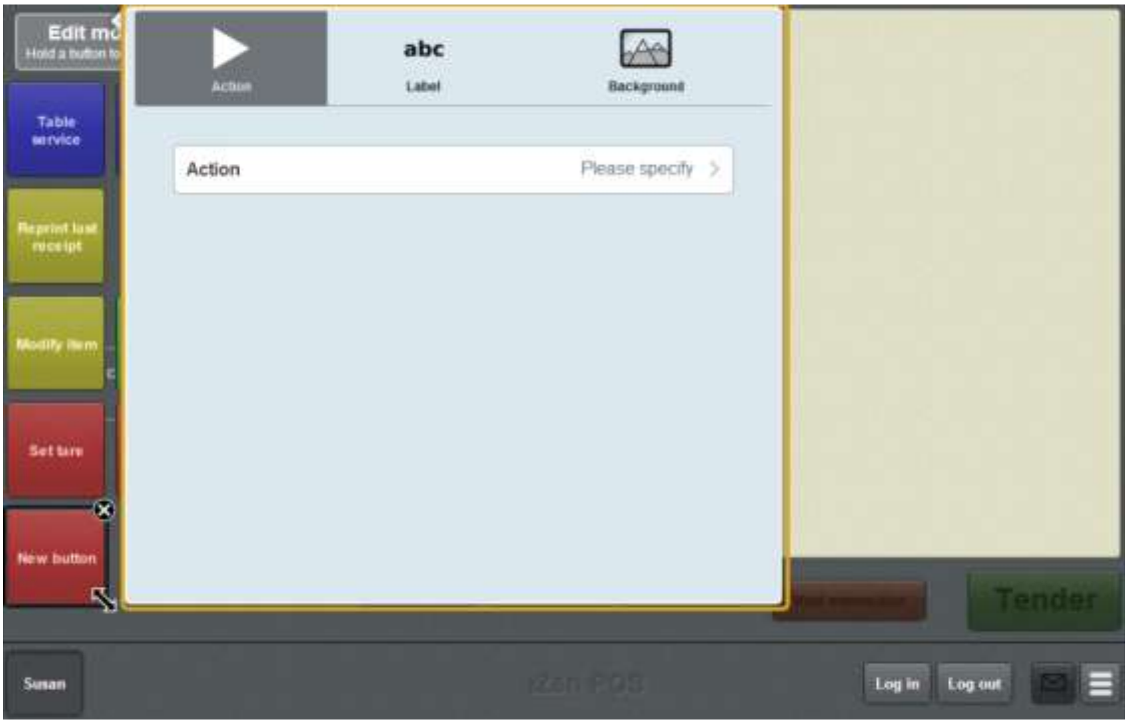
   The One-shot button screen is displayed.

Note: The Point of Sale displays the most recently-viewed tab of the One-shot button screen. This is useful if you want to quickly edit the same attributes of multiple buttons.

Tip: If you have already created a one-shot button, the Point of Sale matches the background and font of the closest one-shot button when creating a new button. If you need to create several buttons that look alike, create them near each other and then drag them to where you want them to appear.

4. Press ▶ .

   The Action tab of the One-shot button screen is displayed.

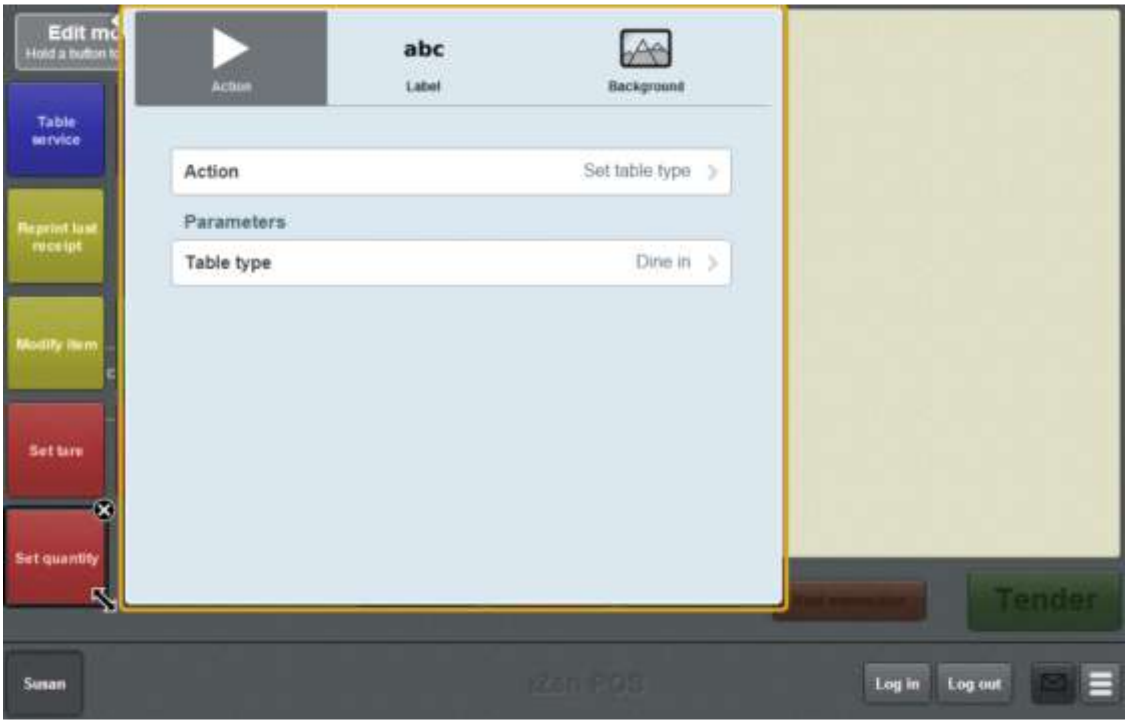


5. Press **Action**.

   The list of available one-shot button actions is displayed.

6. Press **Set transaction type**.

   The button is configured to set a transaction type



Action Set table type

Parameters

Table type Dine in

7. Press **Table type** and select whether to set the table to **Dine in**, **Take away** or **None**.
8. If you want to change the appearance or text of the button's label, see *Changing the appearance and text of a one-shot button label* on page 119.
9. If you want to change the background colour or image of the button, see *Changing the background colour or image of a one-shot button* on page 122.
10. Press anywhere on the Transaction screen to close the One-shot button screen.
11. Press Save.

    The one-shot buttons are saved.

Creating a one-shot button to display an external web page

You can create a one-shot button to display an external web page on top of the Point of Sale. The button must be configured to a specific web page, as the display window does not provide a browser search or address bar.

> **The web page doesn't load:** Some web pages do not allow this kind of access. For example, google's search engine cannot be loaded within the Point of Sale. If a blank page is displayed, the web page you have selected cannot be loaded within the Point of Sale.

To create a one-shot button to display an external web page:

1. From the Transction screen, press ☰.

   The Point of Sale menu is displayed.

2. Press **Edit one-shot buttons**.

   One-shot button editing is enabled on the Transaction screen.

> **Note:** You cannot use one-shot buttons while editing is enabled, with the exception of buttons that open one-shot button pages. Save or cancel your changes if you want to use the buttons.

3. Press and hold where you want the one-shot button to be placed.

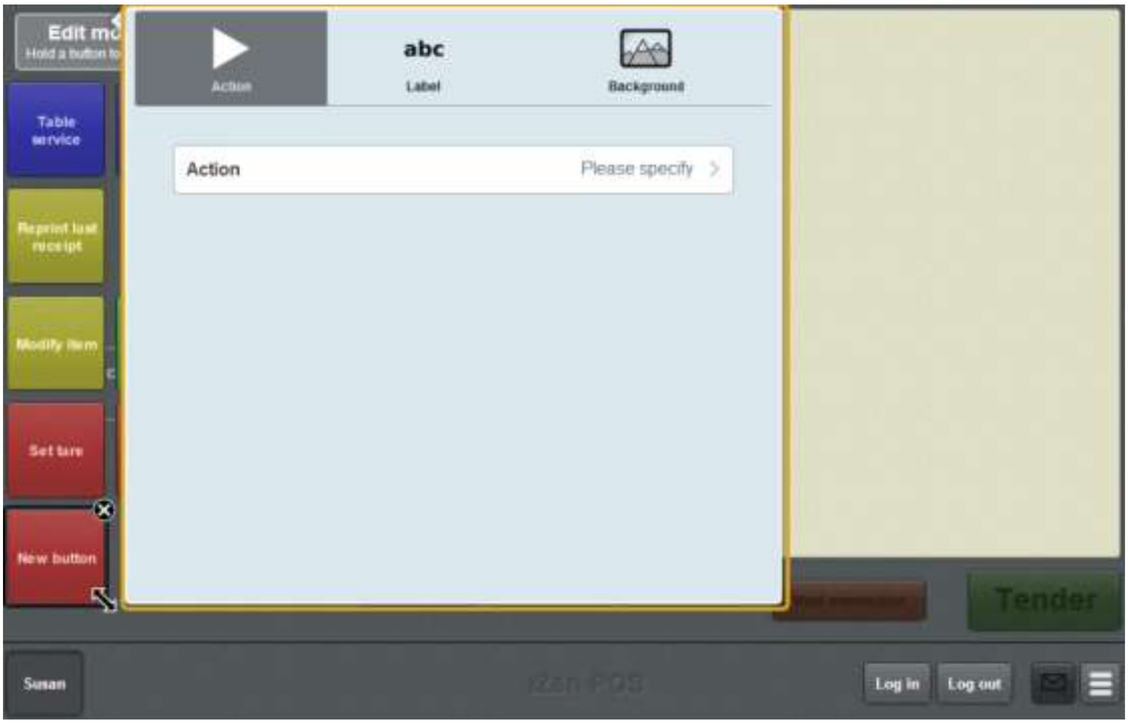
   The One-shot button screen is displayed.

> **Note**: The Point of Sale displays the most recently-viewed tab of the One-shot button screen. This is useful if you want to quickly edit the same attributes of multiple buttons.

> **Tip**: If you have already created a one-shot button, the Point of Sale matches the background and font of the closest one-shot button when creating a new button. If you need to create several buttons that look alike, create them near each other and then drag them to where you want them to appear.

4. Press ▶ .

   The Action tab of the One-shot button screen is displayed.

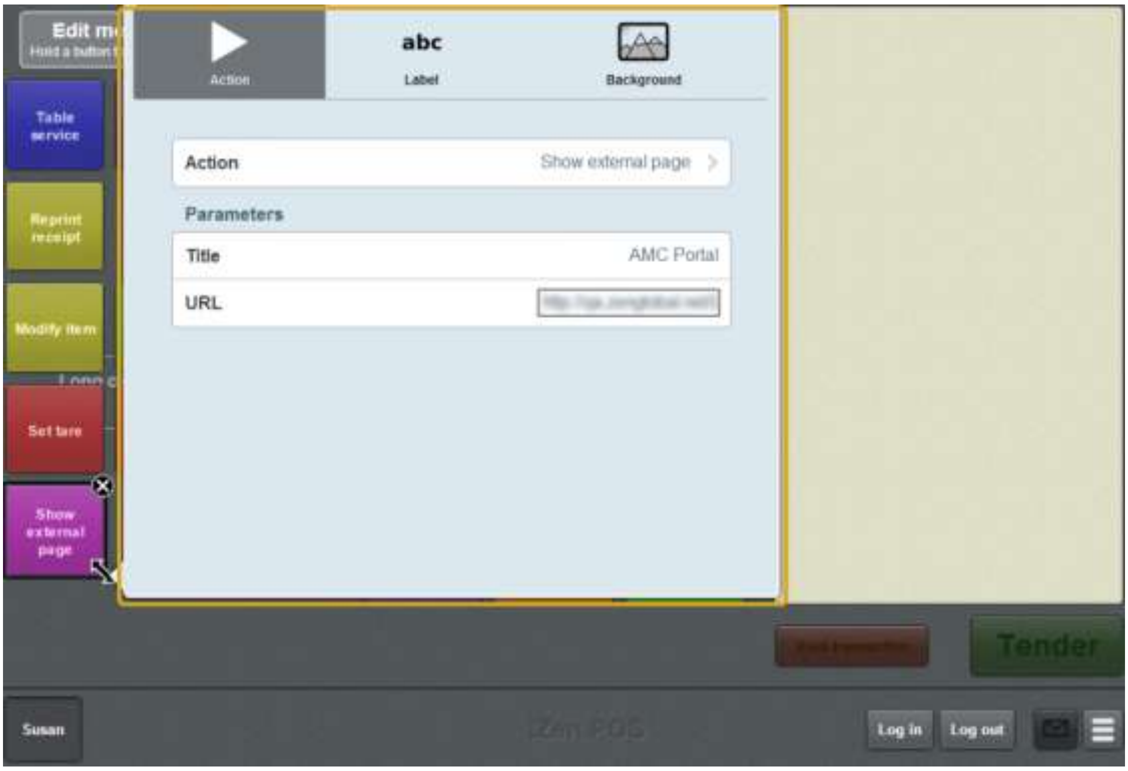


5. Press **Action**.

   The list of available one-shot button actions is displayed.

6. Press **Show external page**.

   The button is configured to display a web page.



Action Show external page

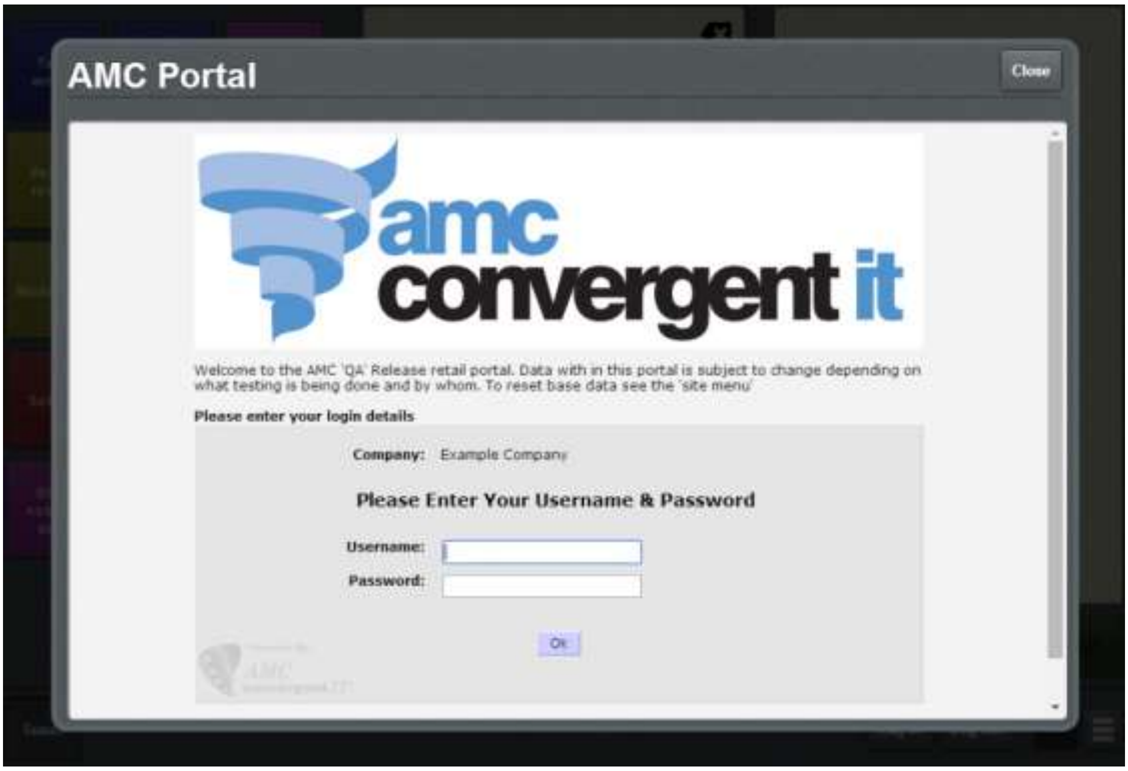
Parameters

Title AMC Portal

URL

7. Press **Title**.
8. Type the title you want displayed above the web page.
9. Press **URL**.
10. Type the URL of the page you want displayed.

    The button is configured to display the specified web page under the title.



Welcome to the AMC 'QA' Release retail portal. Data with in this portal is subject to change depending on what testing is being done and by whom. To reset base data see the 'site menu'

Please enter your login details

Company: Example Company

Please Enter Your Username & Password

Username:

Password:

11. If you want to change the appearance or text of the button's label, see *Changing the appearance and text of a one-shot button label* on page 119.
12. If you want to change the background colour or image of the button, see *Changing the background colour or image of a one-shot button* on page 122.

> **Note:** You can configure the terminal to require a supervisor's authorisation to perform this button's function. See *Terminal setup screen - Security tab* on page 50.

13. Press anywhere on the Transaction screen to close the One-shot button screen.
14. Press Save.

    The one-shot buttons are saved.

Create a one-shot button to tare the scale

You can create a one-shot button to override the tare of the scale for the current item if the item's package weight is different to the norm.

See *Taring the scale* on page 418.

To create a one-shot button to tare the scale:

1. From the Transaction screen, press .

   The Point of Sale menu is displayed.

2. Press **Edit one-shot buttons**.

   One-shot button editing is enabled on the Transaction screen.

Note: You cannot use one-shot buttons while editing is enabled, with the exception of buttons that open one-shot button pages. Save or cancel your changes if you want to use the buttons.

3. Press and hold where you want the one-shot button to be placed.

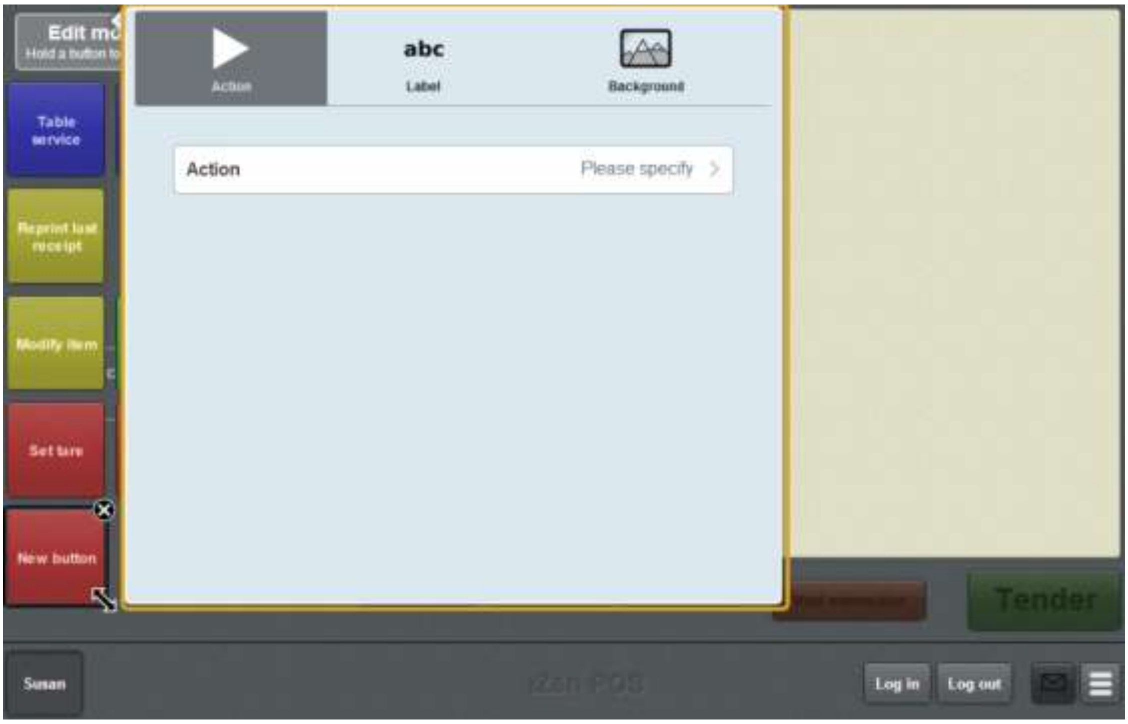
   The One-shot button screen is displayed.

Note: The Point of Sale displays the most recently-viewed tab of the One-shot button screen. This is useful if you want to quickly edit the same attributes of multiple buttons.

Tip: If you have already created a one-shot button, the Point of Sale matches the background and font of the closest one-shot button when creating a new button. If you need to create several buttons that look alike, create them near each other and then drag them to where you want them to appear.

4. Press ▶.

   The Action tab of the One-shot button screen is displayed.



Action Please specify

5. Press **Action**.

   The list of available one-shot button actions is displayed.

6. Press **Set tare**.

   The button is configured to tare the scale for the current weighed item.

7. If you want to change the appearance or text of the button's label, see *Changing the appearance and text of a one-shot button label* on page 119.

8. If you want to change the background colour or image of the button, see *Changing the background colour or image of a one-shot button* on page 122.

Note: You can configure the terminal to require a supervisor's authorisation to perform this button's function. See *Terminal setup screen - Security tab* on page 50.

9. Press anywhere on the Transaction screen to close the One-shot button screen.
10. Press Save.

    The one-shot buttons are saved.

Creating a one-shot button to enter and exit training mode

You can create a one-shot button to turn training mode on or off on the terminal. Training mode allows staff members to practise transactions without creating sale logs on the Portal or opening the cash drawer.

> **Note:** This button functions like a toggle switch: if training mode is not enabled, the button turns training mode on. If training mode is enabled, the button turns training mode off.

See *Using the terminal training mode* on page 389.

To create a one-shot button to enter and exit training mode:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

2. Press **Edit one-shot buttons**.

   One-shot button editing is enabled on the Transaction screen.

Note: You cannot use one-shot buttons while editing is enabled, with the exception of buttons that open one-shot button pages. Save or cancel your changes if you want to use the buttons.

3. Press and hold where you want the one-shot button to be placed.

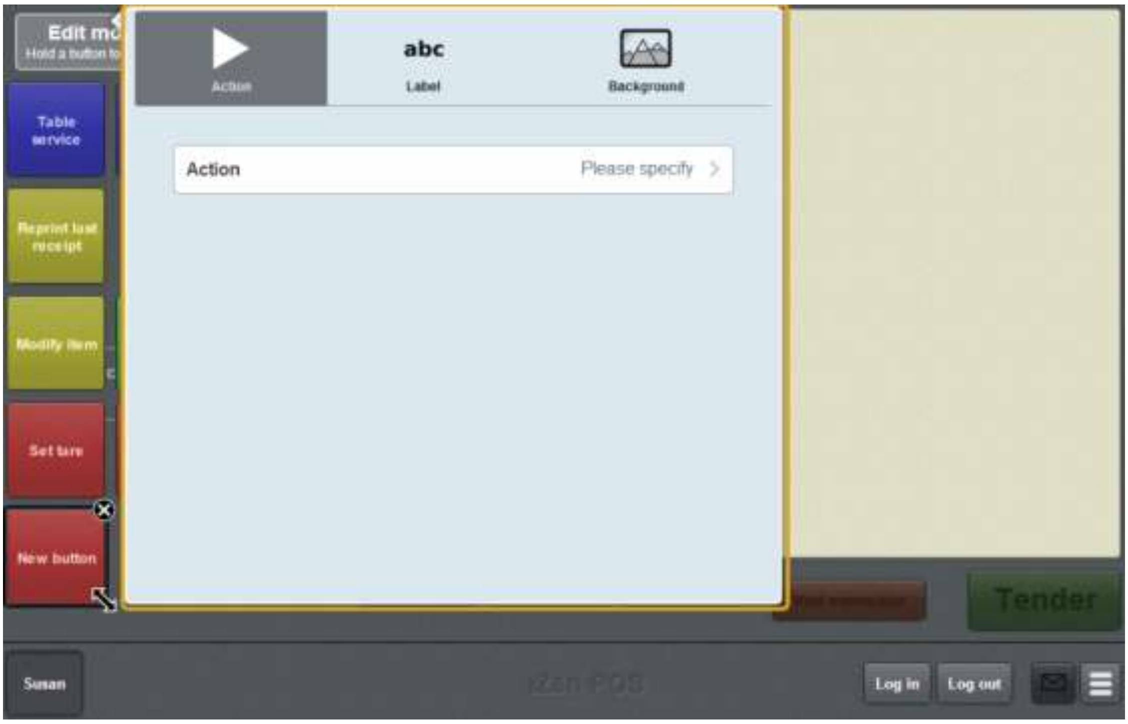
   The One-shot button screen is displayed.

Note: The Point of Sale displays the most recently-viewed tab of the One-shot button screen. This is useful if you want to quickly edit the same attributes of multiple buttons.

Tip: If you have already created a one-shot button, the Point of Sale matches the background and font of the closest one-shot button when creating a new button. If you need to create several buttons that look alike, create them near each other and then drag them to where you want them to appear.

4. Press ▶ .

   The Action tab of the One-shot button screen is displayed.



5. Press **Action**.

   The list of available one-shot button actions is displayed.

6. Press **Training mode**.

   The button is configured to turn training mode on or off.

7. If you want to change the appearance or text of the button's label, see *Changing the appearance and text of a one-shot button label* on page 119.

8. If you want to change the background colour or image of the button, see *Changing the background colour or image of a one-shot button* on page 122.

Note: You can configure the terminal to require a supervisor's authorisation to perform this button's function. See *Terminal setup screen - Security tab* on page 50.

9. Press anywhere on the Transaction screen to close the One-shot button screen.
10. Press Save.

    The one-shot buttons are saved.

Creating a one-shot button to make a transaction exempt from tax

You can create a one-shot button to make a transaction exempt from tax. The button removes all tax from a transaction.

> **Note:** Setting a transaction as tax exempt requires the customer provide their Tax Exempt ID during the tender process. See *Recording a tax exempt ID during tender* on page 500.

To create a one-shot button to make an item exempt from tax:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

2. Press **Edit one-shot buttons**.

   One-shot button editing is enabled on the Transaction screen.

Note: You cannot use one-shot buttons while editing is enabled, with the exception of buttons that open one-shot button pages. Save or cancel your changes if you want to use the buttons.

3. Press and hold where you want the one-shot button to be placed.

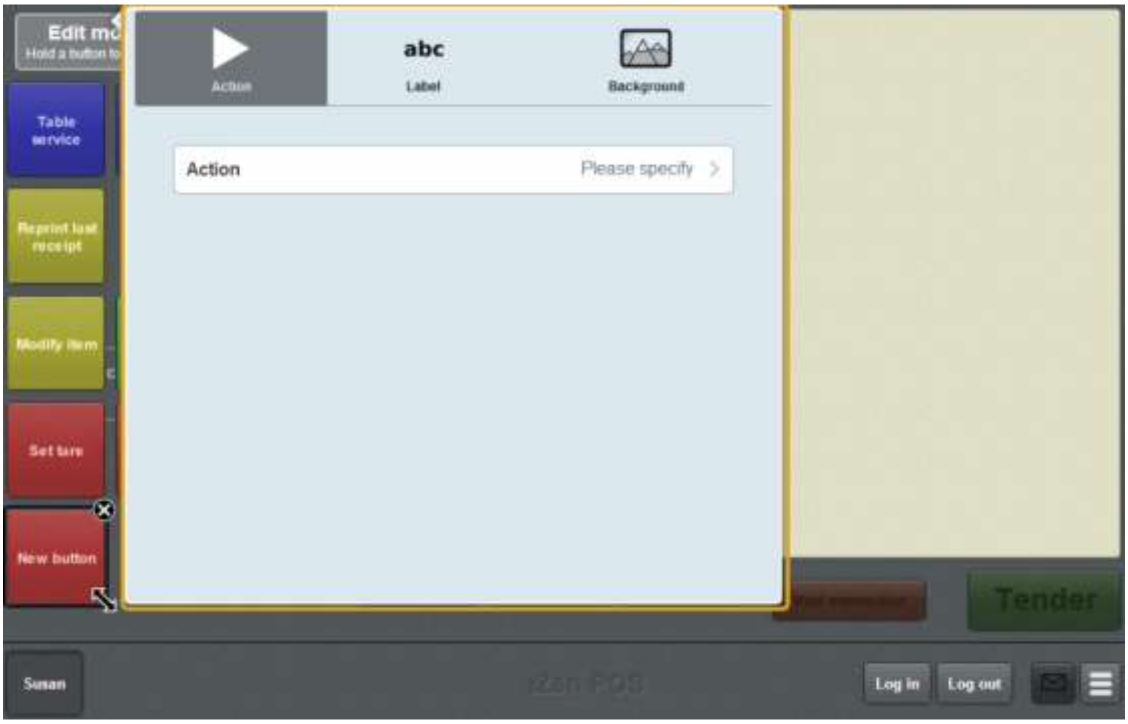
   The One-shot button screen is displayed.

Note: The Point of Sale displays the most recently-viewed tab of the One-shot button screen. This is useful if you want to quickly edit the same attributes of multiple buttons.

Tip: If you have already created a one-shot button, the Point of Sale matches the background and font of the closest one-shot button when creating a new button. If you need to create several buttons that look alike, create them near each other and then drag them to where you want them to appear.

4. Press ▶.

   The Action tab of the One-shot button screen is displayed.



5. Press **Action**.

   The list of available one-shot button actions is displayed.

6. Press **Tax exempt**.

   The button is configured to make the selected item tax exempt.

7. If you want to change the appearance or text of the button's label, see *Changing the appearance and text of a one-shot button label* on page 119.

8. If you want to change the background colour or image of the button, see *Changing the background colour or image of a one-shot button* on page 122.

> **Note:** You can configure the terminal to require a supervisor's authorisation to perform this button's function. See *Terminal setup screen - Security tab* on page 50.

9. Press anywhere on the Transaction screen to close the One-shot button screen.
10. Press Save.

    The one-shot buttons are saved.

Creating a one-shot button to perform X reads

You can create a one-shot button to perform an X read on the cash-drawer that the terminal is connected to.

See *Performing an X read* on page 383.

To create a one-shot button to perform an X read:

1. From the Transaction screen, press .

   The Point of Sale menu is displayed.

2. Press **Edit one-shot buttons**.

   One-shot button editing is enabled on the Transaction screen.

Note: You cannot use one-shot buttons while editing is enabled, with the exception of buttons that open one-shot button pages. Save or cancel your changes if you want to use the buttons.

3. Press and hold where you want the one-shot button to be placed.

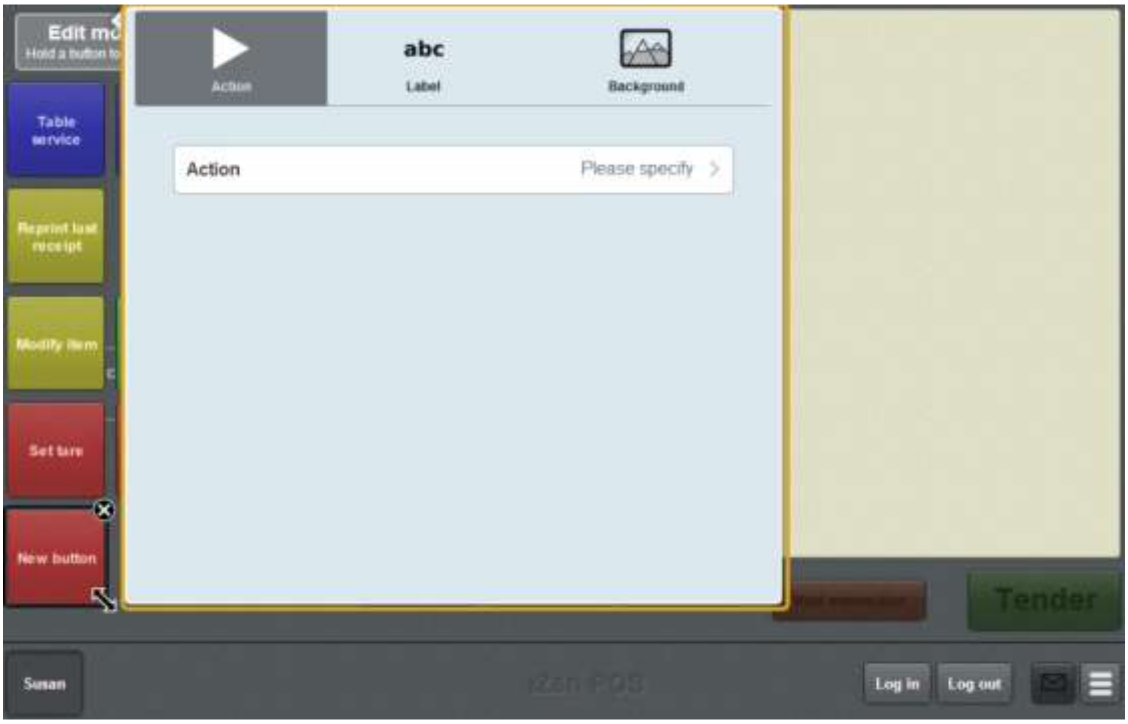
   The One-shot button screen is displayed.

Note: The Point of Sale displays the most recently-viewed tab of the One-shot button screen. This is useful if you want to quickly edit the same attributes of multiple buttons.

Tip: If you have already created a one-shot button, the Point of Sale matches the background and font of the closest one-shot button when creating a new button. If you need to create several buttons that look alike, create them near each other and then drag them to where you want them to appear.

4. Press ▶ .

   The Action tab of the One-shot button screen is displayed.



5. Press **Action**.

   The list of available one-shot button actions is displayed.

6. Press **X Read**.

   The button is configured to perform an X read on the cash-drawer the terminal is connected to.

7. If you want to change the appearance or text of the button's label, see *Changing the appearance and text of a one-shot button label* on page 119.

8. If you want to change the background colour or image of the button, see *Changing the background colour or image of a one-shot button* on page 122.

Note: You can configure the terminal to require a supervisor's authorisation to perform this button's function. See *Terminal setup screen - Security tab* on page 50.

9. Press anywhere on the Transaction screen to close the One-shot button screen.
10. Press Save.

    The one-shot buttons are saved.

Creating a one-shot button to perform Z reads

You can create a one-shot button to perform a Z read on the cash-drawer that the terminal is connected to.

See *Performing a Z read* on page 385.

To create a one-shot button to perform a Z read:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

2. Press **Edit one-shot buttons**.

   One-shot button editing is enabled on the Transaction screen.

Note: You cannot use one-shot buttons while editing is enabled, with the exception of buttons that open one-shot button pages. Save or cancel your changes if you want to use the buttons.

3. Press and hold where you want the one-shot button to be placed.

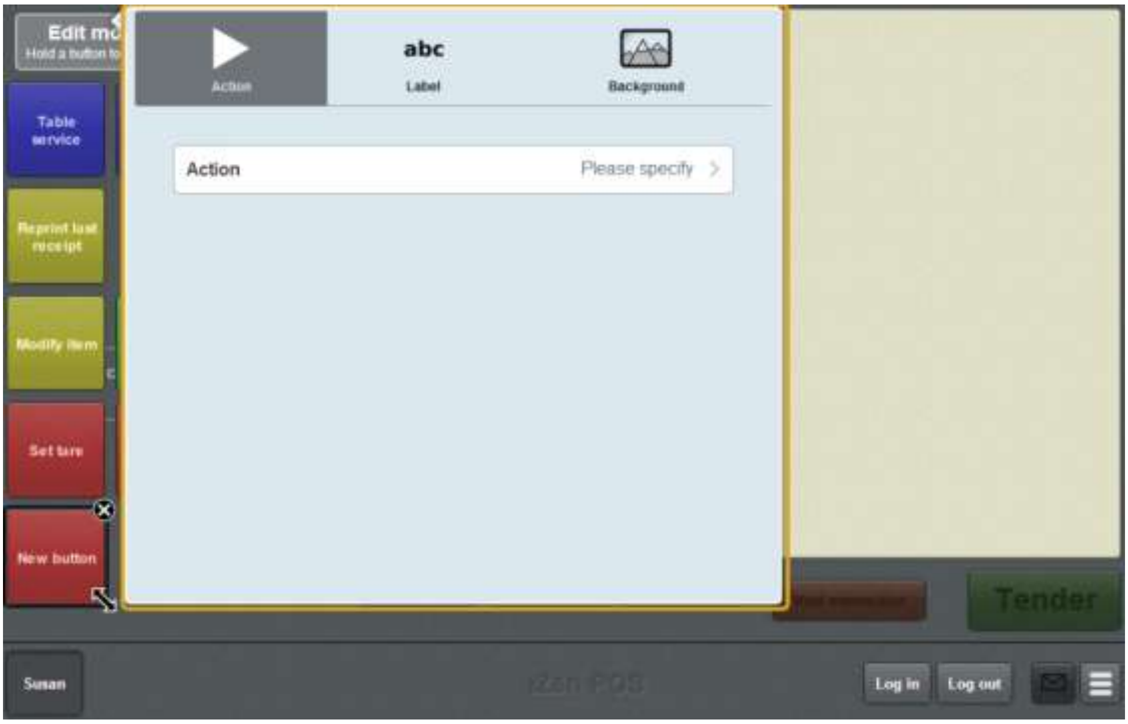
   The One-shot button screen is displayed.

Note: The Point of Sale displays the most recently-viewed tab of the One-shot button screen. This is useful if you want to quickly edit the same attributes of multiple buttons.

Tip: If you have already created a one-shot button, the Point of Sale matches the background and font of the closest one-shot button when creating a new button. If you need to create several buttons that look alike, create them near each other and then drag them to where you want them to appear.

4. Press ▶.

   The Action tab of the One-shot button screen is displayed.



5. Press **Action**.

   The list of available one-shot button actions is displayed.

6. Press **Z Read**.

   The button is configured to perform a Z read on the cash-drawer the terminal is connected to.

7. If you want to change the appearance or text of the button's label, see *Changing the appearance and text of a one-shot button label* on page 119.

8. If you want to change the background colour or image of the button, see *Changing the background colour or image of a one-shot button* on page 122.

Note: You can configure the terminal to require a supervisor's authorisation to perform this button's function. See *Terminal setup screen - Security tab* on page 50.

9. Press anywhere on the Transaction screen to close the One-shot button screen.
10. Press Save.

    The one-shot buttons are saved.

Creating a one-shot button to perform ZZ reads

You can create a one-shot button to perform a ZZ read on the cash-drawer that the terminal is connected to.

See *Performing a ZZ read* on page 386.

To create a one-shot button to perform a ZZ read:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

2. Press **Edit one-shot buttons**.

   One-shot button editing is enabled on the Transaction screen.

> **Note:** You cannot use one-shot buttons while editing is enabled, with the exception of buttons that open one-shot button pages. Save or cancel your changes if you want to use the buttons.

3. Press and hold where you want the one-shot button to be placed.

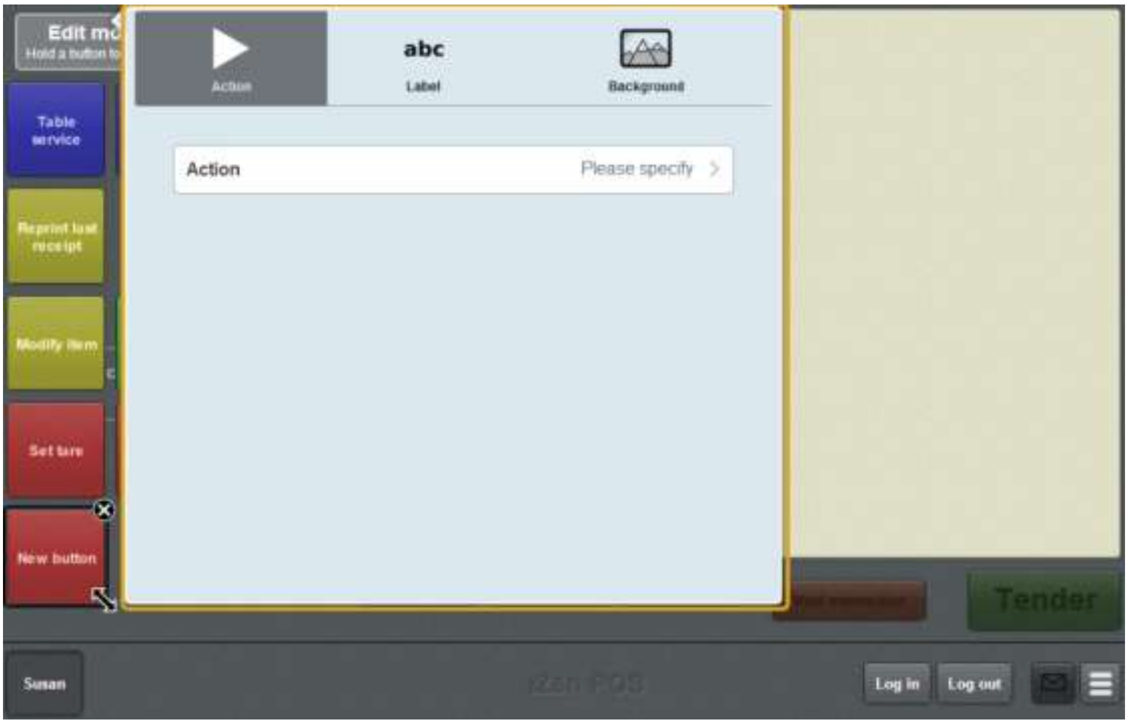
   The One-shot button screen is displayed.

> **Note**: The Point of Sale displays the most recently-viewed tab of the One-shot button screen. This is useful if you want to quickly edit the same attributes of multiple buttons.

> **Tip**: If you have already created a one-shot button, the Point of Sale matches the background and font of the closest one-shot button when creating a new button. If you need to create several buttons that look alike, create them near each other and then drag them to where you want them to appear.

4. Press ▶.

   The Action tab of the One-shot button screen is displayed.



5. Press **Action**.

   The list of available one-shot button actions is displayed.

6. Press **ZZ Read**.

   The button is configured to perform a ZZ read on the cash-drawer the terminal is connected to.

7. If you want to change the appearance or text of the button's label, see *Changing the appearance and text of a one-shot button label* on page 119.

8. If you want to change the background colour or image of the button, see *Changing the background colour or image of a one-shot button* on page 122.

> **Note:** You can configure the terminal to require a supervisor's authorisation to perform this button's function. See *Terminal setup screen - Security tab* on page 50.

9. Press anywhere on the Transaction screen to close the One-shot button screen.
10. Press Save.

    The one-shot buttons are saved.

Editing one-shot buttons

You can edit one-shot buttons to change the:

- Background colour and image on the button.

  See *Changing the background colour or image of a one-shot button* on page 122.

- Text and appearance of the label.

  See *Changing the appearance and text of a one-shot button label* on page 119.

- Function of the button.

  See *Setting up one-shot buttons* on page 101.

See *One-shot button screen - Action tab* on page 329.

> **Note:** You can press Cancel to undo the changes you have made to the one-shot buttons. This cancels all the changes you have made since you started editing one-shot buttons. See *Cancelling changes to one-shot buttons* on page 118.

You can also delete one-shot buttons from the Transaction screen or one-shot button page. See *Deleting one-shot buttons* on page 327.

To edit a one-shot button:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

2. Press **Edit one-shot buttons**.

   One-shot button editing is enabled on the Transaction screen.

> **My buttons don't work:** You cannot use one-shot buttons while editing is enabled, with the exception of buttons that open one-shot button pages. Save or cancel your changes if you want to use the buttons.

3. Press and hold the one-shot button you want to edit.

   The One-shot button screen is displayed.

> **Note**: The Point of Sale displays the most recently-viewed tab of the One-shot button screen. This is useful if you want to quickly edit the same attributes of multiple buttons.

4. If you want to change the button's function, see *Setting up one-shot buttons* on page 101.
5. If you want to change the appearance or text of the button's label, see *Changing the appearance and text of a one-shot button label* on page 119.
6. If you want to change the background colour or image of the button, see *Changing the background colour or image of a one-shot button* on page 122.

> **Note:** You can configure the terminal to require a supervisor's authorisation to perform this button's function. See *Terminal setup screen - Security tab* on page 50.

7. Press anywhere on the Transaction screen to close the One-shot button screen.

8. Press Save.

   The one-shot buttons are saved.

Deleting one-shot buttons

Delete a one-shot button to remove it from the Transaction screen or one-shot button page.

> **Note:** If you delete a button accidentally, you can press Cancel to undo the changes you have made to the one-shot buttons. This cancels all the changes you have made since you started editing one-shot buttons. There is no way to retrieve a deleted button if your changes have been saved. See *Cancelling changes to one-shot buttons* on page 118.

To delete a one-shot button:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

2. Press **Edit one-shot buttons**.

   One-shot button editing is enabled on the Transaction screen.

3. Press the button you want to delete.

   The ⊗ and ⤡ icons are displayed.

4. Press and hold the ⊗ icon.

   The button turns grey and is deleted.

> **The button won't delete:** If the button does not turn grey, and instead opens the One-shot button screen, you did not press on the ⊗ icon accurately enough. Try pressing on the top half of the icon as accurately as you can.

5. Press **Save**.

   The one-shot buttons are saved.

One-shot button screen - Action tab

Use the Action tab to define what the one-shot button does.

Opening the One-shot button screen - Action tab

To open the One-shot button screen - Action tab:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

2. Press **Edit one-shot buttons**.

   One-shot button editing is enabled on the Transaction screen.

My buttons don't work: You cannot use one-shot buttons while editing is enabled, with the exception of buttons that open one-shot button pages. Save or cancel your changes if you want to use the buttons.

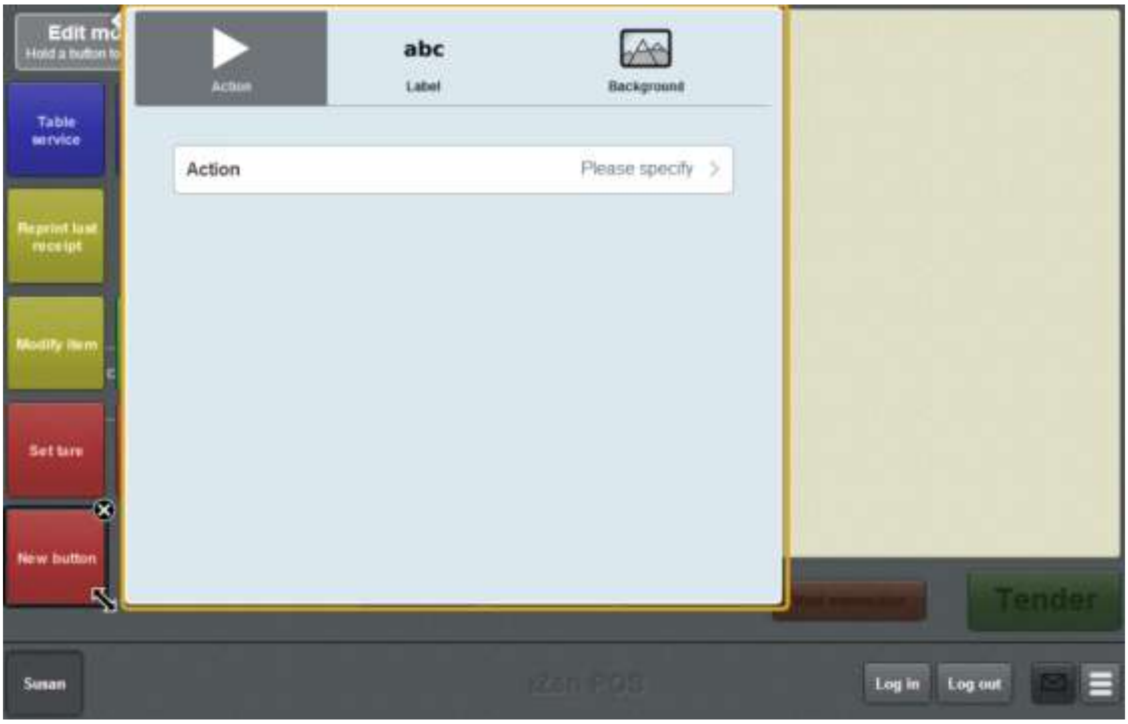
3. Press and hold the one-shot button you want to edit.

   The One-shot button screen is displayed.

Note: The Point of Sale displays the most recently-viewed tab of the One-shot button screen. This is useful if you want to quickly edit the same attributes of multiple buttons.

4. Press ▶.

   The Action tab of the One-shot button screen is displayed.



Action Please specify

One-shot button screen - Action tab key fields and buttons

Field	Description
Action	The action the button performs. See *Setting up one-shot buttons* on page 101.
Parameters	The parameters related to the selected action. **Note:** The available parameters depend on which action is selected. Some parameters are optional. Please view the procedure for the specific action. See *Setting up one-shot buttons* on page 101.

One-shot button screen - Label tab

Use the Label tab to edit the appearance and text of the label on a one-shot button. You can:

- Select whether or not the label is displayed.
- Override the label text.
- Select the font, colour and positioning of the label.

See *Changing the appearance and text of a one-shot button label* on page 119.

Opening the One-shot button screen - Label tab

To open the One-shot button screen - Label tab:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

2. Press **Edit one-shot buttons**.

   One-shot button editing is enabled on the Transaction screen.

My buttons don't work: You cannot use one-shot buttons while editing is enabled, with the exception of buttons that open one-shot button pages. Save or cancel your changes if you want to use the buttons.

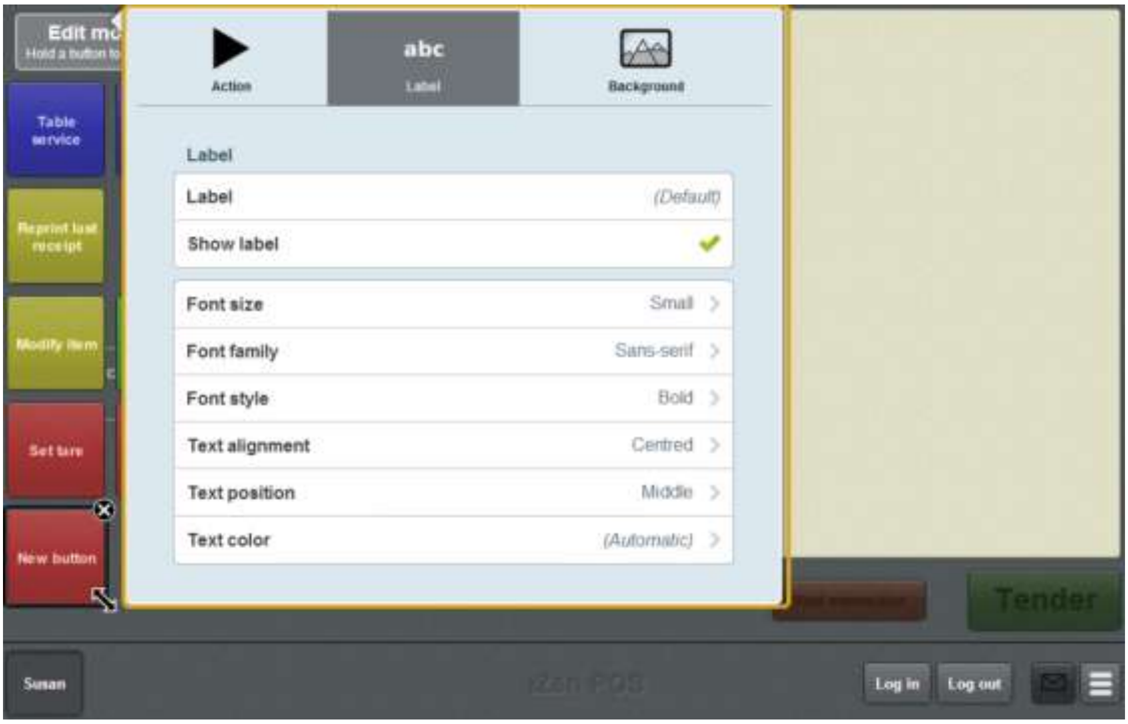
3. Press and hold the one-shot button you want to edit.

   The One-shot button screen is displayed.

Note: The Point of Sale displays the most recently-viewed tab of the One-shot button screen. This is useful if you want to quickly edit the same attributes of multiple buttons.

4. Press **abc**.

   The Label tab of the One-shot button screen is displayed.



Label

Label (Default)
Show label ✓

Font size Small
Font family Sans-serif
Font style Bold
Text alignment Centred
Text position Middle
Text color (Automatic)

One-shot button screen - Label tab key fields and buttons

Field	Description
Label	The text that appears on the button, if **Show label** is selected. If no text is specified, the button uses either: ▪ The default text supplied for its action. For example, Reprint receipt. ▪ The label defined by the **POS Button Label** field in the Portal, if the button is for an item lookup and the item has a button label defined in the Portal. **Note:** If you override the default label, the button text no longer updates. For example, one-shot buttons representing tables do not display the customer name if the button label has been overridden.
Show label	Select to show the label on the button.
Font size	Select the size of the label text on the button. **I can't make the font larger:** At its largest setting, the Point of Sale displays the font at the maximum size that allows all the button text to be visible. If you need the font to be larger, either increase the size of the button, or use a shorter label.
Font family	Select the font family to use: ▪ Serif - the letters have "tips" and "wings", such as Times New Roman. ▪ Sans serif - the letters do not have "tips" and "wings", such as Arial. ▪ Cursive - the letters look like they are handwritten. ▪ Monospace - all letters are given the same amount of space, such as Courier.
Font style	Select the style of font to use: ▪ Normal ▪ **Bold**

Field	Description
	▪ *Italic* ▪ ***Bold italic***.
Text alignment	Select whether the text is aligned to the left, the centre or the right of the button.
Text position	Select whether the text is positioned at the top, the middle or the bottom of the button.
Text colour	Select the colour of the label. Press **AUTO** to have the Point of Sale automatically select the most readable colour based on the button's background colour. For more information on configuring colours, see *Terminal setup screen - One-shot buttons tab* on page 67.

One-shot button screen - Background tab

Use the Background tab to edit the colour and background image of a one-shot button. You can:

- Select a preset colour.
- Customise the button's colour.
- Select an image from the Portal to display on the button.

See *Changing the background colour or image of a one-shot button* on page 122.

Opening the One-shot button screen - Background tab

To open the One-shot button screen - Background tab:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

2. Press **Edit one-shot buttons**.

   One-shot button editing is enabled on the Transaction screen.

My buttons don't work: You cannot use one-shot buttons while editing is enabled, with the exception of buttons that open one-shot button pages. Save or cancel your changes if you want to use the buttons.

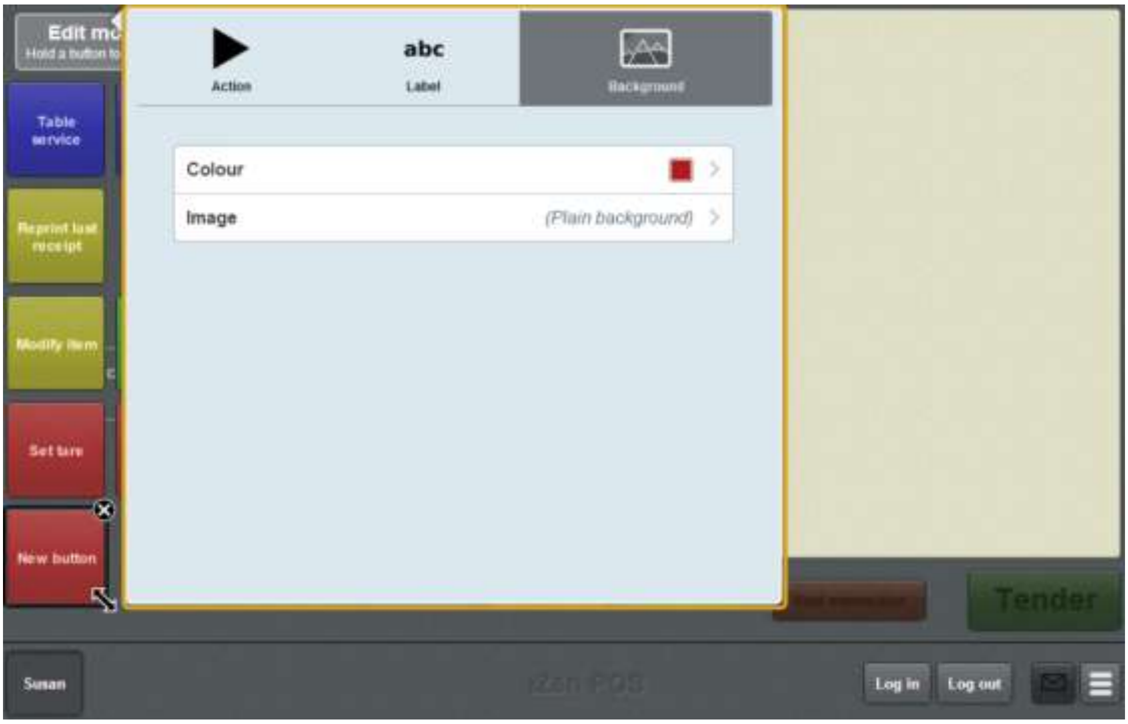
3. Press and hold the one-shot button you want to edit.

   The One-shot button screen is displayed.

Note: The Point of Sale displays the most recently-viewed tab of the One-shot button screen. This is useful if you want to quickly edit the same attributes of multiple buttons.

4. Press 🖼.

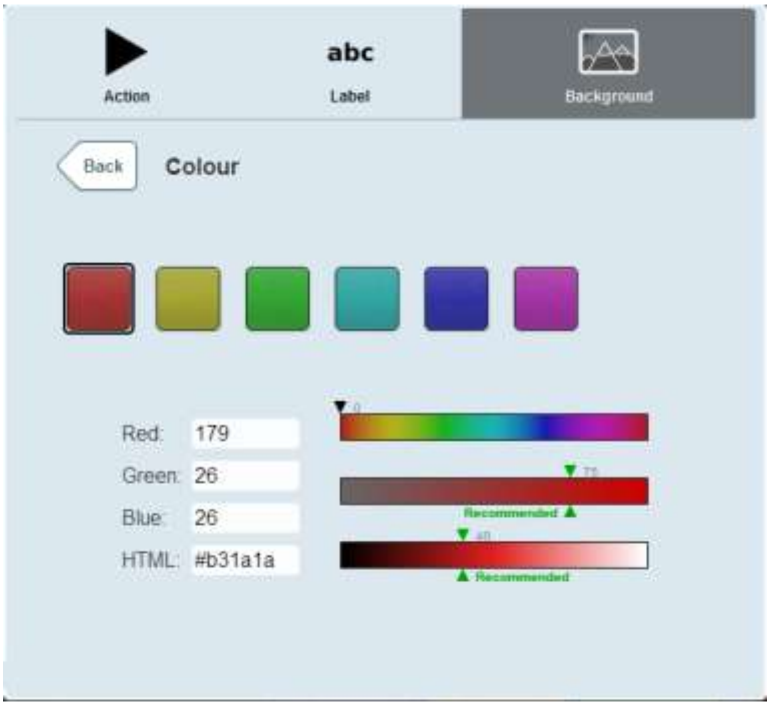
   The Background tab of the One-shot button screen is displayed.



Colour 🟥

Image *(Plain background)*

One-shot button screen - Background tab key fields and buttons

Field	Description
Colour	The colour of the button. Press **Colour** to display the colour presets and customisation.  Red: 179 Green: 26 Blue: 26 HTML: #b31a1a For more information on configuring colours, see *Terminal setup screen - One-shot buttons tab* on page 67.

Field	Description
Image	The background image on the button. Press **Image** to display the available images.  **Note:** Images may be organised into folders. Select the folder where the image is stored.

Basic terminal functions

Manage the terminal cash levels, no-sales and logged-in users from the Transaction screen of the Point of Sale.

Key terminal concepts

Please see the *Glossary* on page 649 for information relating to the following terms:

Advance
Base station
Cash drawer
Handover
No-sale
Operator
Point of Sale
Site
Terminal
Terminal group

Also see:

- *Transaction screen* on page 455.
- *Advance screen* on page 391.
- *Handover screen* on page 394.
- *Change price screen* on page 397.
- *Petty cash screen* on page 400.
- *User messages screen* on page 407.
- *Print label screen* on page 403.

What you can do:

The following topics explain basic terminal functions:

- *Logging in to the terminal* on page 348.
- *Logging out of the terminal* on page 346.
- *Swapping operators* on page 350.
- *Changing the operator colour* on page 351.
- *Providing supervisor authorisation* on page 353.
- *Recording a no-sale* on page 354.
- *Recording an advance* on page 355.
- *Recording a handover* on page 357.
- *Changing an item's price on the Portal* on page 359.
- *Recording petty cash expenses on the Point of Sale* on page 376.
- *Reading user messages* on page 380.
- *Reprinting the last receipt* on page 372.
- *Printing a label for an item sold by unit* on page 364.
- *Printing a label for an item sold by weight* on page 368.
- *Performing an X read* on page 383.
- *Performing a Z read* on page 385.
- *Performing a ZZ read* on page 386.
- *Displaying an external web page* on page 387.
- *Using the iPad scanner* on page 362.

The following topics explain the tasks related to adding items to transactions:

- *Finding an item* on page 411.
- *Selling an item by unit* on page 414.
- *Selling an item by weight* on page 416.
- *Taring the scale* on page 418.
- *Changing an item's quantity* on page 429.
- *Applying a discount to an item* on page 434.
- *Removing or changing a discount from an item* on page 437.
- *Overriding the price of an item* on page 441
- *Refunding an item* on page 424.
- *Creating gift vouchers* on page 421.
- *Adding options to items* on page 432.

- *Adding a loyalty card* on page 444.
- *Parking a transaction* on page 448.
- *Restoring a parked transaction* on page 449.
- *Voiding an item* on page 451.
- *Voiding a transaction* on page 453.

Also see:

- *Selling and refunding items* on page 409.
- *Site reports* on page 633.

Logging out of the terminal

Log out of the terminal when:

- You have finished using it.
- You want to move the terminal to another site.

> **I can't log out:** Depending on your configuration, the **Log out** button may be disabled if you have an open transaction. Park your transaction and then press **Log out**. If the Point of Sale is configured to allow operators to log out with an active transaction, the transaction is automatically parked. See *Parking a transaction* on page 448.

To log out of the terminal:

1. From the Transaction screen, press **Log out**.

The terminal logs you out and switches to the next remaining logged-in operator.

Note: If you were the only logged-in operator, the Operator log in screen is displayed.

See *Operator log in screen* on page 91.

Logging in to the terminal

You must log in to the terminal before you can use it. Logging into the terminal is slightly different depending on whether:

- Another operator is already logged in.
- The Point of Sale is configured to allow more than one operator to log in at a time.

To log in to the terminal:

1. If an operator has already logged in to the terminal, the Transaction screen is displayed. Press Log in.

> **Note:** If Log in is not displayed, the Point of Sale is configured to only allow one operator to log in at a time. Press Log out to log the current operator out.

The Operator log in screen is displayed.

See *Operator log in screen* on page 91.

2. Type in your **Operator** code and **Password**.
3. Press Log in.

   The Transaction screen is displayed.

> **Note:** The one-shot buttons on the left are configurable and may appear differently on your Point of Sale. See *Setting up one-shot buttons* on page 101.

Swapping operators

If more than one operator is logged into a terminal at the same time, you can swap operators.

> **Note:** Your Point of Sale must be configured to:
> (✓) **Allow concurrent logins**
> not (✗) **Automatically log out after each transaction**.
> See *Terminal setup screen - Security tab* on page 50.

To swap operators:

1. Press the button that corresponds to the operator you want to swap to.

   For example, 

.

   The operator is swapped.

> **Note:** If there is no button for the operator you want to swap to, that operator needs to log into the terminal. See *Logging in to the terminal* on page 348.

Changing the operator colour

Each operator can be distinguished by a colour on the terminal. The operator colour affects:

- The operator button on the bottom left of the screen
- The frame of colour around the Item field.

> **Note:** Operator colours must be enabled by selecting **Use operator button colours** in the Miscellaneous tab of the Terminal setup screen before they can be changed. See *Terminal setup screen - Miscellaneous tab* on page 72.

To change the operator colour:

1. Press and hold the operator button you want to change.

> **Note:** If your terminal is configured to require supervisor authorisation, the supervisor authorisation screen is displayed.

The available operator colours are displayed in the Set button colour screen.

2. Select the colour you want.

> **Note:** You can see how different colours look by selecting them before you close the Set button colour screen.

3. When you have selected the colour you want, press the Item field.

   The new operator colour is selected.

Providing supervisor authorisation

Supervisor authorisation may be required for certain tasks such as:

- Changing the site of a terminal.

  See *Connecting a terminal to a site* on page 81.

- Changing the terminal settings.

  See *Setting up a terminal* on page 79.

- Other actions depending on the terminal's security settings.

  See *Terminal setup screen - Security tab* on page 50.

> **The Point of Sale won't accept my authorisation:** Depending on your terminal security settings, you may not be able to authorise your own actions even if you are a supervisor. See *Setting the security and permissions on the Point of Sale* on page 19.

To provide supervisor authorisation:

1. Complete the action that requires supervisor authorisation.

   The Supervisor authorisation screen is displayed.

Please authorise the following action:
Change site

Site: Example

> **Note:** The Point of Sale displays the action you are authorising on the left hand side.

2. Type in your supervisor operator code and password.
3. Press **Authorise**.

   The action is authorised.

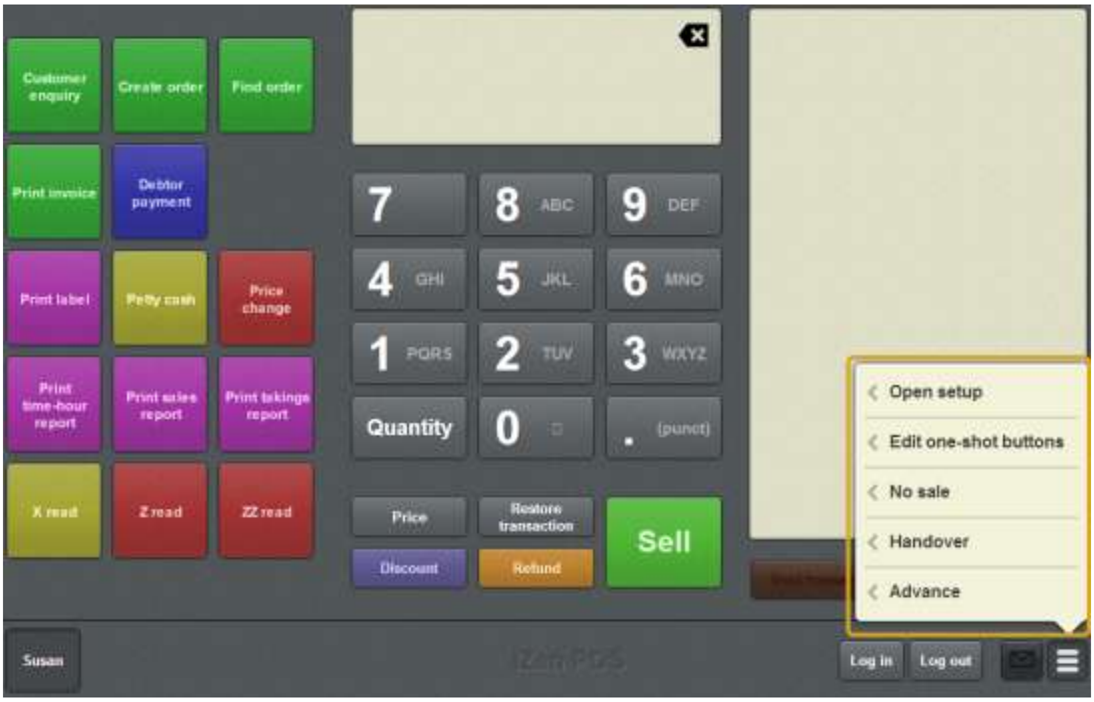
Recording a no-sale

Record a no-sale when you need to open the cash drawer without a transaction.

To record a no-sale:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.



2. Press **No sale**.

   The cash drawer is opened.

> **Note:** Depending on your Point of Sale configuration, you may need a supervisor's authorisation. If you are a supervisor, you may need authorisation from another supervisor.

Recording an advance

Record an advance when you need to add cash to the cash drawer without a transaction. For example, when you need to add change.

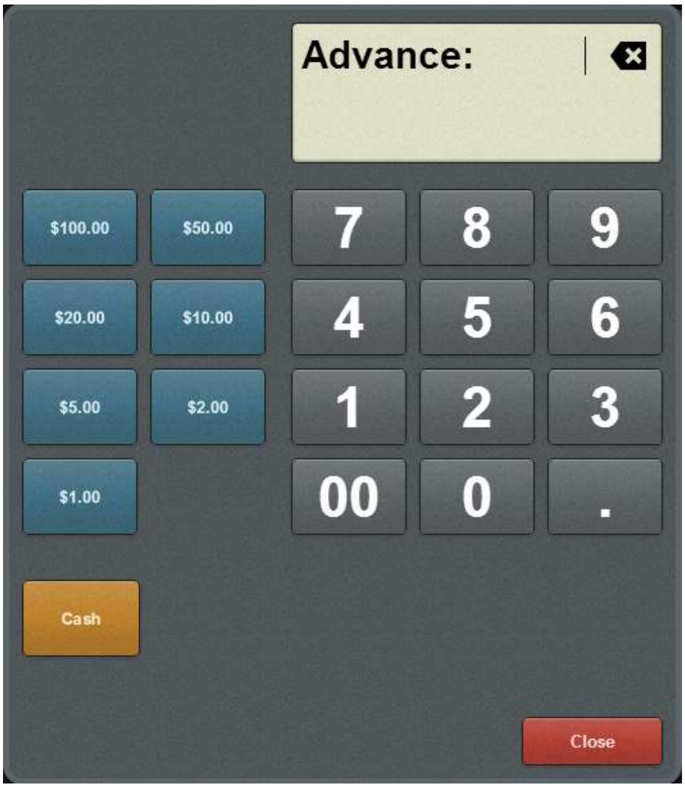
To record an advance:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

2. Press **Advance**.

   The Advance screen is displayed.



See *Advance screen* on page 391.

3. Select the amount of cash you want to add to the cash drawer by:
    - typing the amount using the keypad
    - pressing the Quick amount buttons on the left.

Tip: You can combine these options. For example, you can press the exact amount button and then add more using the cash amounts or keypad.

4. Press the Tender type button for the tender type you want to use.

For example,  for a cash advance.

The advance is complete.

Note: Depending on your Point of Sale configuration, you may need a supervisor's authorisation. If you are a supervisor, you may need authorisation from another supervisor.

Recording a handover

Record a handover when you need to remove cash from the cash drawer without a transaction. For example, when you need to reduce the cash drawer balance to below the floor limit.

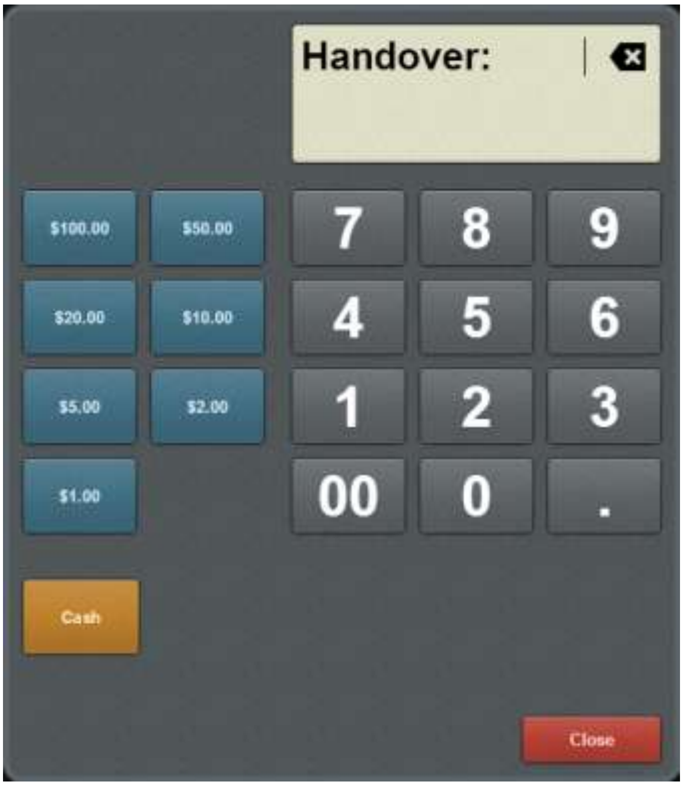
To record a handover:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

2. Press **Handover**.

   The Handover screen is displayed.



See *Handover screen* on page 394.

3. Select the amount of cash you want to remove from the cash drawer by:
    - typing the amount using the keypad
    - pressing the Quick amount buttons on the left.

> **Tip:** You can combine these options. For example, you can press the exact amount button and then add more using the cash amounts or keypad.

4. Press the Tender type button for the tender type you want to use.

   For example,  for a cash handover.

   The handover is complete.

> **Note:** Depending on your Point of Sale configuration, you may need a supervisor's authorisation. If you are a supervisor, you may need authorisation from another supervisor.

Changing an item's price on the Portal

You can change the prices for each price level of an item using the Point of Sale.

> **Note:** These changes are permanent and affect all sites that sell this item. If you want to temporarily override the price of an item, see *Overriding the price of an item* on page 441.

> **Note:** You must have the Price Edit Portal privilege to change item prices, even if you are a site supervisor.

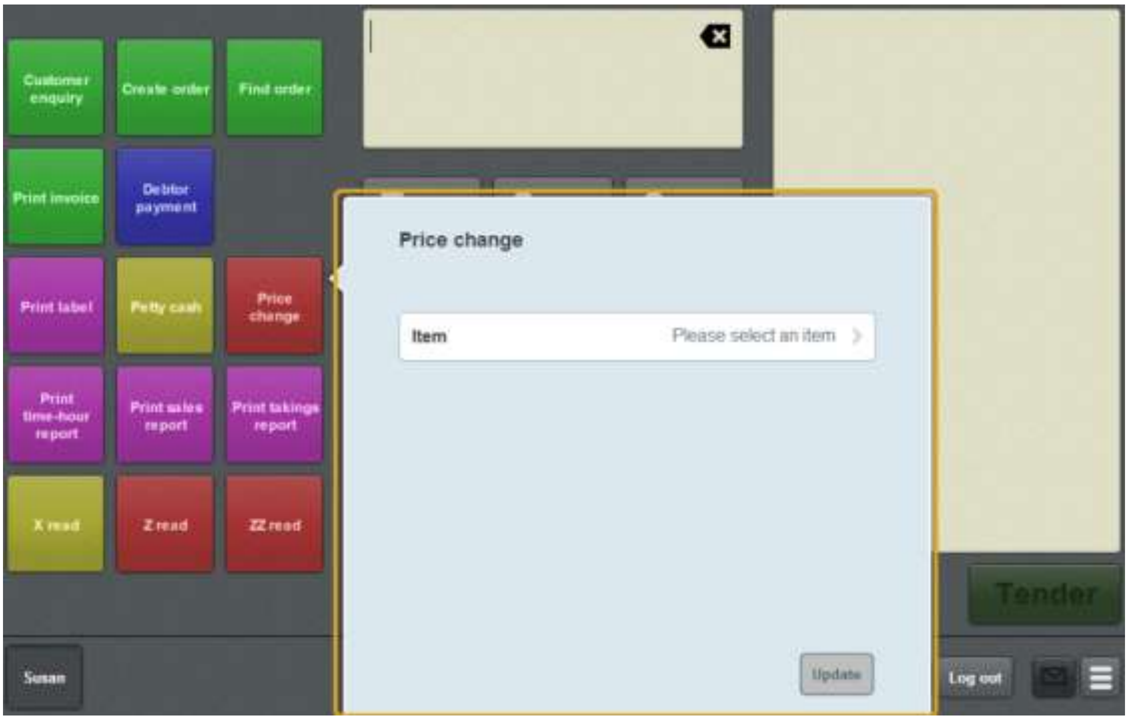
> **Note:** You must have a one-shot button configured to change item prices. See *Creating a one-shot button to change an item's price on the Portal* on page 191.

To change an item's price:

1. Press the **Price change** one-shot button.

> **Note:** Your one-shot button configuration may look different to the documentation.

The Price change screen is displayed.

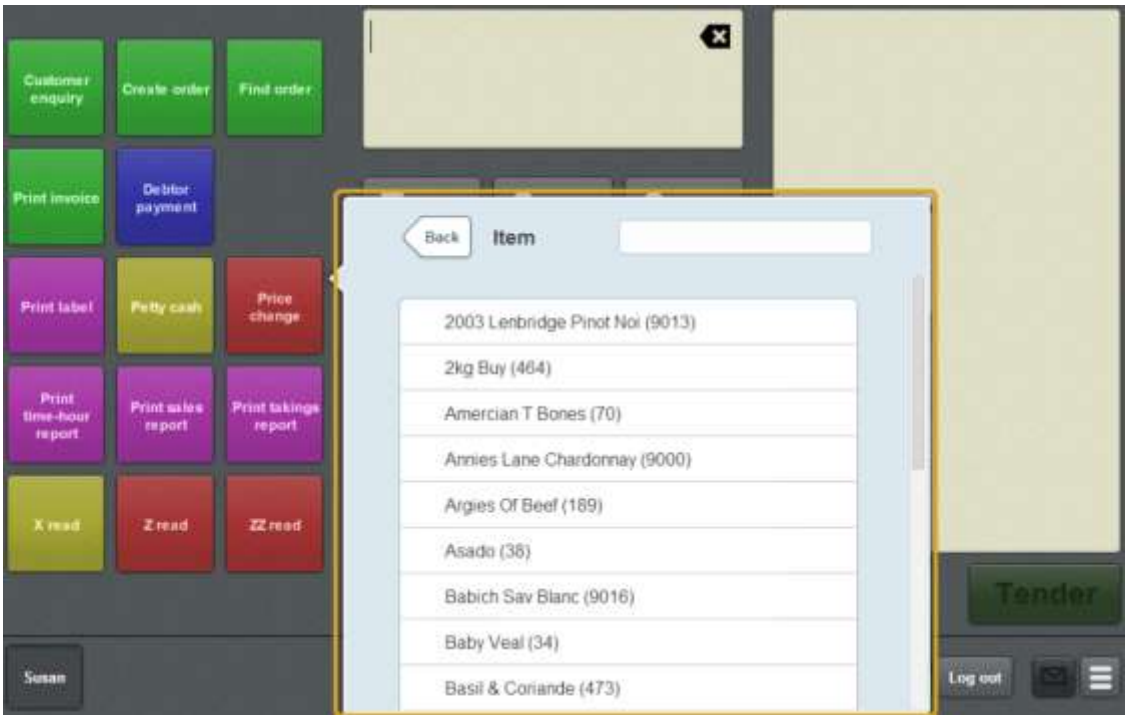


Price change

Item   Please select an item

2. Press **Item**.

   The Select item screen is displayed.



Item

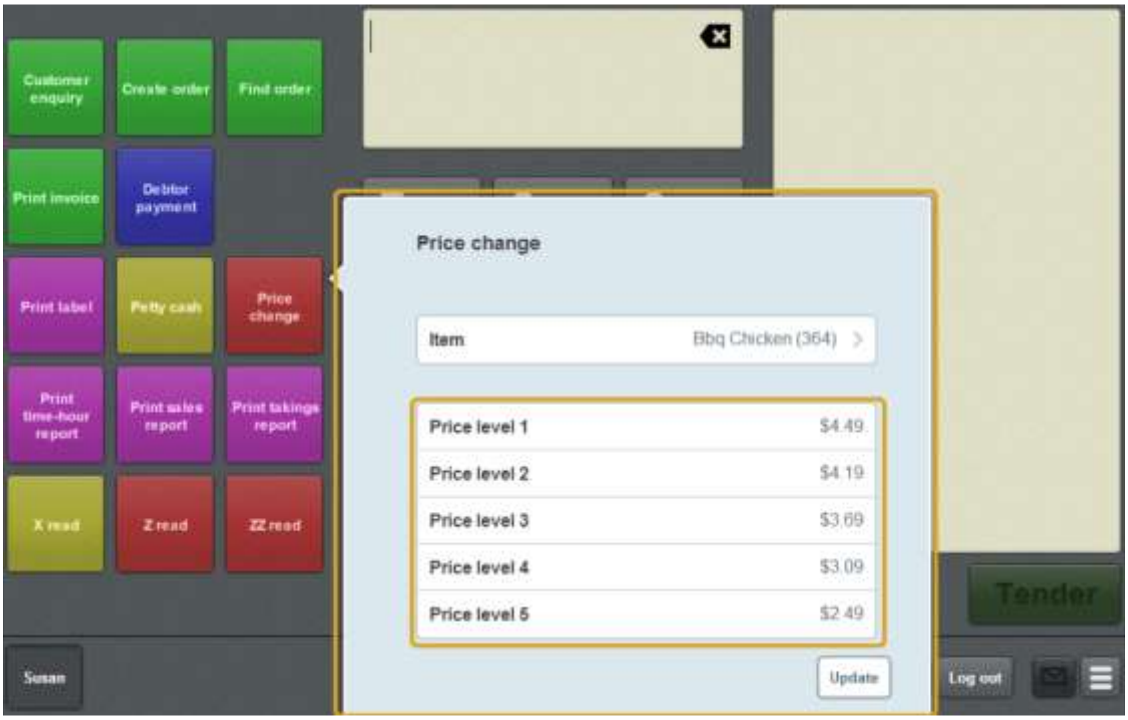
2003 Lenbridge Pinot Noi (9013)
2kg Buy (464)
Amercian T Bones (70)
Annies Lane Chardonnay (9000)
Argies Of Beef (189)
Asado (38)
Babich Sav Blanc (9016)
Baby Veal (34)
Basil & Coriande (473)

3. Type part or all of the item name in the **Item** field.
   The list is filtered to the first twenty items that match your selection.

> **Note:** The filter searches from the beginning of each word in the item name, not mid-word. For example, "re" returns all items with "**re**d" and "**re**ady" in the name, but does not return items with "g**re**en".

4. Press the item you want to change the price of.

   The Price levels area is displayed on the Price change screen.



Price change

Item	Bbq Chicken (364)
Price level 1	$4.49
Price level 2	$4.19
Price level 3	$3.69
Price level 4	$3.09
Price level 5	$2.49

5. Press the price level you want to change and type the new price.

6. When you have finished changing the item price, press Update.

   The price changes are sent to the Portal.

Using the iPad scanner

If you want to connect an external barcode scanner to your iPad terminal, you must enable the iPad scanning mode.

> **Note:** If you have iPad scanning mode enabled but no scanner attached to the iPad terminal, the on-screen keyboard is continually displayed. Turn off the iPad scanning mode when the external scanner is not attached. iPad scanning mode is not required for terminals that are not iPads.

To turn the iPad scanner mode on or off:

1. From the Transaction screen, press ☰.

   The Point of Sale menu is displayed.

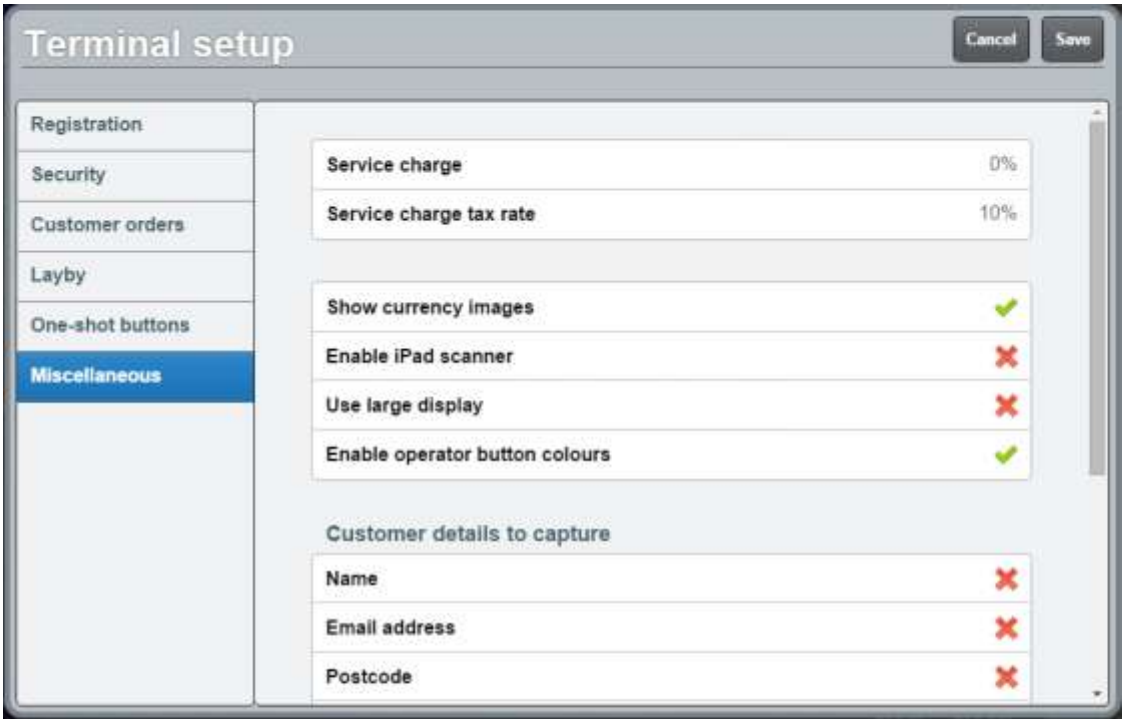
2. Press **Open setup**.

   The Terminal setup screen is displayed.

   > **Note:** The Point of Sale displays the most recently-viewed tab in the Terminal setup screen.

3. Press **Miscellaneous**.

   The Miscellaneous tab is displayed.



Service charge 0%
Service charge tax rate 10%
Show currency images ✓
Enable iPad scanner ✗
Use large display ✗
Enable operator button colours ✓

Customer details to capture
Name ✗
Email address ✗
Postcode ✗

See *Terminal setup screen - Miscellaneous tab* on page 72.

4. Press **Enable iPad scanner** to either:
   1. (✓) Turn the iPad scanner on.
   2. (✗) Turn the iPad scanner off.
5. Press Save.

   The Supervisor authorisation screen is displayed.

Please authorise the following action:
Save changes to setup

6. Type in your supervisor operator code and password.
7. Click Authorise.

   The changes are saved.

Printing a label for an item sold by unit

> **Note:** This topic is for printing labels for items that are sold by unit. To print labels for items that are sold by weight, see *Printing a label for an item sold by weight* on page 368.

You can print different kinds of labels from the Point of Sale.

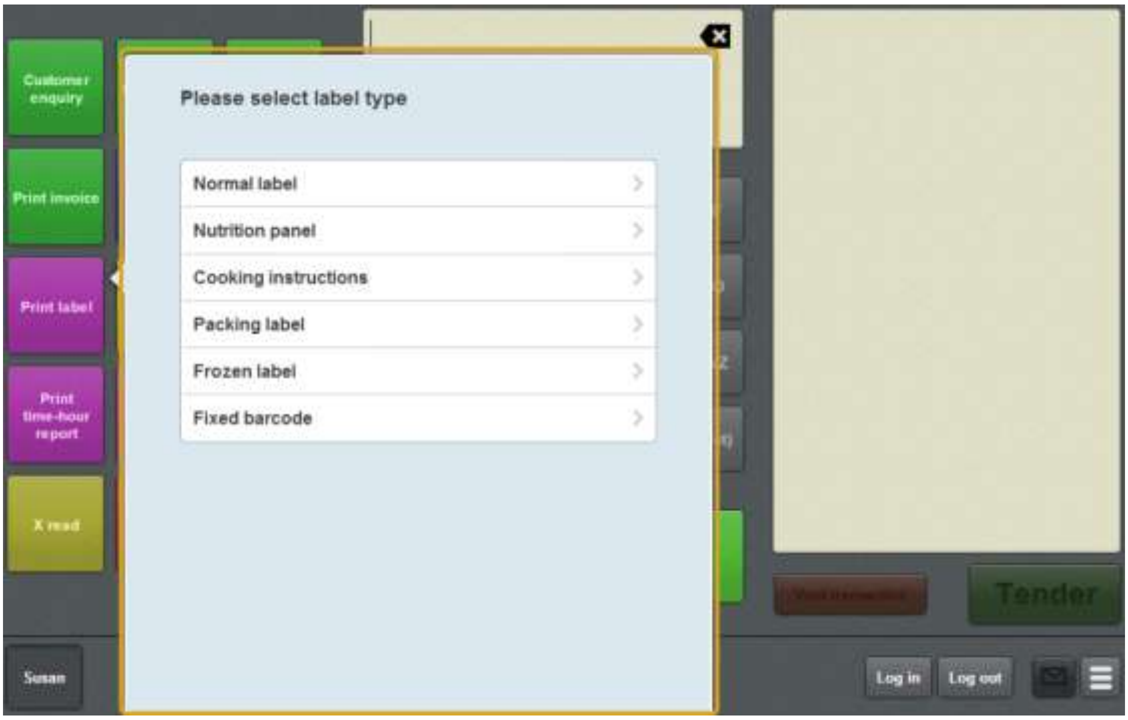
> **Note:** You must have a one-shot button configured to print a label. See *Creating a one-shot button to print labels* on page 237.

To print a label:

1. Press the **Print label** one-shot button.

   > **Note:** Your one-shot button configuration may be different to the documentation.

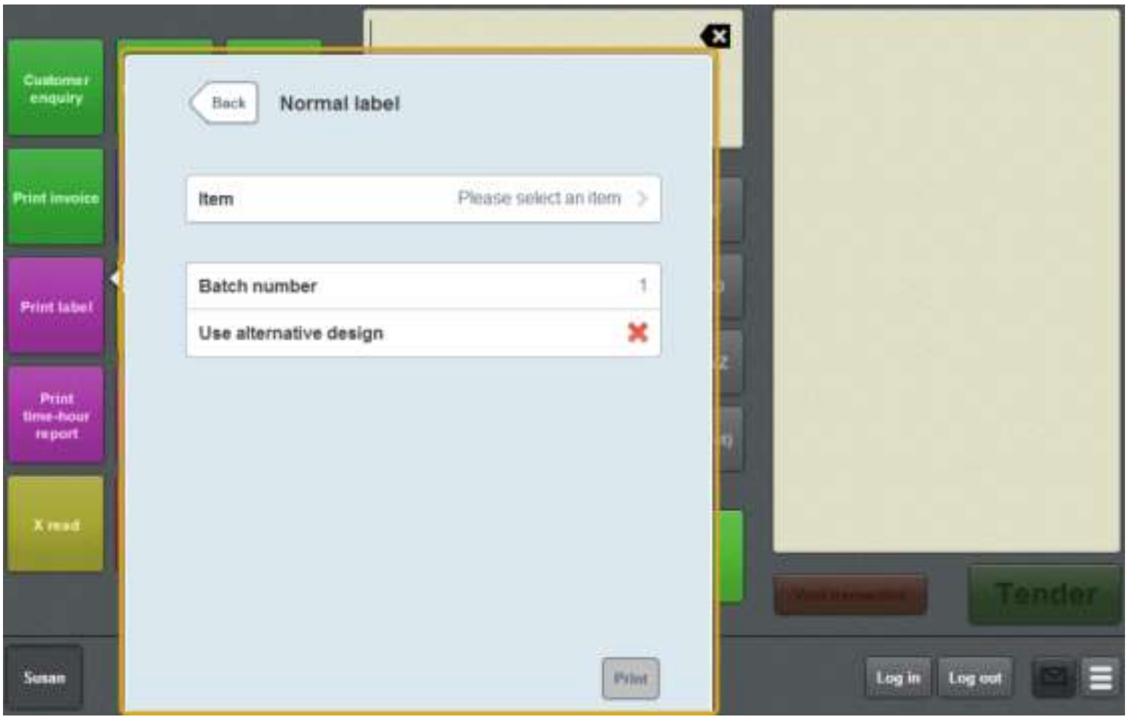
   The Label type screen is displayed.



2. Press the type of label you want to print.

   See *Print label screen* on page 403.

   The Label screen is displayed.



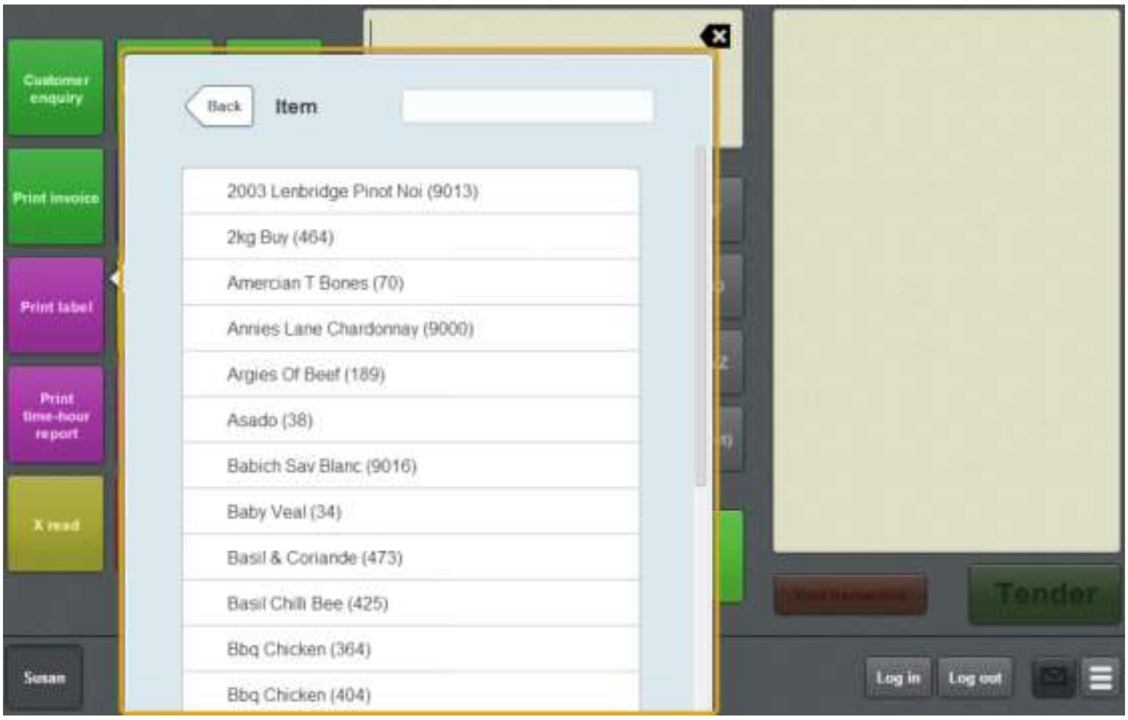
Item Please select an item

Batch number 1

Use alternative design ✗

3. Press **Item**.

   The Item screen is displayed.



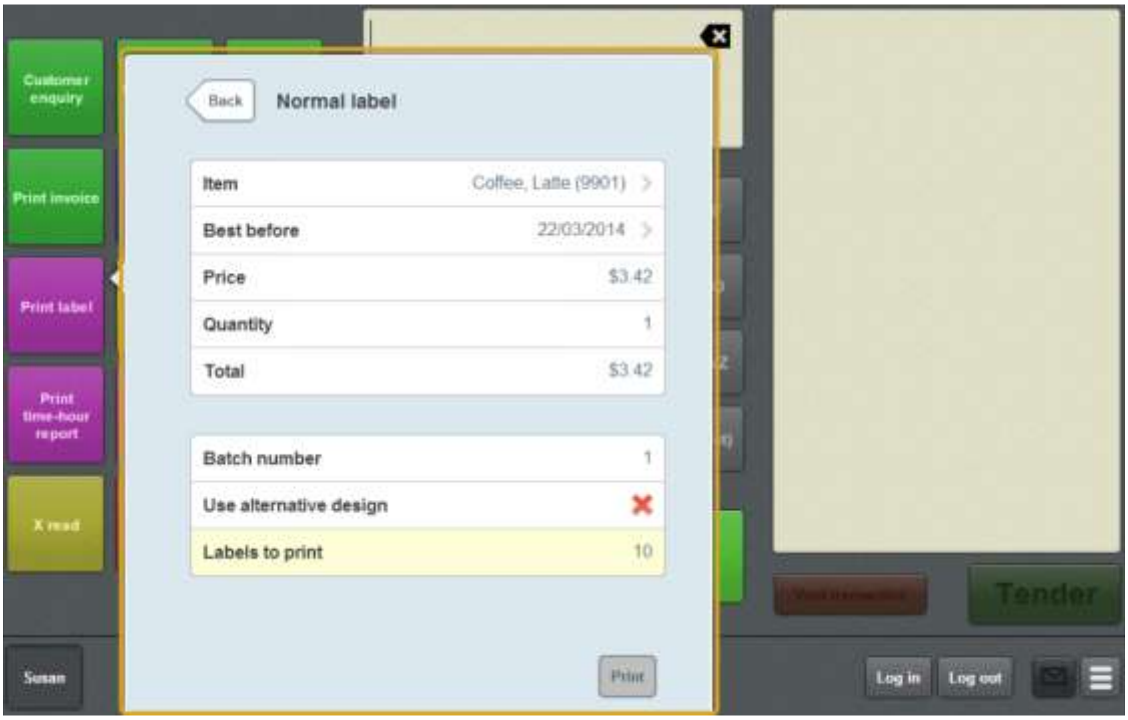
2003 Lenbridge Pinot Noi (9013)
2kg Buy (464)
Amercian T Bones (70)
Annies Lane Chardonnay (9000)
Argies Of Beef (189)
Asado (38)
Babich Sav Blanc (9016)
Baby Veal (34)
Basil & Coriande (473)
Basil Chili Bee (425)
Bbq Chicken (364)
Bbq Chicken (404)

4. Type part or all of the item name in the **Item** field.
   The list is filtered to the first twenty items that match your selection.

> **Note:** The filter searches from the beginning of each word in the item name, not mid-word. For example, "re" returns all items with "**re**d" and "**re**ady" in the name, but does not return items with "g**re**en".

5. Press the item you want to print a label for.

   The Label screen is displayed.



Item	Coffee, Latte (9901)
Best before	22/03/2014
Price	$3.42
Quantity	1
Total	$3.42
Batch number	1
Use alternative design	✗
Labels to print	10

6. Edit the item **Price** or **Best before**, if required.
7. Type in the quantity of the item you want to appear per label.

   For example, if you are creating a bundle of 5 items per label, type **5**.
8. Type in a unique **Batch number** for the set of labels.
9. Select to use an alternative label design if required.
10. Type in the number of labels you want to print with this selection.
11. Press Print.

    The labels are printed.

Printing a label for an item sold by weight

> **Note:** This topic is for printing labels for items that are sold by weight. To print labels for items that are sold by unit, see *Printing a label for an item sold by unit* on page 364.

You can print different kinds of labels from the Point of Sale.

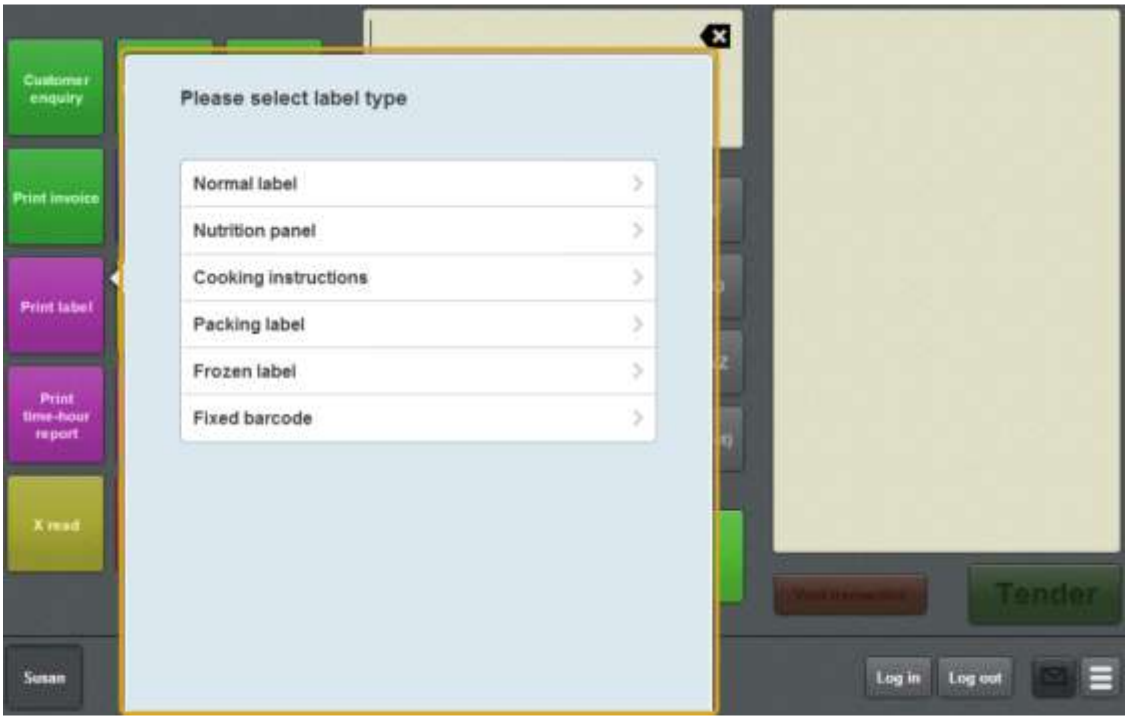
> **Note:** You must have a one-shot button configured to print a label. See *Creating a one-shot button to print labels* on page 237.

To print a label:

1. Press the **Print label** one-shot button.

   > **Note:** Your one-shot button configuration may be different to the documentation.

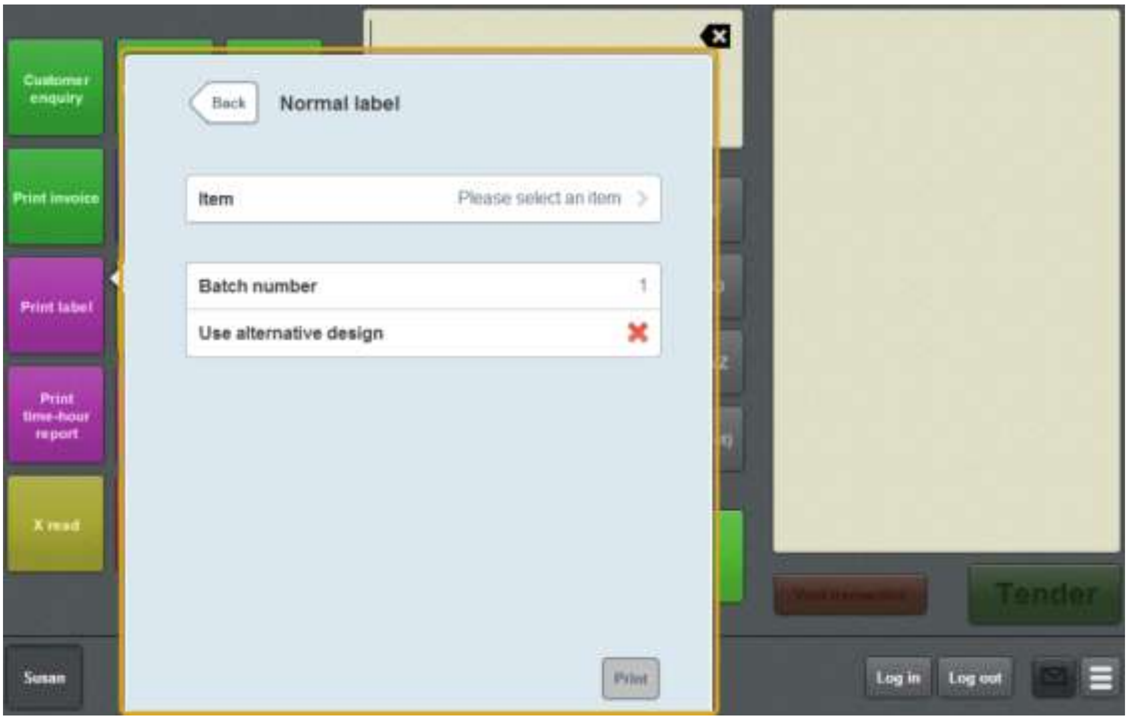
The Label type screen is displayed.



2. Press the type of label you want to print.

   See *Print label screen* on page 403.

   The Label screen is displayed.



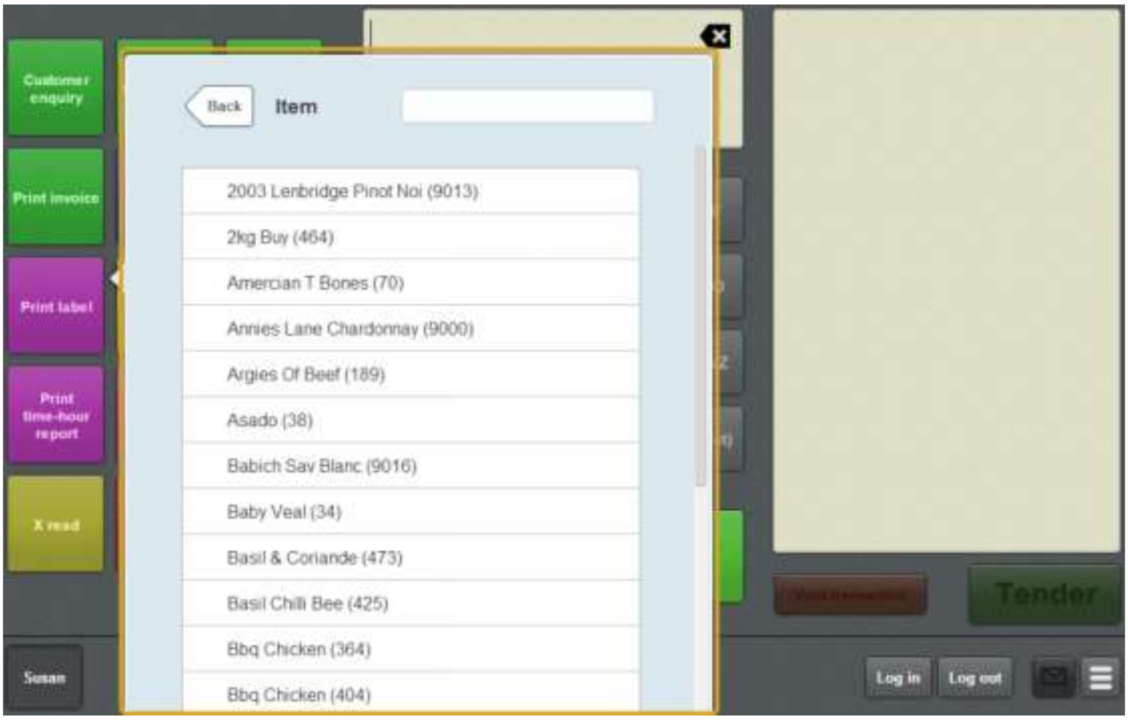
Item: Please select an item

Batch number: 1

Use alternative design: ✗

3. Press **Item**.

   The Item screen is displayed.



Item

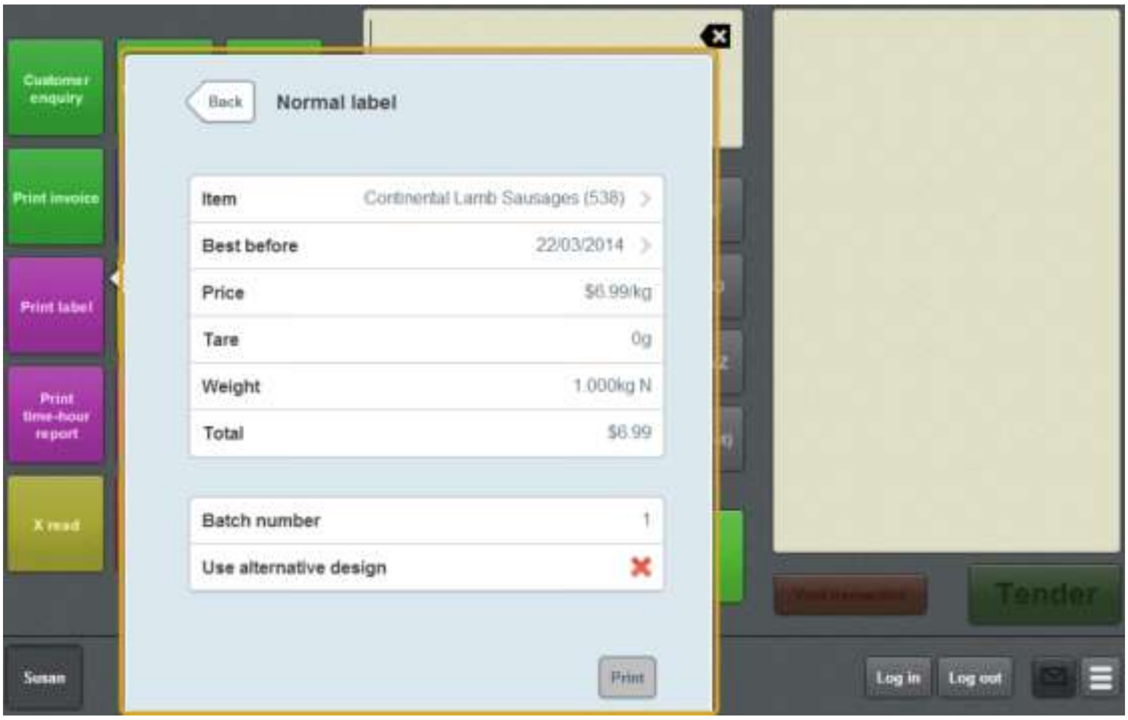
2003 Lenbridge Pinot Noi (9013)
2kg Buy (464)
Amercian T Bones (70)
Annies Lane Chardonnay (9000)
Argies Of Beef (189)
Asado (38)
Babich Sav Blanc (9016)
Baby Veal (34)
Basil & Coriande (473)
Basil Chili Bee (425)
Bbq Chicken (364)
Bbq Chicken (404)

4. Type part or all of the item name in the **Item** field.
   The list is filtered to the first twenty items that match your selection.

> **Note:** The filter searches from the beginning of each word in the item name, not mid-word. For example, "re" returns all items with "**re**d" and "**re**ady" in the name, but does not return items with "g**re**en".

5. Press the item you want to print a label for.

   The Label screen is displayed.



Normal label

Item	Continental Lamb Sausages (538)
Best before	22/03/2014
Price	$6.99/kg
Tare	0g
Weight	1.000kg N
Total	$6.99
Batch number	1
Use alternative design	✗

6. Edit the item **Price** or **Best before**, if required.

> **Note:** The weight of the item on the label is determined by the scale and cannot be changed. Labels must be printed individually for items sold by weight.

7. Type in a unique **Batch number** for the set of labels.
8. Select to use an alternative label design if required.
9. Press Print.

   The labels are printed.

Reprinting the last receipt

You can reprint the receipt of the last transaction that the terminal finalised.

> **Note:** You cannot use this feature to reprint a receipt other than the most recent receipt. If you want to reprint a receipt that is not the most recent, see *Reprinting a selected receipt* on page 373.

> **Note:** You must have a one-shot button configured to reprint the last receipt. See *Creating a one-shot button to reprint the last receipt* on page 245.

To reprint the last receipt:

1. Press the **Reprint last receipt** one-shot button.

   > **Note:** Your one-shot button configuration may be different to the documentation.

The receipt is reprinted.

Reprinting a selected receipt

You can reprint the receipt of any transaction that the terminal finalised in the last thirty days.

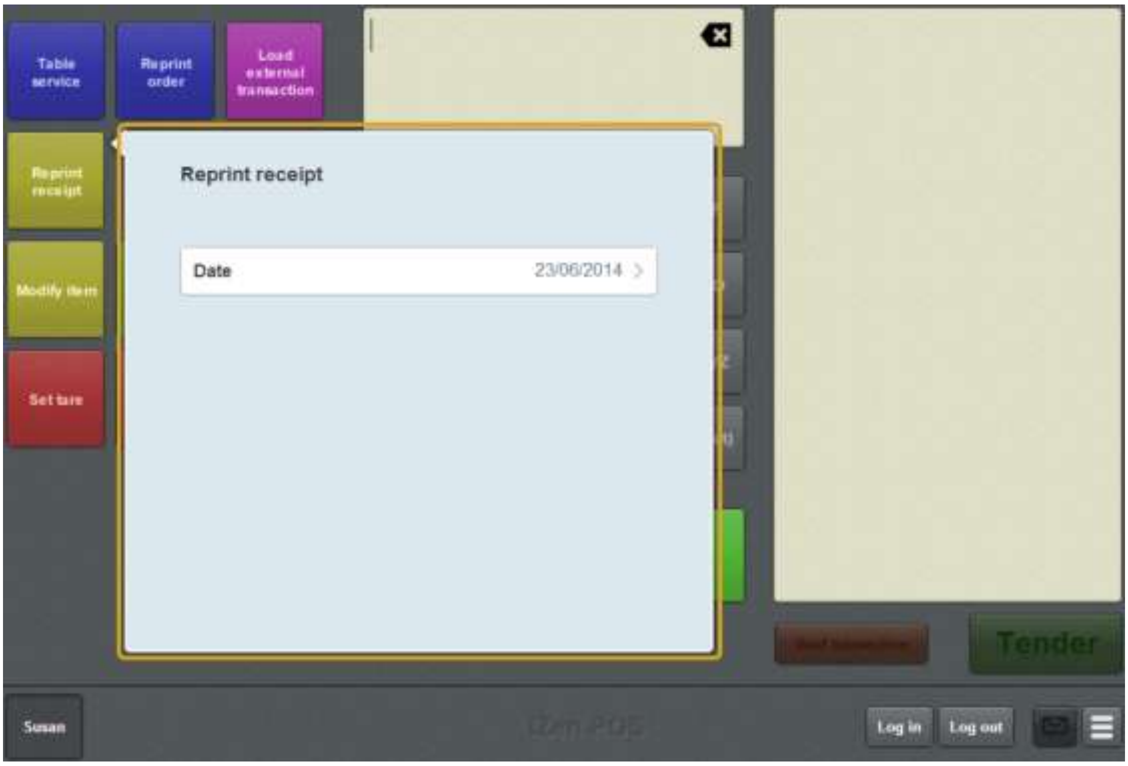
> **Note:** You must have a one-shot button configured to reprint a selected receipt. See *Creating a one-shot button to reprint a selected receipt* on page 253.

To reprint the last receipt:

1. Press the **Reprint receipt** one-shot button.

   > **Note:** Your one-shot button configuration may be different to the documentation.

The Reprint receipt window is displayed.

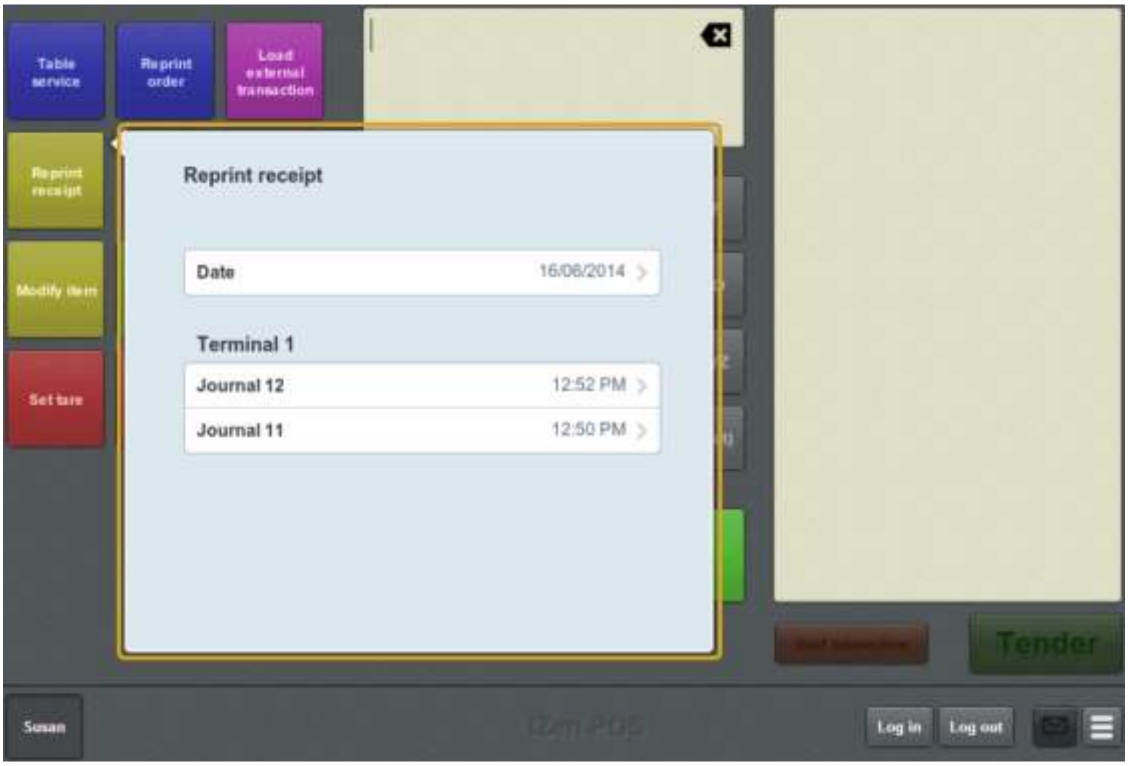


Reprint receipt

Date 23/06/2014

2. Press the date to select the date of the receipt you want to reprint.

   The transactions of each terminal on that date are displayed.



Reprint receipt

Date 16/06/2014

Terminal 1

Journal 12 12:52 PM

Journal 11 12:50 PM

3. Press the receipt you want to reprint.

   A preview of the selected receipt is displayed.

```
Sample Store
Tax Invoice
ABN 11111111111111
Waverly Rd, Wheelers Hill

Coffee                              $3.50
$2 Item                            $32.00
999 Curl Clip Double Prong 401        $1.65
-----------------------------------------
Total                              $37.15
CASH                              -$37.15

Change Due $0.00

$3.38 GST included in the Total

Thank you for shopping at AMC's
```

4. Press **Reprint**.

   The receipt is printed.

Recording petty cash expenses on the Point of Sale

You can record petty cash expenses to specific departments on the Point of Sale.

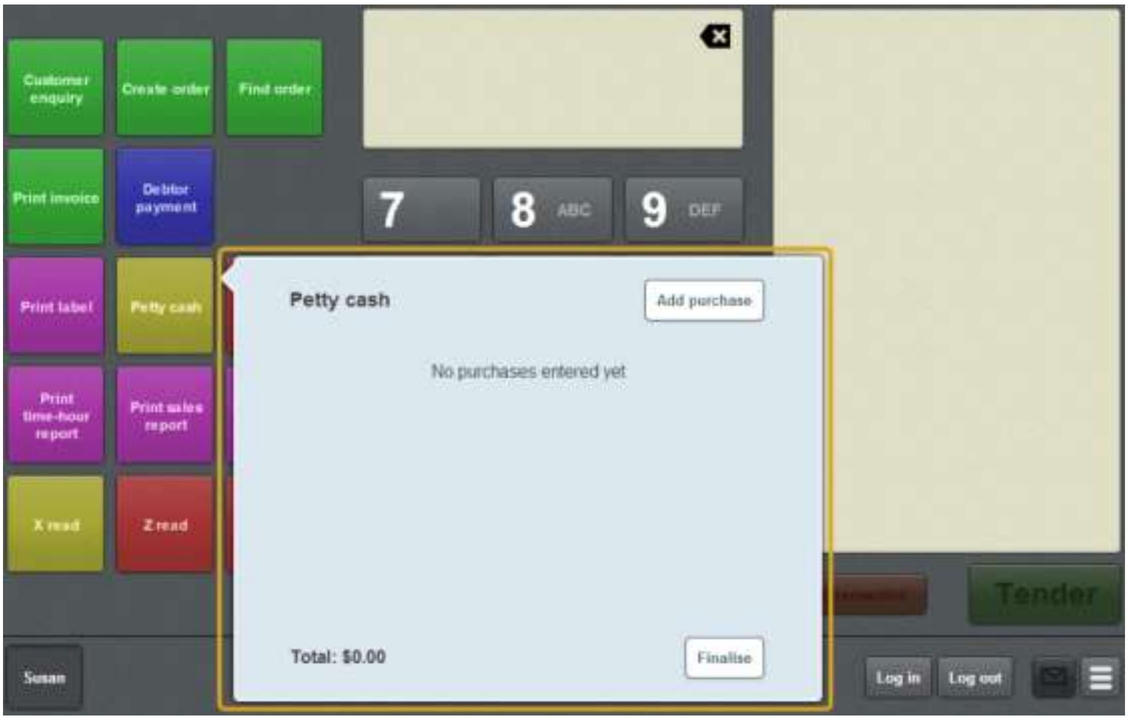
> **Note:** Petty cash can only be accessed from a one-shot buttons on your Point of Sale. See *Creating a one-shot button for petty cash* on page 229.

To record a petty cash expense:

1. Press the **Petty cash** one-shot button.

> **Note:** Your one-shot button configuration may look different to the documentation.

The Petty cash screen is displayed.

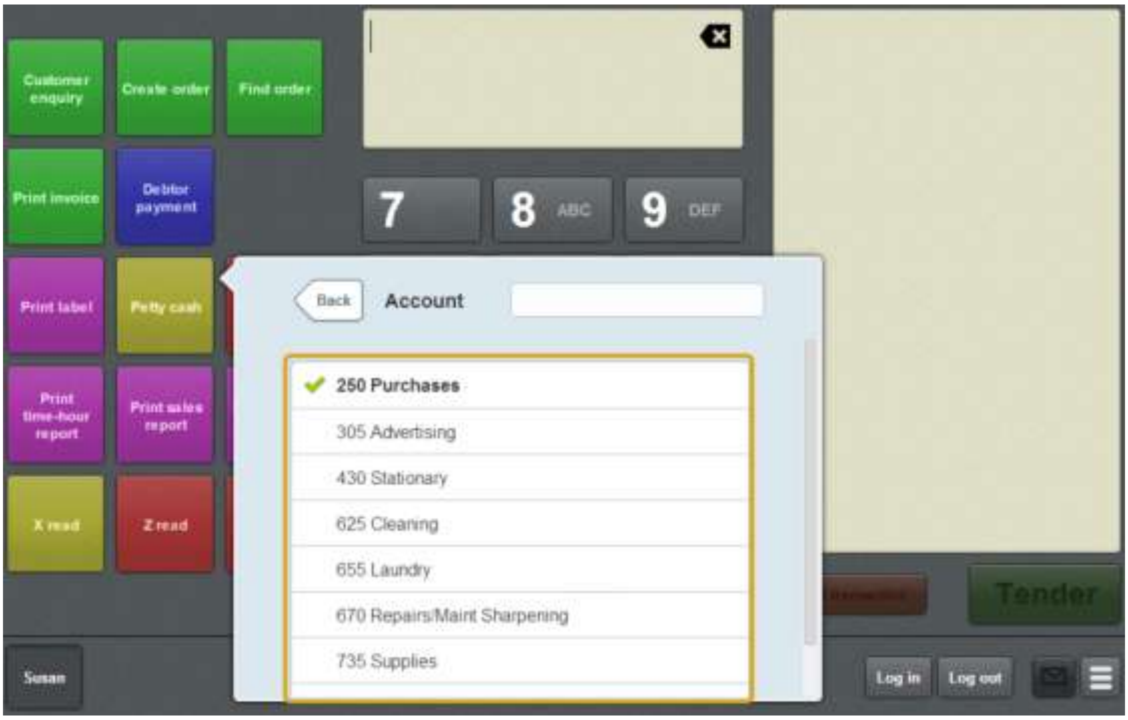


No purchases entered yet

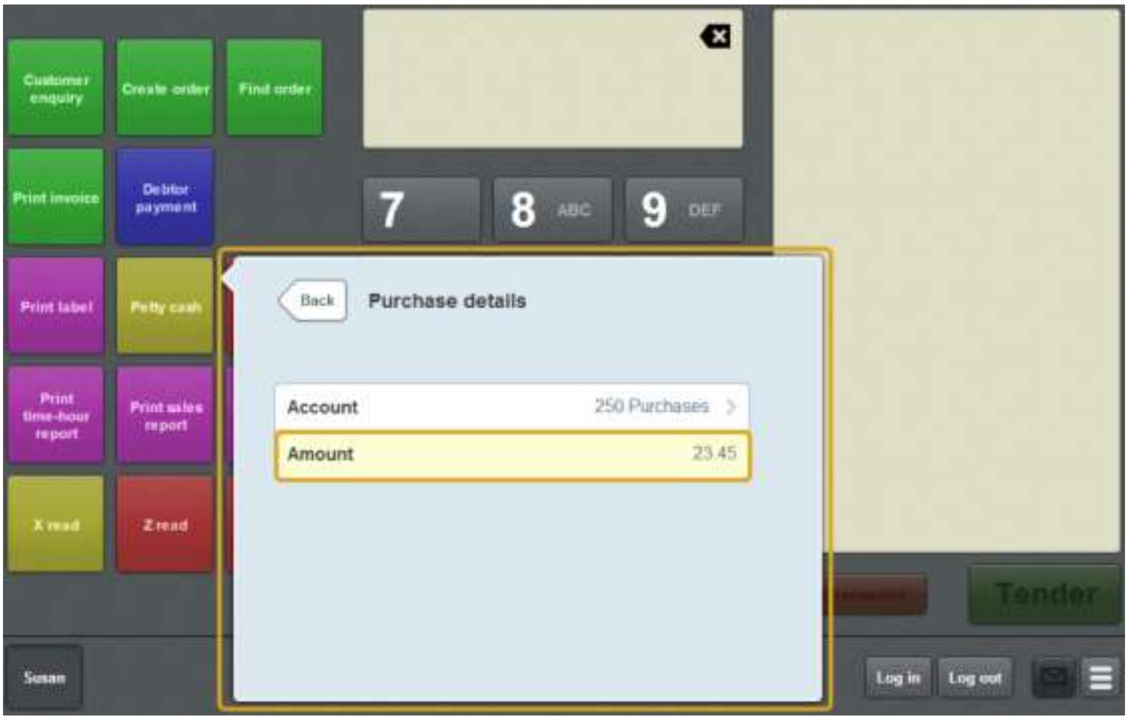
Total: $0.00

2. Press Add purchase.

   The available petty cash expense departments are displayed.



3. Press the appropriate department for the expense.
4. Press **Amount**.
5. Type in the expense amount.

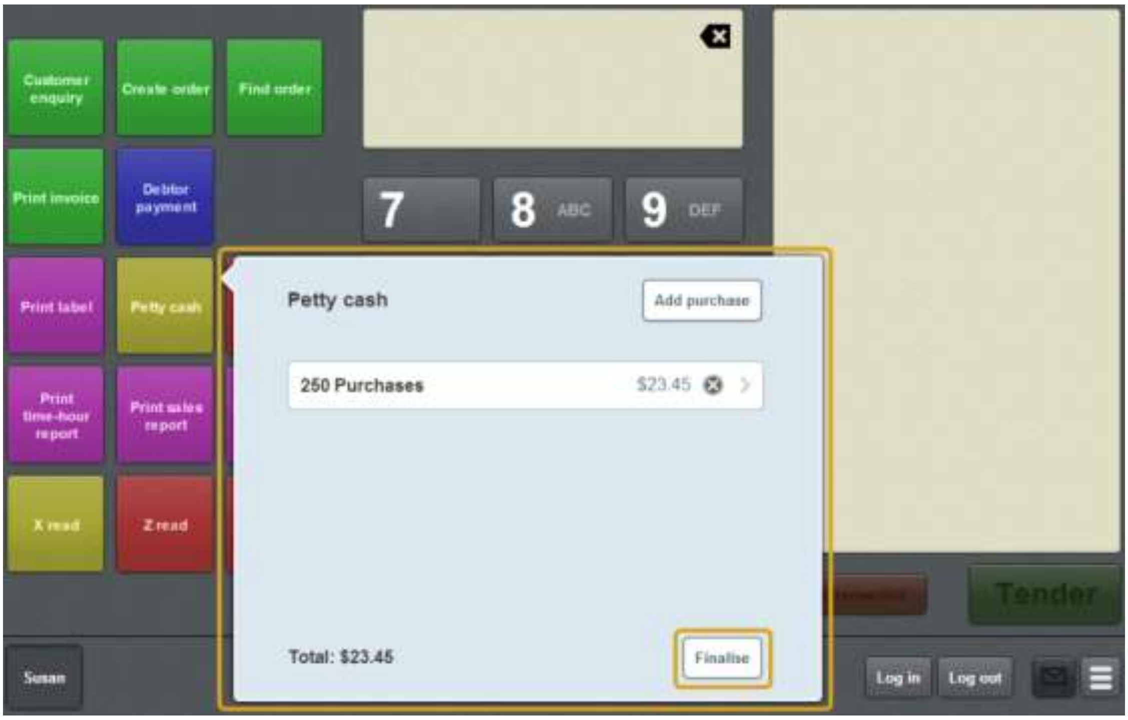


Purchase details

Account: 250 Purchases

Amount: 23.45

6. Press Back.
7. If you have more petty cash expenses to record, add each expense by pressing Add purchase.
8. When you have finished adding petty cash expenses, press Finalise.



Petty cash

250 Purchases $23.45

Total: $23.45

The petty cash expense is recorded.

The cash drawer is opened.

Reading user messages

You can read messages sent via the Portal on the User messages screen on the Point of Sale.

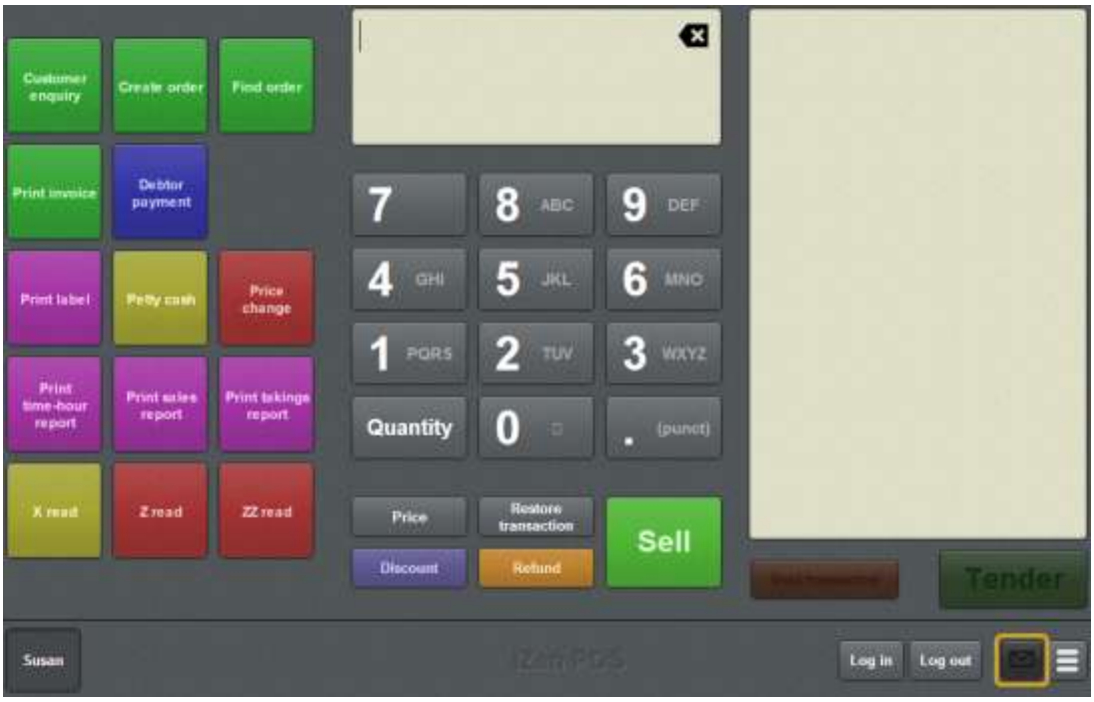
The Point of Sale checks for messages when it first loads, and every five minutes thereafter.

New messages are indicated by the glowing button.

> **Note:** Read messages are available until the Point of Sale is reloaded.

To read messages from the Portal:

1. Press on the Transaction screen

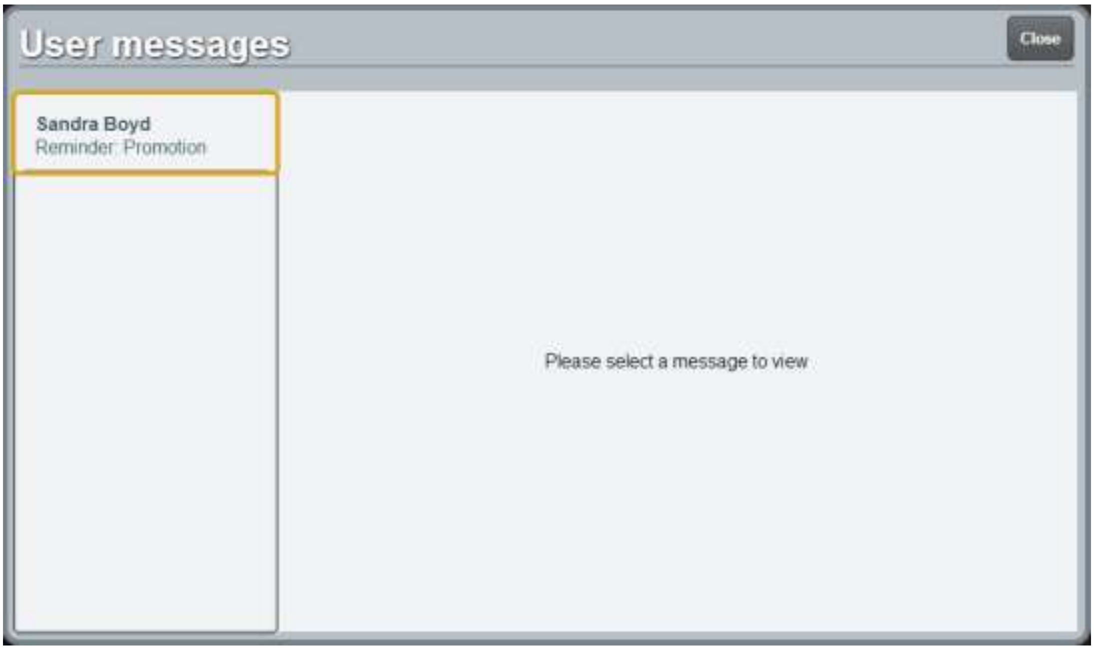


> **Note:** You can still open the User messages screen even if the button is not glowing.

The User messages screen is displayed.

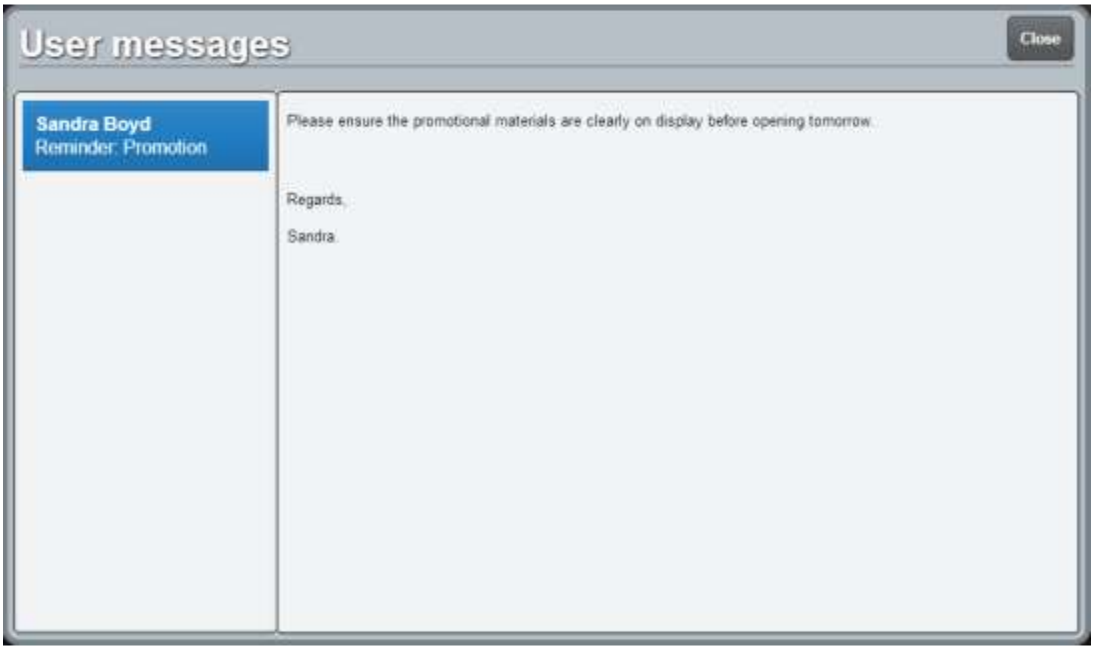
Please select a message to view

2. Press the message you want to read.



Please select a message to view

The message is displayed.



Please ensure the promotional materials are clearly on display before opening tomorrow.

Regards,

Sandra.

> **Note:** The Point of Sale sends a notification to the Portal when a new message has been read.

Performing an X read

Perform an X read during the day to print a report including:

- The sales summary, including discounts, services charges, tax and rounding.
- The transaction totals.
- The terminal activity, including transaction totals by tender type, all advances, handovers, voids and petty cash allocations.
- The total amount subtracted in item and sales discounts.
- The number of transactions per tender type.
- The total taxable and non-taxable sales, and tax collected.
- The number of transactions and total takings per each hourly block.

> **Note:** An X read does not change the cash-drawer totals. If you want to set the totals to zero in order to perform a cash-up, see *Performing a Z read* on page 385.

> **Note:** You must have a one-shot button configured to perform an X read. See *Creating a one-shot button to perform Z reads* on page 316.

To perform an X read:

1. Press the **X Read** one-shot button.

   > **Note:** Your one-shot button configuration may be different to the documentation.

The X read is printed.

Performing a Z read

Perform a Z read at the end of the day to:

- Print an X read report.

  See *Performing an X read* on page 383.

- Zero a cash-drawer's totals after printing the report in order to complete a cash-up.

> **Note:** A Z read sets the day's takings to zero, and should only be performed at the end of the day. If you want to view the totals without changing them, perform an X read. See *Performing an X read* on page 383.

> **Note:** You must have a one-shot button configured to perform a Z read. See *Creating a one-shot button to perform Z reads* on page 316.

To perform a Z read:

1. Press the **Z Read** one-shot button.

   > **Note:** Your one-shot button configuration may be different to the documentation.

The Z read is printed and the cash-drawer totals reset.

Performing a ZZ read

Perform a ZZ read to:

- Print an X read report.

  See *Performing an X read* on page 383.
- Zero a cash-drawer's totals after printing the report in order to complete a cash-up.
- Zero all the sales and transaction report data.

  See *Site reports* on page 633.

> **Note:** A ZZ read sets the day's takings to zero and delete all sales and transaction data, and should only be performed at the end of the day after any required site reports have been printed. If you want to view the totals without changing them, perform an X read. See *Performing an X read* on page 383.

> **Note:** You must have a one-shot button configured to perform a ZZ read. See *Creating a one-shot button to perform Z reads* on page 316.

To perform a ZZ read:

1. Press the **ZZ Read** one-shot button.

   > **Note:** Your one-shot button configuration may be different to the documentation.

   The ZZ read is printed and the cash-drawer totals and sales reports data are reset.

Displaying an external web page

You can display an external web page within the Point of Sale using a one-shot button.

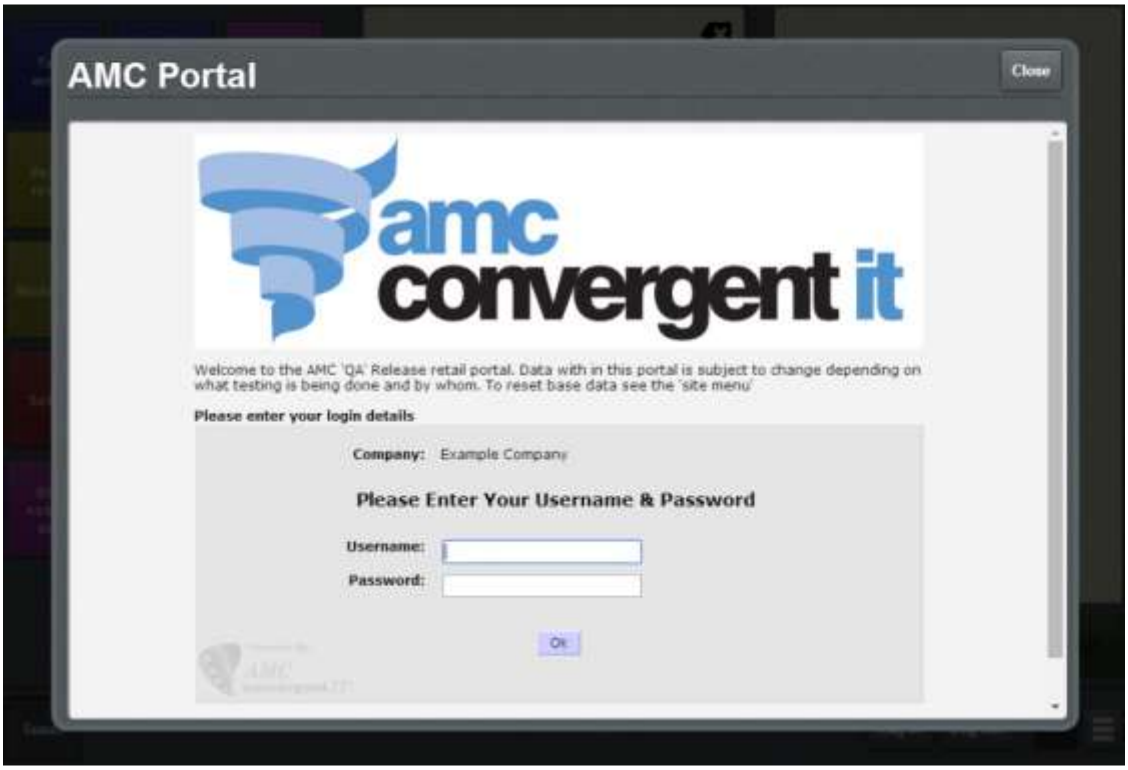
> **Note:** External web pages can only be displayed using a one-shot buttons configured to the specific page. See *Creating a one-shot button to display an external web page* on page 295.

To display an external web page:

1. Press the **Show external page** one-shot button.

> **Note:** Your one-shot button configuration may look different to the documentation. The Show external page one-shot button may have a different label.

The external web page is displayed.



Welcome to the AMC 'QA' Release retail portal. Data with in this portal is subject to change depending on what testing is being done and by whom. To reset base data see the 'site menu'

Please enter your login details

Company: Example Company

Please Enter Your Username & Password

Using the terminal training mode

User the terminal training mode to practise adding items and tenders to a transaction without impacting the Portal records.

Note: Training mode only affects transactions. All other actions that do not involve a transaction such as changing a customer's loyalty details, changing the terminal settings or performing a price change are **not** affected by training mode. These actions are processed by the terminal and the Portal as normal.

When a terminal is in training mode:

- All transactions operate without sending information to the portal or opening the cash-drawer. These include:
  - table orders
  - customer orders
  - debtor payments
  - standard item sales and refunds
  - advances
  - no-sales
  - handovers.

  Note: Gift voucher sales and redemptions are automatically validated by the Point of Sale for the purposes of the transaction, but gift vouches created or redeemed from a terminal in training mode are not created or redeemed on the Portal.
- Receipts printed from transactions are clearly marked with 'Training mode'.
- Transactions that were initiated by a terminal in normal sales mode cannot be modified, voided or finalised.

  For example, if you create and then park a transaction in normal sales mode, then enter training mode and restore that transaction, you cannot make any changes to that transaction, void it or finalise it. You must either park the transaction or exit training mode.

Note: Transactions from training mode cannot be viewed, modified, voided or finalised outside of training mode. If a transaction is created in training mode and parked, any terminal that restores that transaction is automatically put into training mode until the transaction is voided, parked or finalised.

Note: To use the terminal training mode, you must have a one-shot button configured to open the training mode. See *Creating a one-shot button to enter and exit training mode* on page 304.

To use the terminal training mode:

1. Press the **Training mode** one-shot button.

   The terminal is put into training mode.

2. When you have finished training, press the **Training mode** one-shot button a second time.

   The terminal is put into normal sales mode.

Advance screen

Use the Advance screen to record cash that is added to the cash drawer without a transaction. For example, when you need to add change. See *Recording an advance* on page 355.

Opening the Advance screen

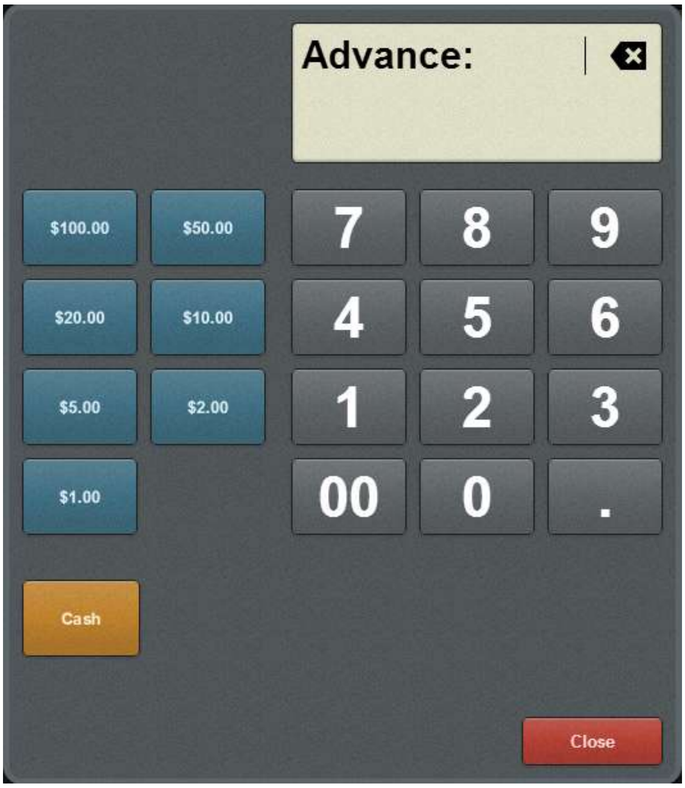
To open the Advance screen:

1. From the Transaction screen, press ☰.

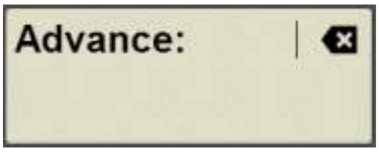
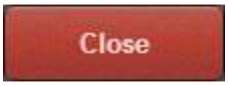
   The Point of Sale menu is displayed.

2. Press **Advance**.

   The Advance screen is displayed.


Advance:
$100.00
$50.00
$20.00
$10.00
$5.00
$2.00
$1.00
7
8
9
4
5
6
1
2
3
00
0
.
Cash
Close

Advance screen key fields and buttons

Field	Description
	The Item field displays the amount selected to add to the cash drawer.
	Press an amount on the Quick amount buttons to add to the cash drawer. For example, to add $250, you can press $100 twice and $50 instead of typing the amount in the keypad.
	Type an amount to add to the cash drawer.
	Press the button that corresponds to the tender type you want to use to complete the advance. **Note:** Depending on your Portal configuration, there may be more than one Tender type button.
	Close the Advance screen without completing the advance.

Handover screen

Use the Handover screen to record cash removed from the cash drawer. For example, if the cash drawer balance needs to be reduced back to the floor limit. See *Recording a handover* on page 357.

Opening the Handover screen

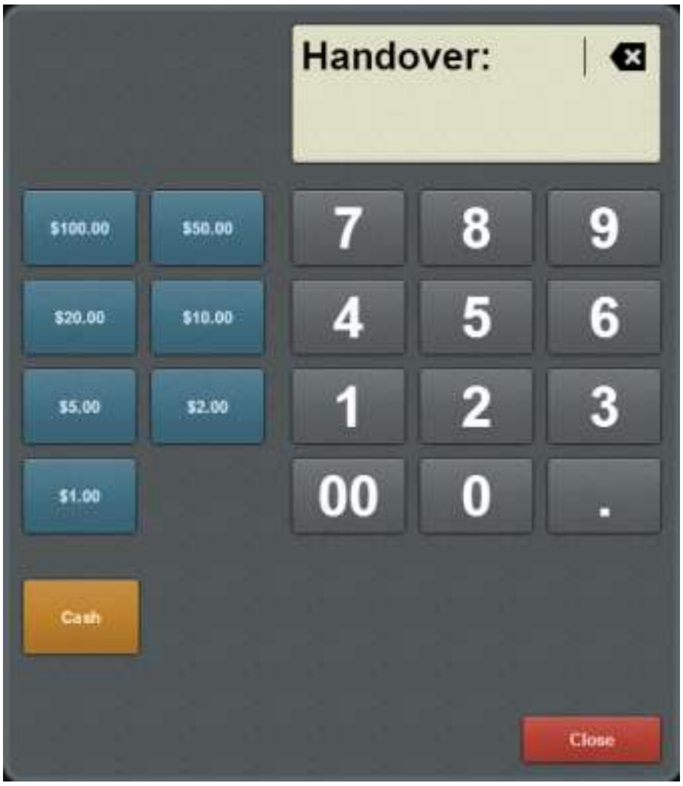
To open the Handover screen:

1. From the Transaction screen, press ☰.

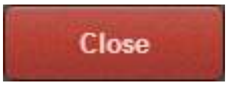
   The Point of Sale menu is displayed.

2. Press **Handover**.

   The Handover screen is displayed.


Handover:
$100.00
$50.00
$20.00
$10.00
$5.00
$2.00
$1.00
7
8
9
4
5
6
1
2
3
00
0
.
Cash
Close

Handover screen key fields and buttons

Field	Description
	The Item field displays the amount to be removed from the cash drawer.
	Press an amount on the Quick amount buttons to be removed from the cash drawer. For example, to add $250, you can press $100 twice and $50 instead of typing the amount in the keypad.
	Type an amount to remove from the cash drawer.
	Press the button that corresponds to the tender type you want to use to complete the handover. **Note:** Depending on your Portal configuration, there may be more than one Tender type button.
	Close the Handover screen without completing the handover.

Change price screen

Use the Change price screen to send changes to the price levels of an item back to the Portal. See *Changing an item's price on the Portal* on page 359.

Note: These changes are permanent and affect all sites that sell this item. If you want to temporarily override the price of an item, see *Overriding the price of an item* on page 441.

Note: You must have the Price Edit Portal privilege to change item prices, even if you are a site supervisor.

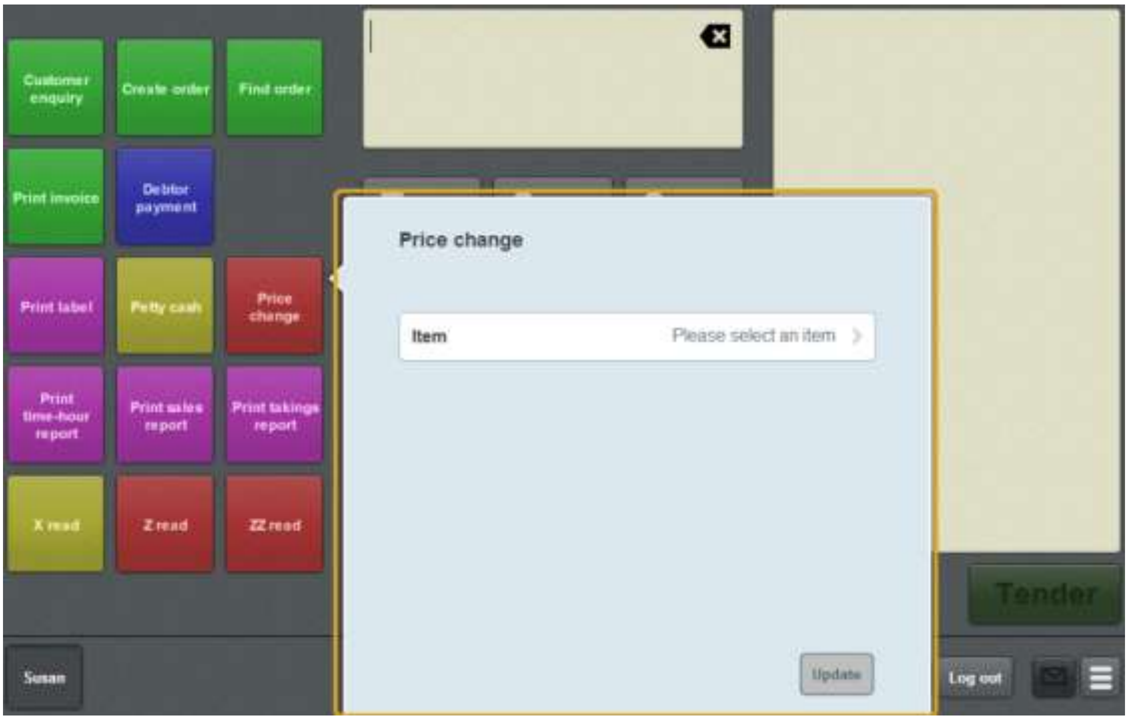
Opening the Change price screen

To open the Change price screen:

1. Press the **Price change** one-shot button.

Note: Your one-shot button configuration may look different to the documentation.

The Price change screen is displayed.



Price change screen key fields and buttons

Item area

The item area displays the item you have selected to change.

Field	Description
Item	The item you want to change the price levels of. Press to select another item. See *Changing an item's price on the Portal* on page 359.

Price level area

The item area displays the prices for each price level of the item you have selected to change. Press a price level to change its price.

Note: Some items may not use different price levels, or may use fewer than the configuration in the documentation.

Field	Description
Price level 1	The price level that is typically used for standard retail sales.
Price level 2	The price level that is typically used for a slight discount from the retail sales price.
Price level 3	The price level that is typically used for a moderate discount from the retail sales price.
Price level 4	The price level that is typically used for a high discount from the retail sales price.
Price level 5	The price level that is typically used for the greatest discount from the retail sales price.

Petty cash screen

Use the Petty cash screen to record petty cash expenses taken from the cash drawer.

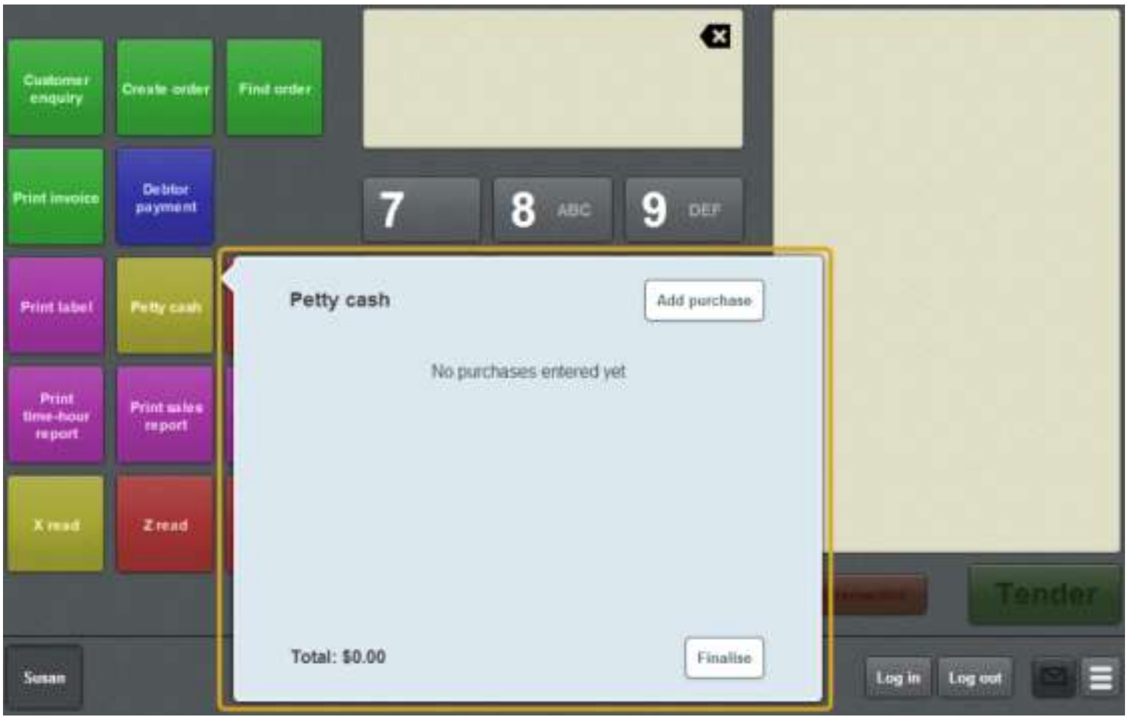
Opening the Petty cash screen

To open the Petty cash screen:

1. Press the **Petty cash** one-shot button.

Note: Your one-shot button configuration may look different to the documentation.

The Petty cash screen is displayed.



Petty cash

No purchases entered yet

Total: $0.00

See *Recording petty cash expenses on the Point of Sale* on page 376

Petty cash screen key fields and buttons

Petty cash area

The petty cash area lists the expenses you have recorded. You can add, edit or delete expenses before finalising.

Field	Description
Add purchase	Press to add another petty cash expense.
250 Purchases $23.45 ⊗ >	The amounts and accounts listed in this petty cash record. **Note:** You can press an expense to edit the amount, or press ⊗ to delete it.
Total	The total amount of the listed petty cash expenses.
Finalise	Press to finalise the record of petty cash expenses.

Purchase details area

Use the purchase details area to select the petty cash account and the amount of the expense.

Field	Description
Back	Return to the Petty cash area when you have finished your selections.
Account	The account the expense is allocated to. **Note:** Press **Account** to select from the list of petty cash general ledger accounts.
Amount	The amount spent on this expense.

Print label screen

Use the Print label screen to print different types of labels for items sold by unit or weight, including:

- Sales labels
- Nutritional information
- Cooking instructions
- Packing labels
- Frozen labels
- Price-embedded barcodes.

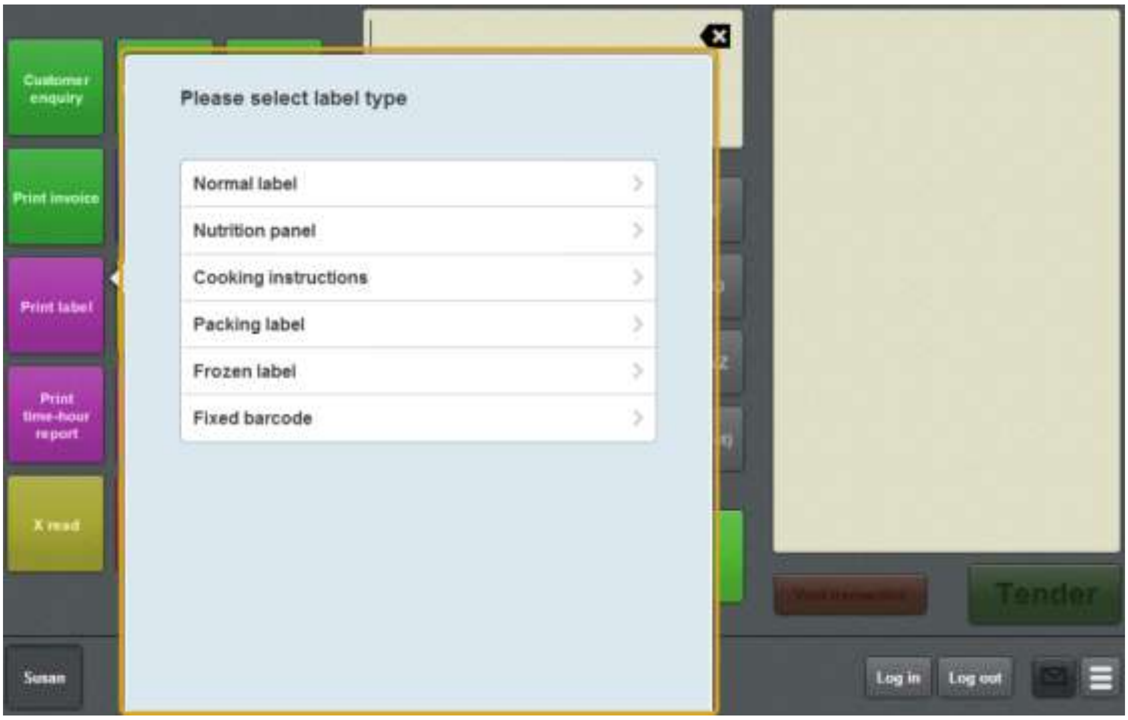
Opening the Print label screen

To open the Print label screen:

1. Press the **Print label** one-shot button.

> **Note:** Your one-shot button configuration may be different to the documentation.

The Label type screen is displayed.



Print label screen key fields and buttons

Select label type area

Use this area to select the type of label to be printed.

Label	Description
Normal label	Press to print a normal item label.
Nutrition panel	Select to print an item's nutrition information.
Cooking instructions	Select to print an item's cooking instructions.
Packing label	Select to print an item's packing label.
Frozen label	Select to print an item's frozen goods label.
Fixed barcode	Select to print a price-embedded barcode for the item.

Label type area

Use this area to select the details to print on the label.

> **Note:** Different fields are displayed depending on whether the selected item is sold by unit or by weight.

Field	Description
Item	Press to select the item the label is printed for.
Best before	Press to select the item's best before date.
Price	Press to change the item price (per unit or weight) to print on the label. **Note:** This does not send the price change back to the portal. To change the price of an item permanently, see *Changing an item's price on the Portal* on page 359.
Quantity	The quantity of items to print on each label. For example, if you are bundling three items to sell together, the quantity is three. **Note:** This field is only displayed for items sold by unit. The quantity of weighed items is determined by the item on the scale.
Tare	The packaging weight to subtract from the item's total weight. See *Taring the scale* on page 418. **Note:** This field is only displayed for items sold by weight.
Weight	The weight of the item to be labelled. **Note:** This field is only displayed for items sold by weight. The weight of the item is taken from the scale and cannot be changed.
Total	The price total for the label, calculated by the price per unit or weight multiplied by the quantity or weight of the item.

Field	Description
Batch number	Press to type in a batch number to identify the labels.
Use alternative design	Select if you want to use a custom label design instead of the standard.
Labels to print	Press to select how many labels to print. For example, if you have twenty bundles of items to sell, the **Labels to print** field is twenty. **Note:** This field is only displayed for items sold by unit.

User messages screen

Use the User messages screen to read messages sent via the Portal.

Opening the User messages screen

To open the User messages screen:

1. Press ✉ on the Transaction screen

> **Note:** You can still open the User messages screen even if the button is not glowing.

The User messages screen is displayed.

Sandra Boyd
Reminder: Promotion

Please select a message to view

See *Reading user messages* on page 380.

User messages screen key fields and buttons

Field	Description
 Sandra Boyd Reminder: Promotion	The name of the person who sent the message via the portal, and the subject line of the message.
Message body	This field displays the body of the message. The font and style of the text is determined with the message is created on the Portal.
Close	Close the User messages screen. Read messages remain until the Point of Sale is reloaded.

Selling and refunding items

Add items, refunds, loyalty cards and gift vouchers to the Transaction list and record transactions in the Point of Sale.

Key concepts

Please see the *Glossary* on page 649 for information relating to the following terms:

Appointment
Discount
Gift voucher
Item
Item field
Item options
Loyalty
Loyalty card
One-shot button
One-shot button page
Operator
Point of Sale
Price override
Quantity
Refund
Scale
Supervisor
Terminal
Transaction
Transaction line
Transaction list
Void

Also see the *Transaction screen* on page 455.

Note: Your Transaction screen may look different if your Point of Sale is in Scales certification compliance mode or you have enabled the large display. See *Scales certification compliance mode* on page 644.

What you can do:

The following topics explain the tasks related to adding items to transactions:

- *Finding an item* on page 411.
- *Selling an item by unit* on page 414.
- *Selling an item by weight* on page 416.
- *Taring the scale* on page 418.
- *Creating gift vouchers* on page 421.
- *Refunding an item* on page 424.
- *Returning a gift voucher* on page 427.
- *Changing an item's quantity* on page 429.
- *Adding options to items* on page 432.
- *Applying a discount to an item* on page 434.
- *Setting a transaction as tax exempt* on page 439.
- *Removing or changing a discount from an item* on page 437.
- *Overriding the price of an item* on page 441
- *Adding a loyalty card* on page 444.
- *Printing an item's instructions* on page 446.
- *Parking a transaction* on page 448.
- *Restoring a parked transaction* on page 449.
- *Voiding an item* on page 451.
- *Voiding a transaction* on page 453.

The following topics explain other tasks related to using the terminal:

- *Logging in to the terminal* on page 348.
- *Logging out of the terminal* on page 346.
- *Recording a no-sale* on page 354.
- *Recording an advance* on page 355.
- *Recording a handover* on page 357.

Also see *Basic terminal functions* on page 343.

Finding an item

Find an item if you want to look up its price or add it to a transaction.

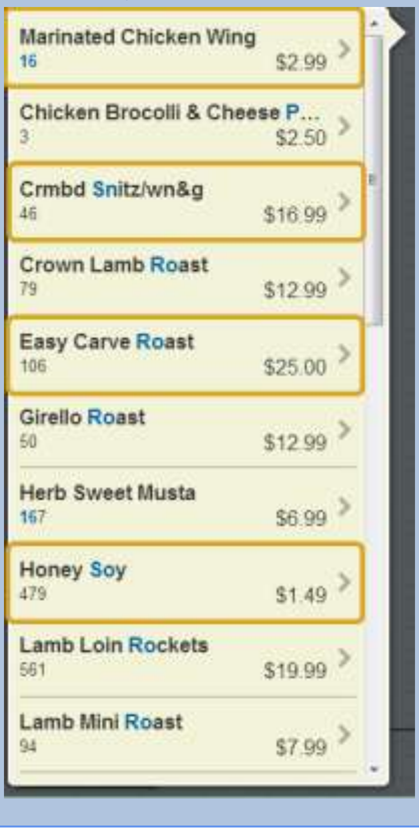
> **Note:** Your Transaction screen may look different if your Point of Sale is in Scales certification compliance mode or you have enabled the large display. See *Scales certification compliance mode* on page 644.

When you press the keypad numbers or type using an external keyboard, the Point of Sale automatically searches for items that match.

Matches are made:

- From the beginning of any word in the description, ignoring whether letters are upper or lower case.

  > **Note:** Each number on the keypad also corresponds to the three or four letters of the alphabet displayed below the number. For example, **16** represents **RO**, **SN**, **SO** and so on.



Marinated Chicken Wing	16	$2.99
Chicken Brocolli & Cheese P...	3	$2.50
Crmbd Snitz/wn&g	46	$16.99
Crown Lamb Roast	79	$12.99
Easy Carve Roast	106	$25.00
Girello Roast	50	$12.99
Herb Sweet Musta	167	$6.99
Honey Soy	479	$1.49
Lamb Loin Rockets	561	$19.99
Lamb Mini Roast	94	$7.99

- From the beginning of any numbers in the description.
- Against the item's barcode.

> **Note:** If the item's barcode has been matched, the Point of Sale displays a barcode icon with the item.

980

Ch & Veg Stirfry

980000322

3.980kg N x $7.99/kg

$31.80

- Against the item's item code.

> **Note:** Search is disabled when you are changing an item's price, quantity or setting a discount.

Advanced search techniques

You can use special characters to refine your search:

- Start the search with **00** to limit the search to only item codes and barcodes.
- Use **.** to match any character that isn't on the keypad, such as punctuation or letters with accent marks.
- Use **0** as a space to search for more than one word at a time.

> **Note:** Only items that match both words are returned, but the words can be in any order in the description. For example, **19908986** matches items with **RED** and **BEAN** in any order in the description.

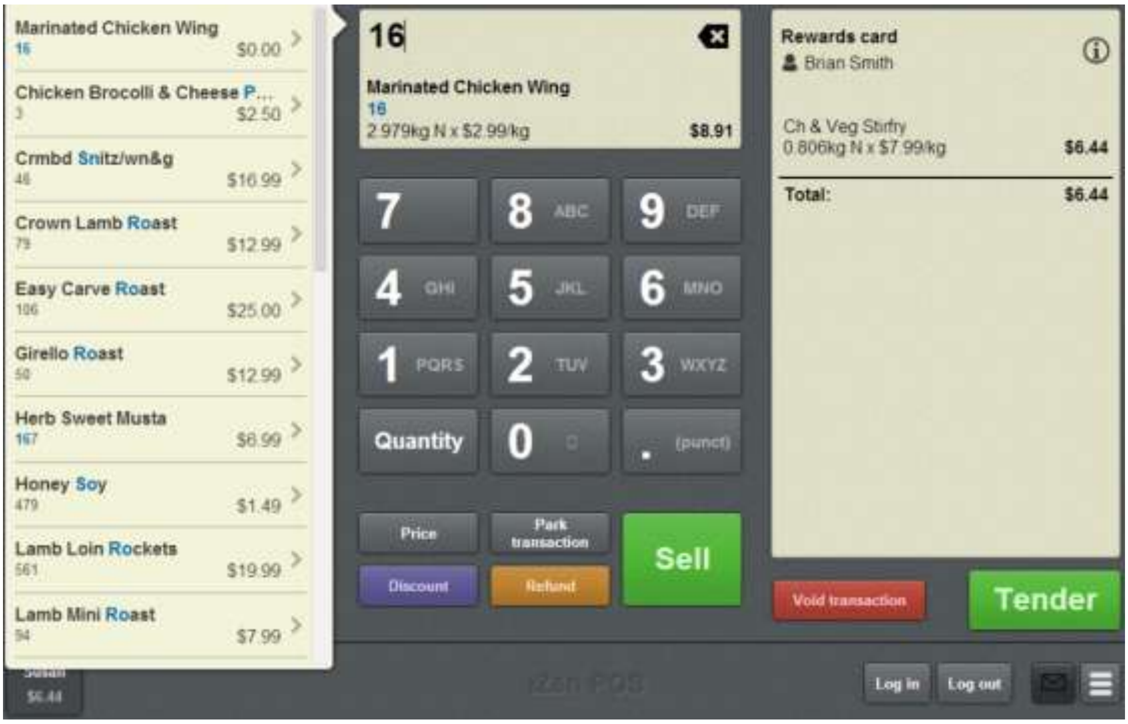
You can also type letters using an external keyboard, which match that character only. For example, typing **r99** matches **RED**, **REE** and **REF** but not **SEE**.

To find an item:

1. Type your search terms using either the keypad or an external keyboard.

> **Note:** If you make a mistake, press the backspace key or the icon to delete the last letter or number. Hold the backspace key or the icon to clear the search.

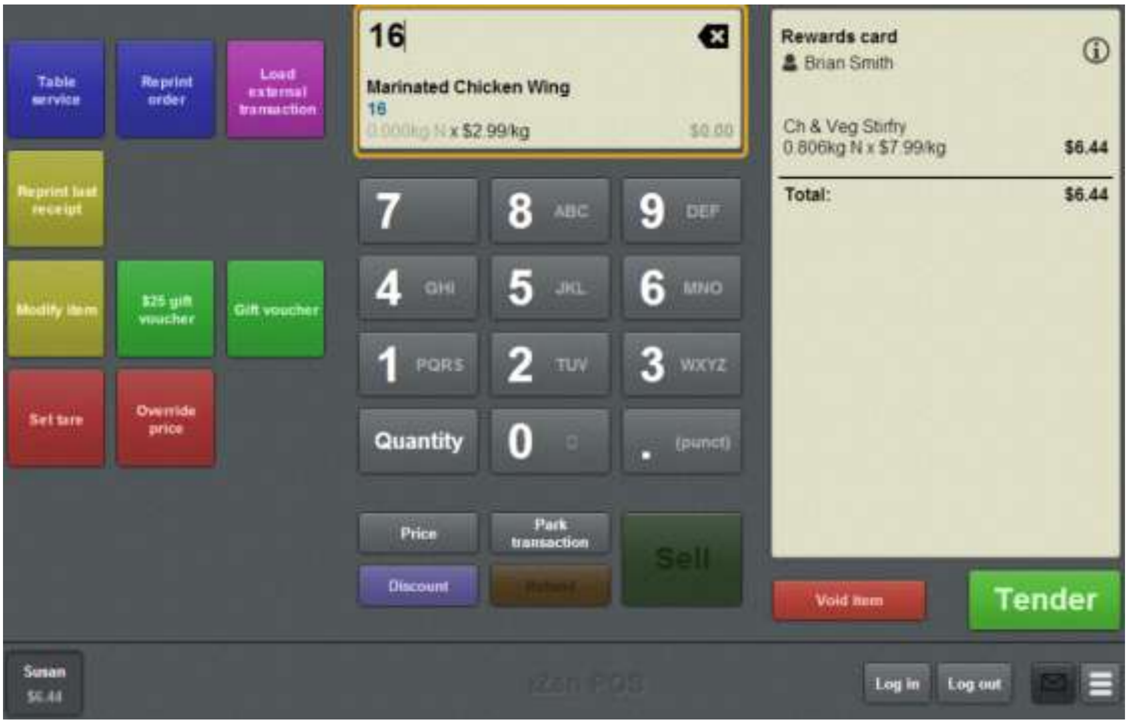
The search results are displayed beside the Item field.



Tip: The first match is automatically displayed in the Item field, and the matching portion of each item's barcode or description is highlighted in the search results.

2. Press the item you want to select.

   The item is displayed in the Item field.



Selling an item by unit

Sell an item that is measured by unit to:

- Add it to the Transaction list.
- Increase its quantity if it is already in the Transaction list.

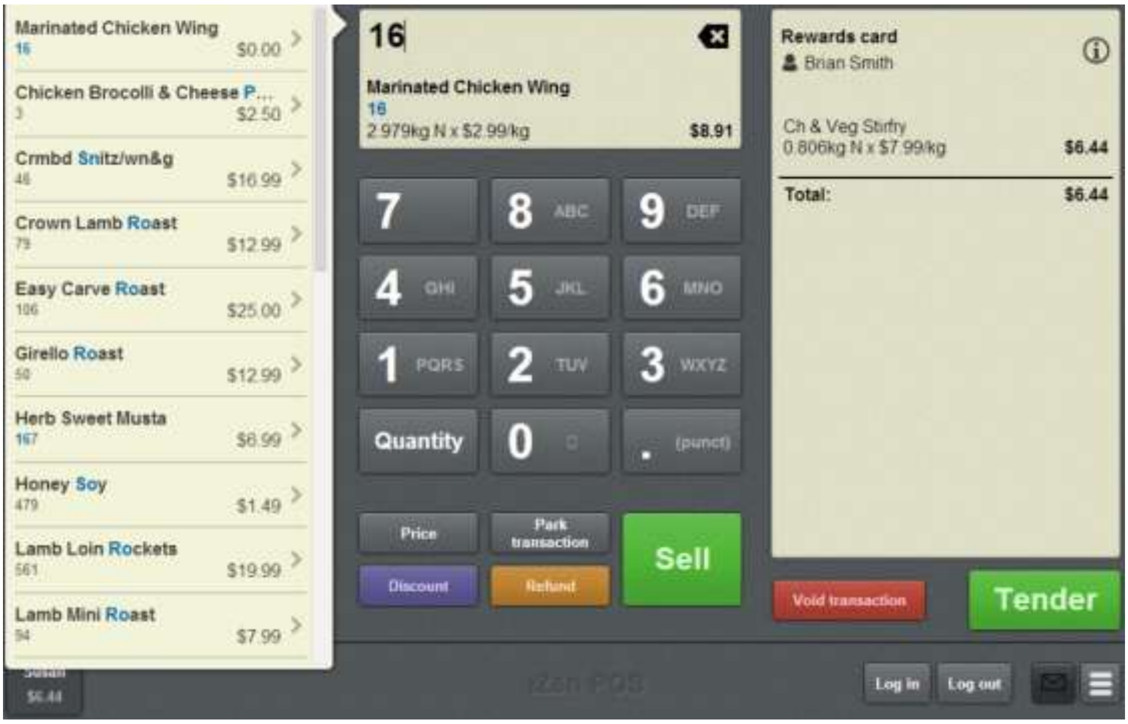
If the item is measured by weight, see *Selling an item by weight* on page 416

Note: If a promotion or special has been configured on the Portal, it is automatically applied at the Point of Sale.

Note: Your Transaction screen may look different if your Point of Sale is in Scales certification compliance mode or you have enabled the large display. See *Scales certification compliance mode* on page 644.

To sell an item:

1. Search for the item by scanning or typing the barcode.



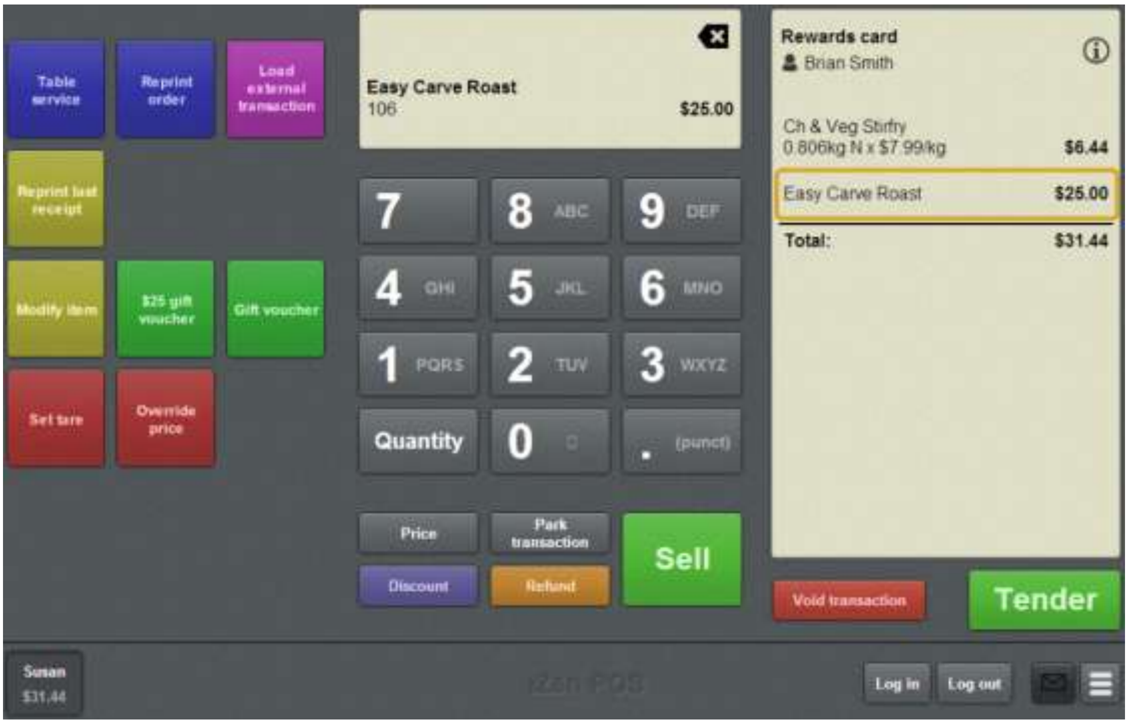
See *Finding an item* on page 411.

2. If you want to edit the item's price or quantity, or add a discount, see:
   - *Applying a discount to an item* on page 434.
   - *Overriding the price of an item* on page 441.
   - *Changing an item's quantity* on page 429.

   You can also make these changes after the item is added to the Transaction list.

3. Either:
   - Press the item in the search results.
   - Press Sell if the item is displayed in the Item field.

   The item is added to the Transaction list.



Easy Carve Roast
106 $25.00

Rewards card
Brian Smith

Ch & Veg Stirfry 0.806kg N x $7.99/kg	$6.44
Easy Carve Roast	$25.00
Total:	$31.44

Note: If you wanted to refund this item, press Refund. See *Refunding an item* on page 424.

Tip: If you want to add more than one unit of this item, you can press Sell again or change the quantity directly. See *Changing an item's quantity* on page 429.

Selling an item by weight

Sell an item that is measured by weight to add it to the Transaction list. Items sold by weight must be measured on an integrated scale, and their quantity cannot be overridden. However, you can override the tare weight of the item if required.

See *Taring the scale* on page 418.

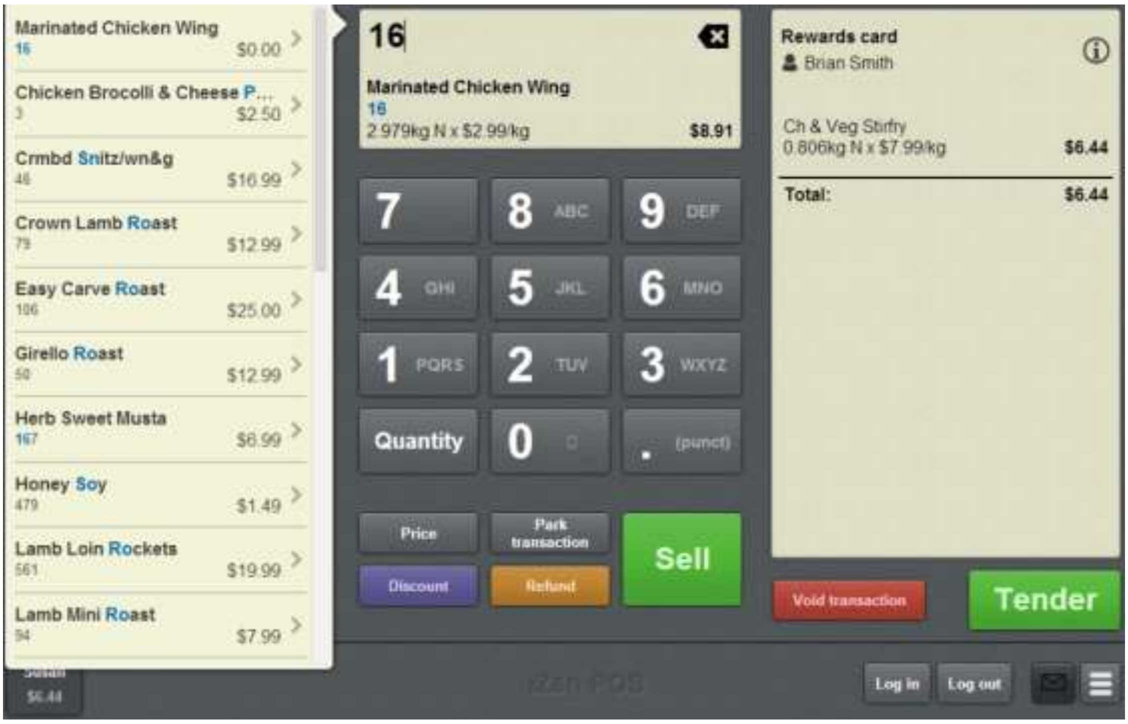
If the item is measured by unit, see *Selling an item by unit* on page 414.

> **Note:** If a promotion or special has been configured on the Portal, it is automatically applied at the Point of Sale.

> **Note:** Your Transaction screen may look different if your Point of Sale is in Scales certification compliance mode or you have enabled the large display. See *Scales certification compliance mode* on page 644.

To sell an item by weight:

1. Place the item on the connected scale.
2. Search for the item by scanning or typing the barcode.



See *Finding an item* on page 411.

3. If the item is not displayed in the Item field, select it from the search list.
4. If you want to add a discount or edit the item's price, see:
    - *Applying a discount to an item* on page 434.

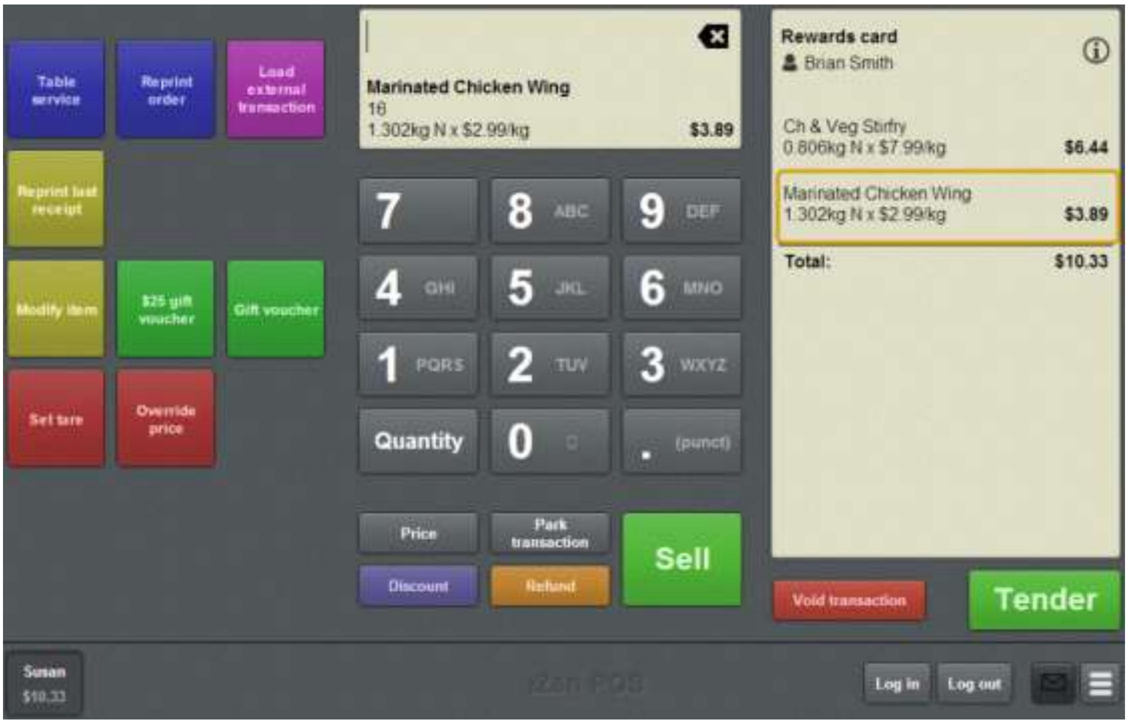
- *Overriding the price of an item* on page 441.

You can also make these changes after the item is added to the Transaction list.

> **Note:** You cannot change the quantity of an item sold by weight.

5. Wait until the scale has finalised the item's weight.
6. Press Sell.

The item is added to the Transaction list.



Marinated Chicken Wing
16
1.302kg N x $2.99/kg $3.89

Rewards card
Brian Smith

Ch & Veg Stirfry
0.806kg N x $7.99/kg $6.44

Marinated Chicken Wing
1.302kg N x $2.99/kg $3.89

Total: $10.33

> **Note:** If you want to refund this item, press Refund. See *Refunding an item* on page 424.

Taring the scale

Tare the scale when the item packaging is different to the normal package weight recorded by the Portal.

For example: an item sold-by-weight is normally pre-packaged into standard packets that weighs 9g. The tare weight for this items on the Portal is 9g, so when the item is weighed for sale, the Point of Sale subtracts 9g from the total weight to charge the customer for the nett weight purchased. However, at your site, some packages were damaged in transit, and you have repackaged those items in different packets that weigh 25g. You can tare the scale to 25g for these items, so that the Point of Sale subtracts 25g from the total weight of these items, instead of the standard 9g.

> **Note:** The scale is reset to its normal tare defined in the Portal for each new item. Taring the scale only affects the item selected in the Transaction list and does not affect the default tare listed on the Portal for the item.

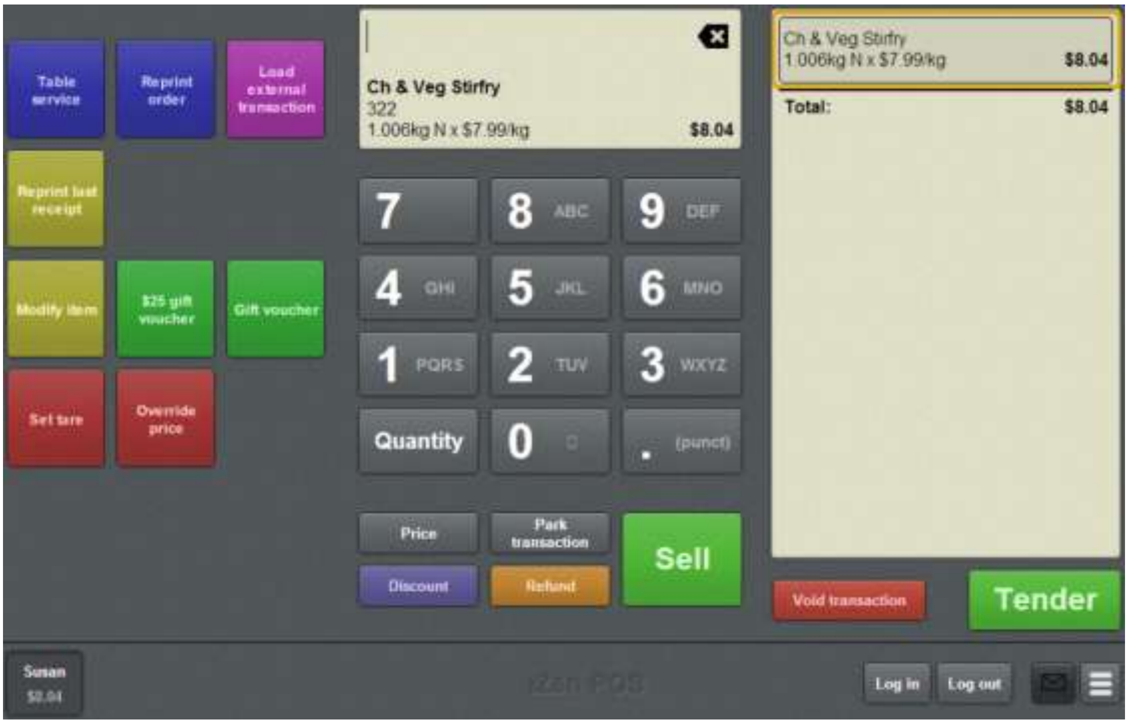
> **Note:** You must have a one-shot button configured to tare the scale. See *Create a one-shot button to tare the scale* on page 300.

To tare the scale:

1. Add an item to the transaction.

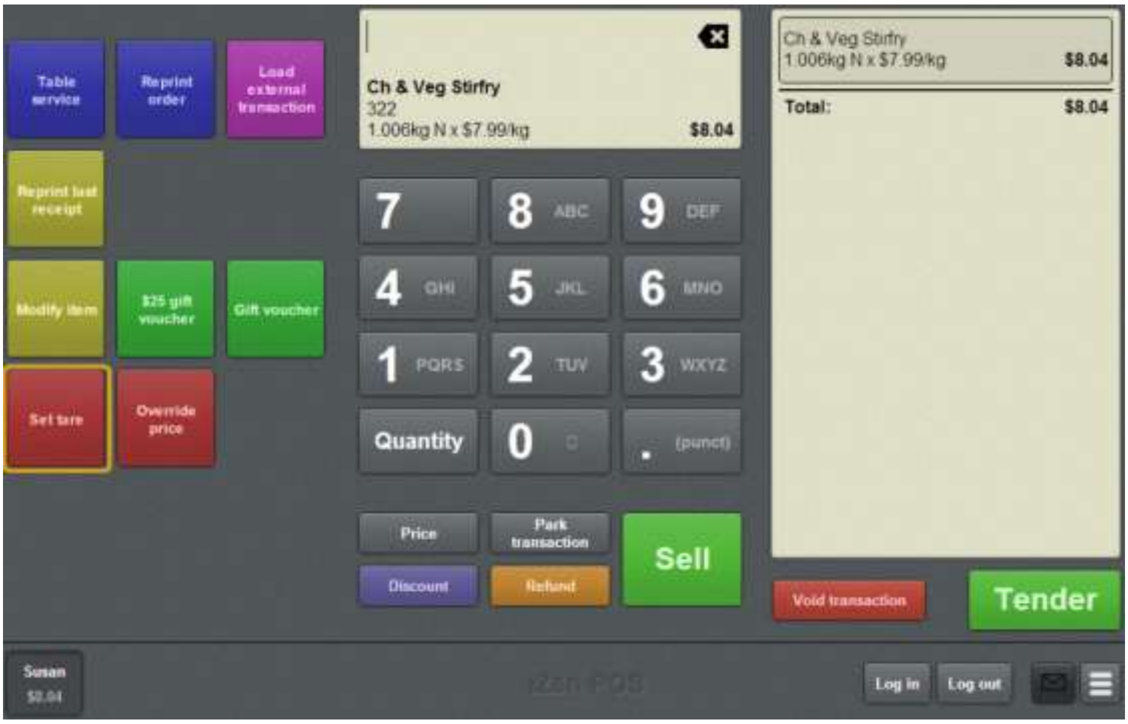
   See *Selling an item by weight* on page 416.

2. Select the item you want to tare the scale for.



> **Note:** The item must already be in the Transaction list. You cannot tare the scale for an item that has not been added.

3. Press the **Set tare** one-shot button.



Ch & Veg Stirfry
322
1.006kg N x $7.99/kg $8.04

Ch & Veg Stirfry
1.006kg N x $7.99/kg $8.04
Total: $8.04

> **Note:** The one-shot buttons on your Point of Sale may appear differently to the documentation.

4. Type in the nett weight of the item's packaging.
5. Press OK.

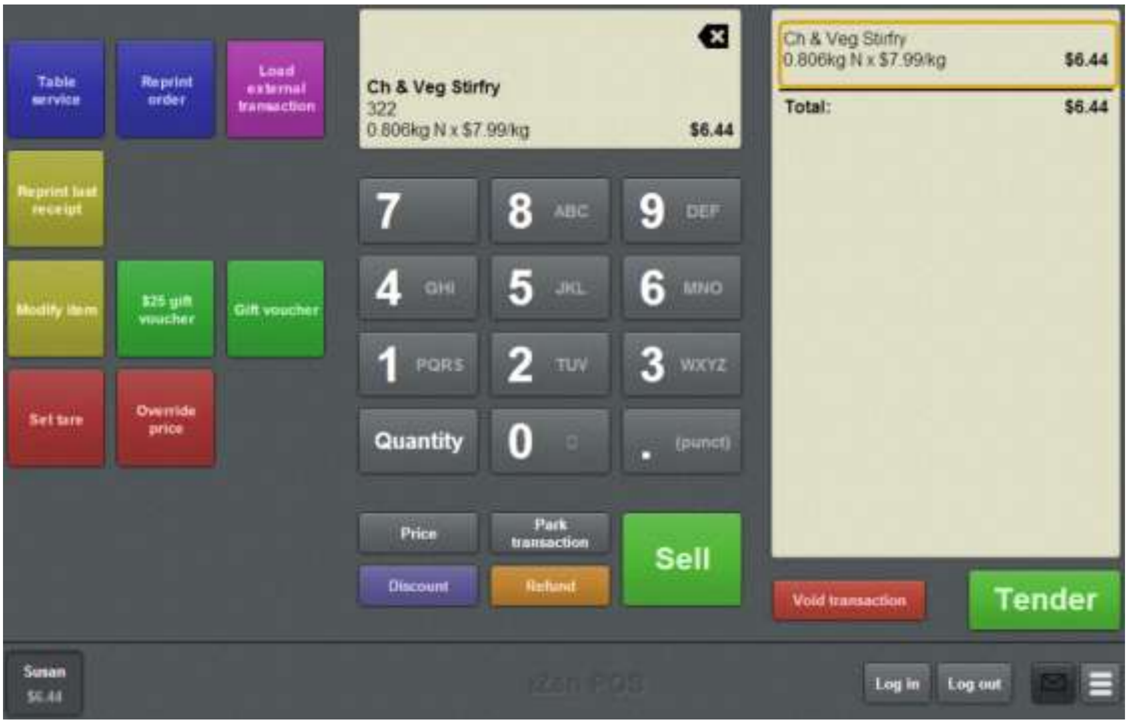
Tare: 200g

Ch & Veg Stirfry
322
1.006kg N x $7.99/kg $8.04

Ch & Veg Stirfry
1.006kg N x $7.99/kg $8.04

Total: $8.04

The excess packaging weight is subtracted.



Ch & Veg Stirfry
322
0.806kg N x $7.99/kg $6.44

Ch & Veg Stirfry
0.806kg N x $7.99/kg $6.44

Total: $6.44

6. Continue the transaction as normal.

   See *Selling and refunding items* on page 409.

Creating gift vouchers

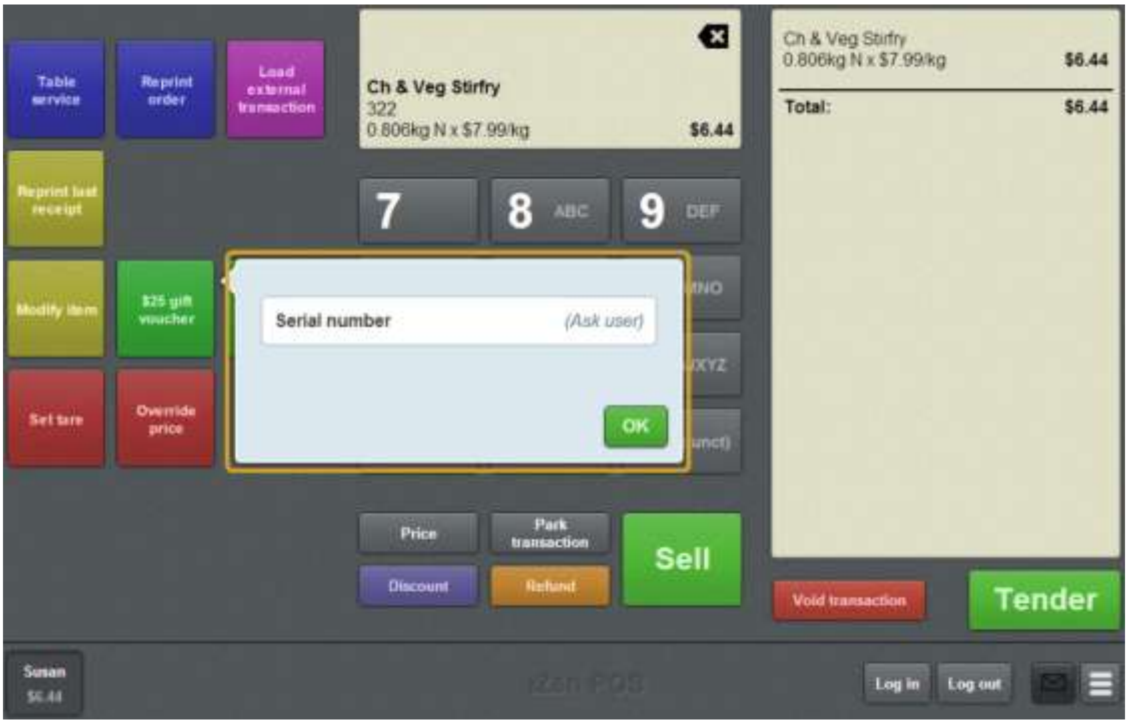
Create a gift voucher when a customer wants to purchase one in a transaction.

> **Note:** Gift vouchers must be configured as one-shot buttons on your Point of Sale. See *Setting up gift vouchers on the Point of Sale* on page 22.

> **Note:** Gift vouchers cannot be sold if the terminal is offline.

To create a gift voucher:

1. Press the one-shot button for the gift voucher you want to create.
2. The Gift voucher sale screen is displayed.



Ch & Veg Stirfry
322
0.806kg N x $7.99/kg $6.44

Ch & Veg Stirfry
0.806kg N x $7.99/kg $6.44
Total: $6.44

Serial number (Ask user)

3. Type in the **Amount**.

> **Note:** If your gift voucher buttons have the amount configured, the Gift voucher sale window only prompts for the **Serial number**.

4. Type in the **Serial number** printed on the gift voucher.

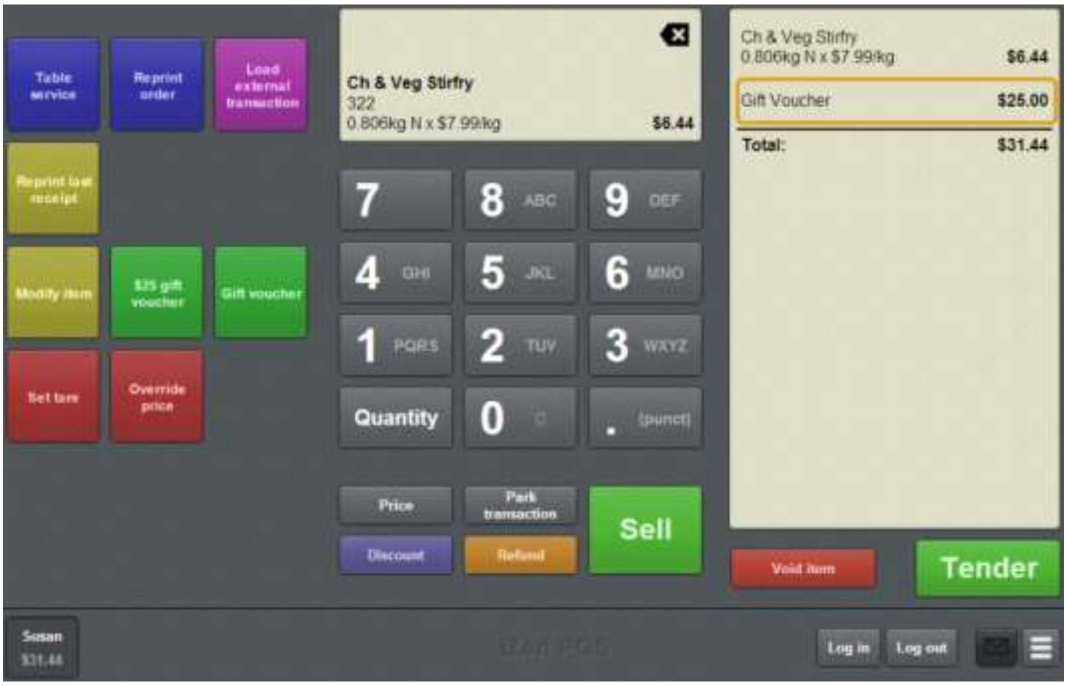
> **Note:** Make sure the **Serial number** and **Amount** are correct, as the Portal checks the **Amount** and **Serial number** when the gift voucher is redeemed.

5. Press OK.

The gift voucher is submitted to the Portal.

The Transaction list displays either:

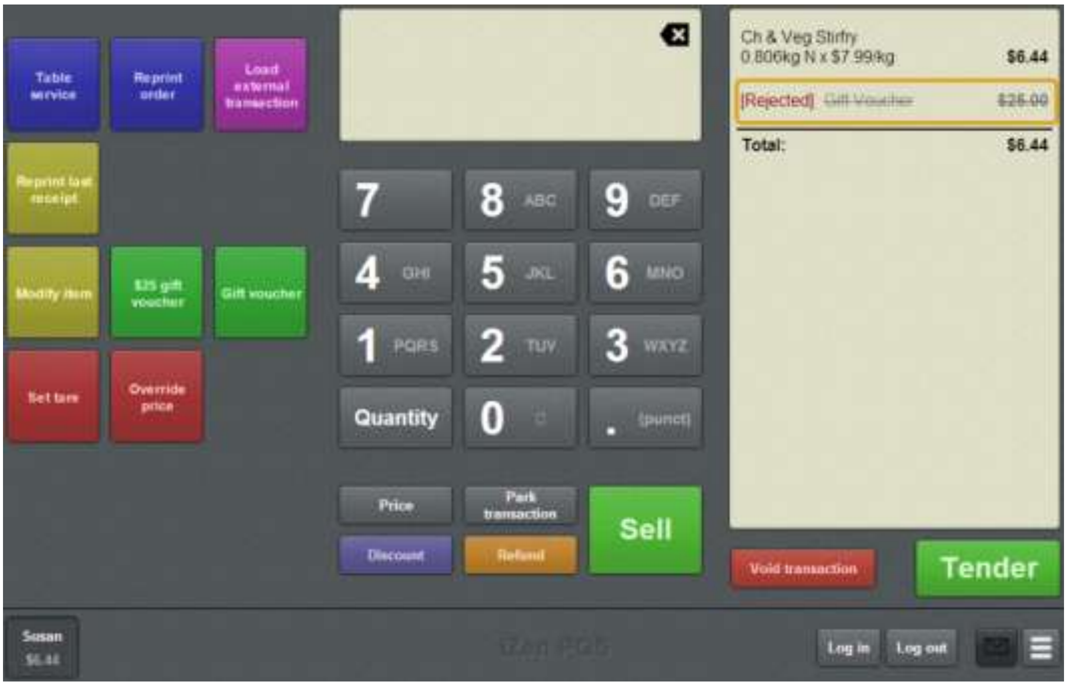
- The accepted gift voucher.



Ch & Veg Stirfry
322
0.806kg N x $7.99/kg $6.44

Ch & Veg Stirfry 0.806kg N x $7.99/kg	$6.44
Gift Voucher	$25.00
Total:	$31.44

- The rejected gift voucher.



Ch & Veg Stirfry 0.806kg N x $7.99/kg	$6.44
[Rejected] ~~Gift Voucher~~	~~$25.00~~
Total:	$6.44

> **Note:** Gift voucher rules are controlled by the Portal. Gift vouchers are rejected if your Portal configuration does not allow charges or recharges.

6. Continue the transaction as normal.

See *Selling and refunding items* on page 409.

Refunding an item

Refund an item to return the payment to the customer and reclaim the item. You can:

- Add new items to a transaction as refunds.
- Select an existing line in the transaction and convert it to a refund.

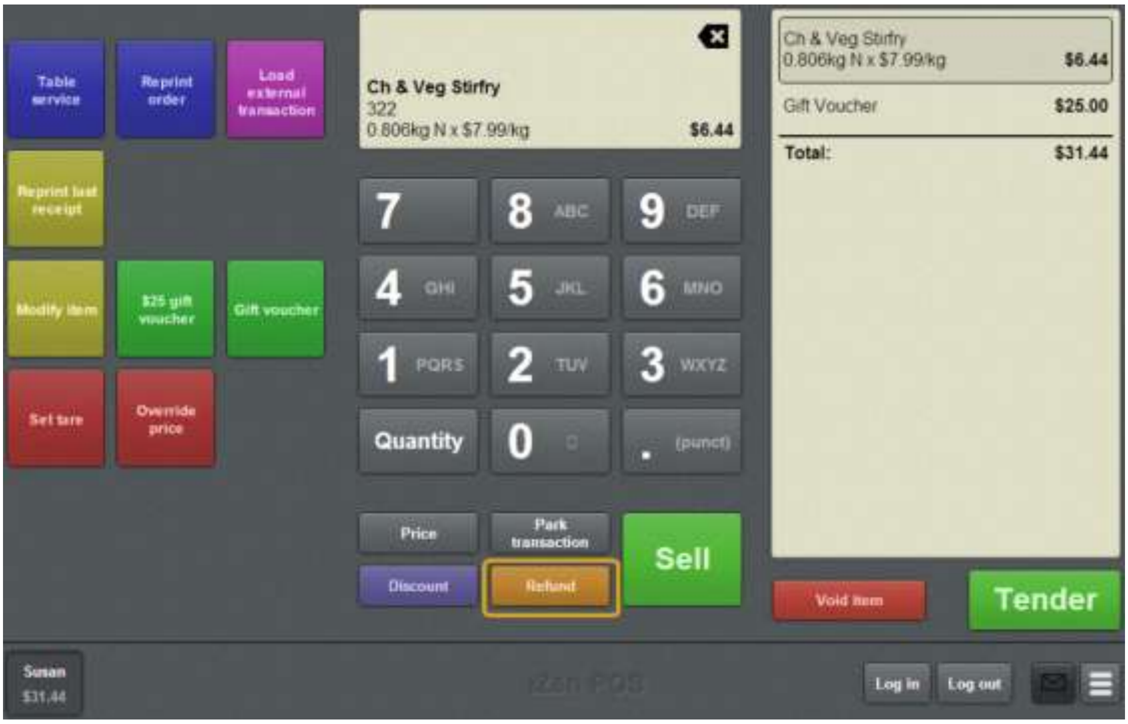
> **Note:** Refunding an item adjusts the Stock On Hand levels for your site. The customer's loyalty balance is also adjusted.

> **Note:** Your Transaction screen may look different if your Point of Sale is in Scales certification compliance mode or you have enabled the large display. See *Scales certification compliance mode* on page 644.
>
> ? **I can't refund this item:** A transaction's total can never be less than the amount tendered. If you've already submitted a tender in the transaction, you can't refund an item if that would make the transaction total less than what's already been tendered.
>
> For example, if the transaction total is $50, and you have already tendered $30, you could refund a $10 item. The transaction total would be $30 (instead of adding that $10 item to the total, it's subtracted). However, you could not refund a $15 item, because that would make the transaction total $20, which is lower than the $30 that has already been tendered.
>
> If you need to refund an item in this situation, you must void the tender, or finalise and then undo the transaction. See *Voiding a tender* on page 490.

To refund an item:

1. Either:
    - Search for the item and add it to the transaction.

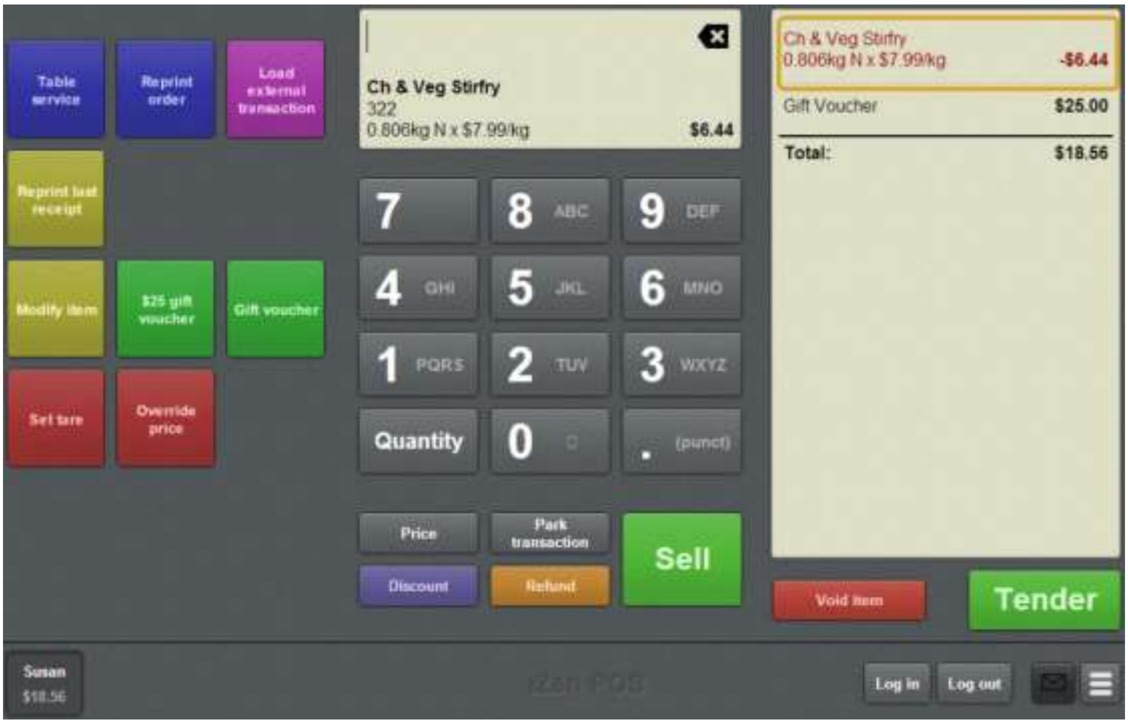
      See *Finding an item* on page 411.
    - Press the item in the Transaction list if it has already been added to the transaction.
2. Press Refund.



Ch & Veg Stirfry
322
0.806kg N x $7.99/kg $6.44

Ch & Veg Stirfry
0.806kg N x $7.99/kg $6.44
Gift Voucher $25.00
Total: $31.44

The refund is added to the Transaction list.



Ch & Veg Stirfry
322
0.806kg N x $7.99/kg $6.44

Ch & Veg Stirfry
0.806kg N x $7.99/kg -$6.44
Gift Voucher $25.00
Total: $18.56

Note: The entire item line is converted into a refund. This means if the line was originally selling three units, it now refunds three units. To edit the quantity of an item, see *Changing an item's quantity* on page 429.

Tip: If you press Refund again, another unit of the item is refunded.

3. Continue the transaction as normal.

   See *Selling and refunding items* on page 409.

Returning a gift voucher

Return a gift voucher if a customer wants to exchange the amount of the gift voucher for a refund.

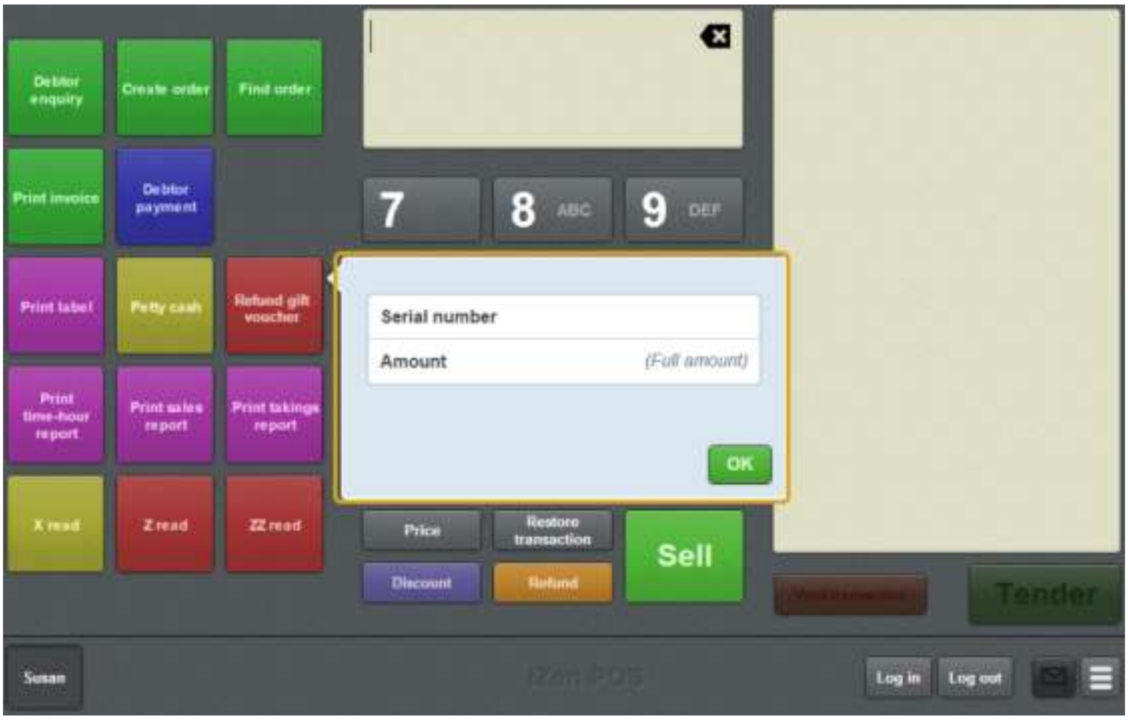
> **Note:** To return a gift voucher, you must have a one-shot button configured to return gift vouchers. See *Creating a one-shot button to return a gift voucher* on page 266.

To return a gift voucher:

1. On the Transaction screen, press the Return gift voucher one-shot button.

> **Note:** Your one-shot buttons may appear differently to the documentation.

2. A popup screen is displayed.



3. Type in the amount to return in the **Amount** field.

> **Note:** The amount to return may have been pre-configured. See *Creating a one-shot button to return a gift voucher* on page 266.

4. Type in the serial number of the gift voucher being returned.

5. Press OK.

   The refund is added to the transaction.

6. Continue the transaction as normal.

   See *Selling and refunding items* on page 409.

   The gift voucher serial number is recorded as returned when the transaction is finalised.

Changing an item's quantity

Change an item's quantity when you want to sell or refund more than one of that item in the transaction.

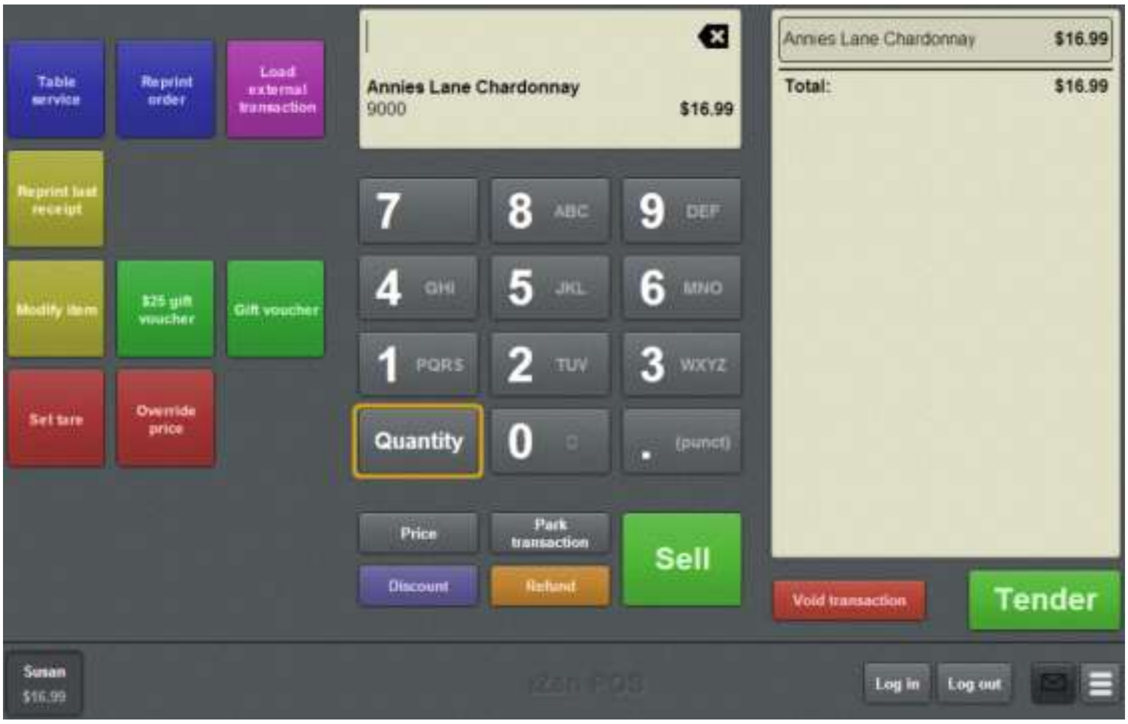
Tip: You can quickly add another unit of a selected item by pressing Sell or Refund. Note that if you have added three units to sell and you press Refund, the Point of Sale does not subtract one unit. Instead, all three units of the item become a refund.

Note: If a promotion or special has been configured on the Portal, it is automatically applied at the Point of Sale.

To change an item's quantity:

1. Either:
    - Search for the item and add it to the transaction.

      See *Finding an item* on page 411.
    - Press the item in the Transaction list if it has already been added to the transaction.
2. Press Quantity.

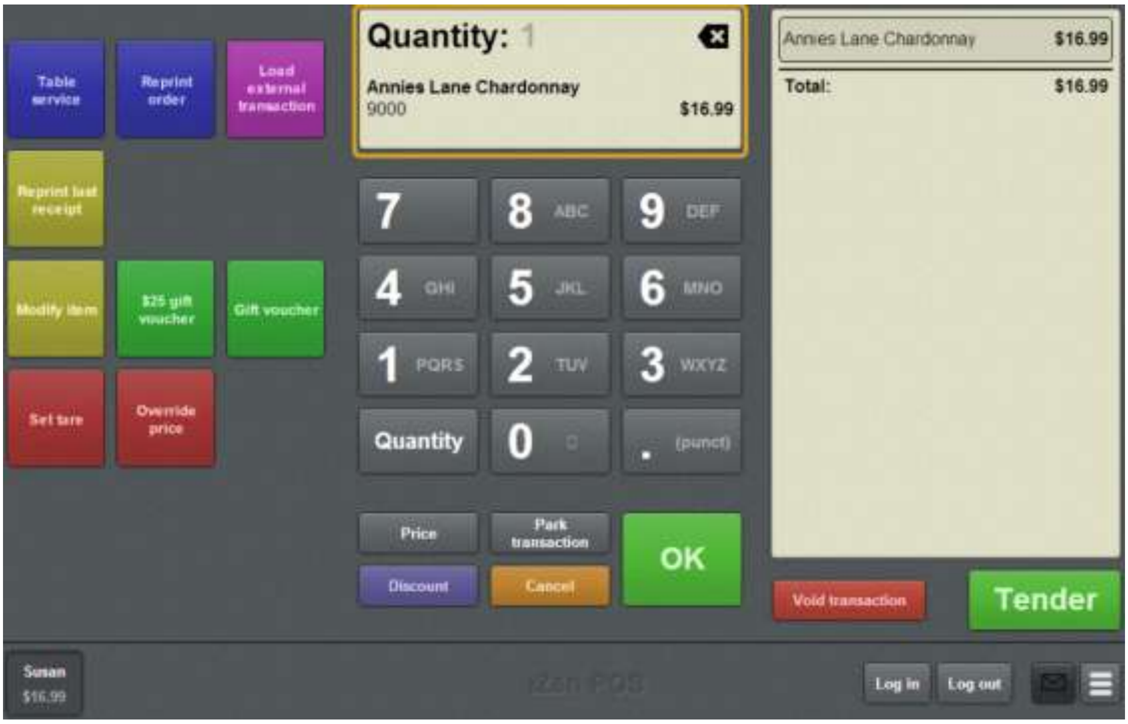


Annies Lane Chardonnay
9000 $16.99

Annies Lane Chardonnay $16.99
Total: $16.99

Susan
$16.99

The Item field displays the item quantity.

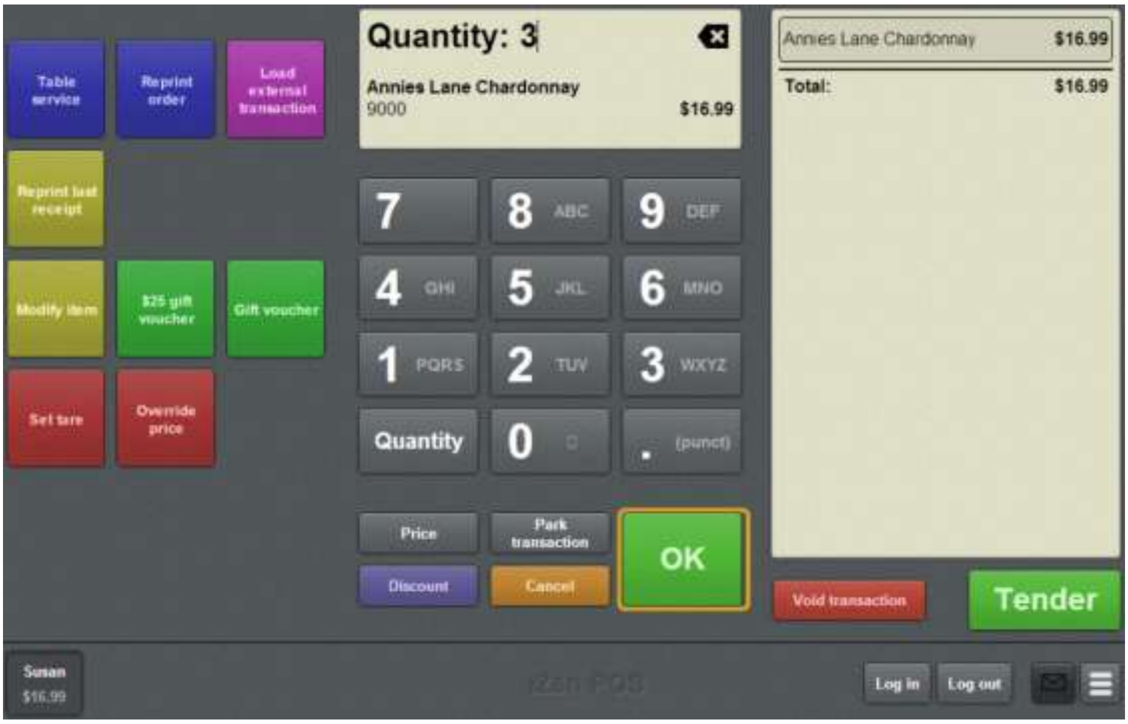


Quantity: 1
Annies Lane Chardonnay
9000 $16.99

Annies Lane Chardonnay $16.99
Total: $16.99

Susan
$16.99

3. Type the total number of units of this item you want to include in the transaction.
4. Press .



The item quantity is set.

If the item was not already in the Transaction list, it is added at the quantity selected.

Note: If you don't want to change the item quantity, press Cancel.

5. Continue the transaction as normal.

   See *Selling and refunding items* on page 409.

Adding options to items

You can add options to items to specify the customer's request. For example, a coffee may be made with soy milk or extra sugar. These options may incur a separate charge.

> **Note:** Item options are configured on the Portal. Not all items can be modified.

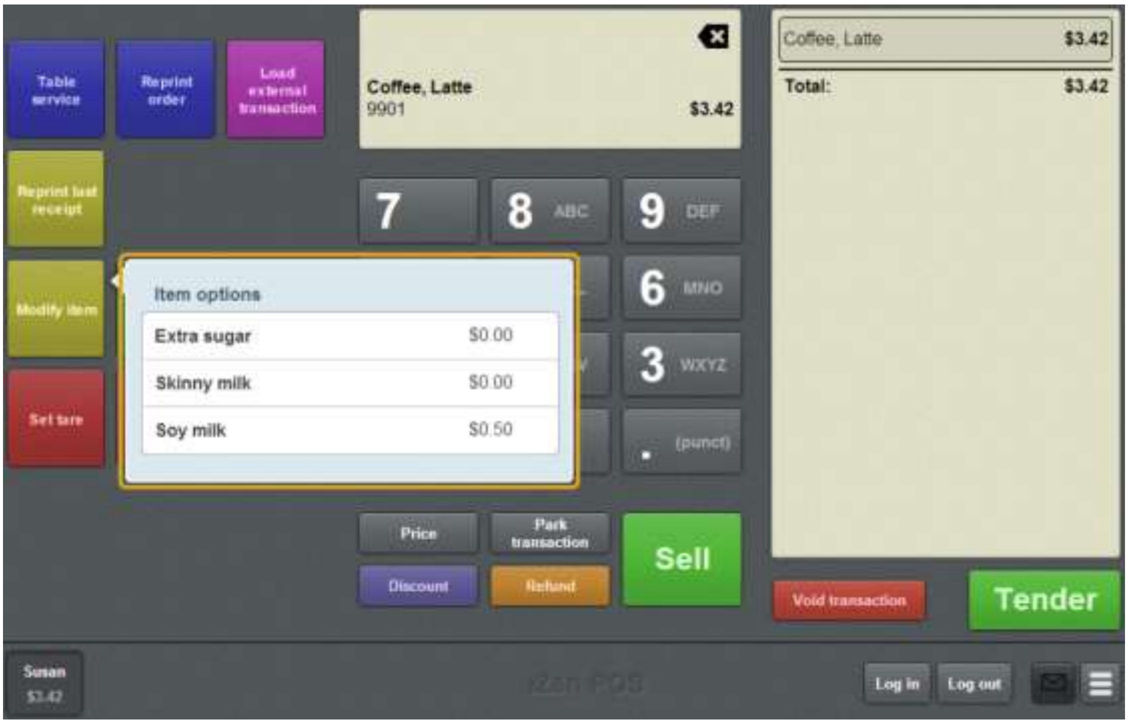
> **Note:** Options can only be added to items if you have a one-shot button configured to modify items. See *Creating a one-shot button to modify items* on page 220.

To add an option to an item:

1. Either:
   - Search for the item and add it to the transaction.

     See *Finding an item* on page 411.
   - Press the item in the Transaction list if it has already been added to the transaction.
2. Press the **Modify item** one-shot button.

   The Item options screen displays the available options for the item.



Coffee, Latte
9901 $3.42

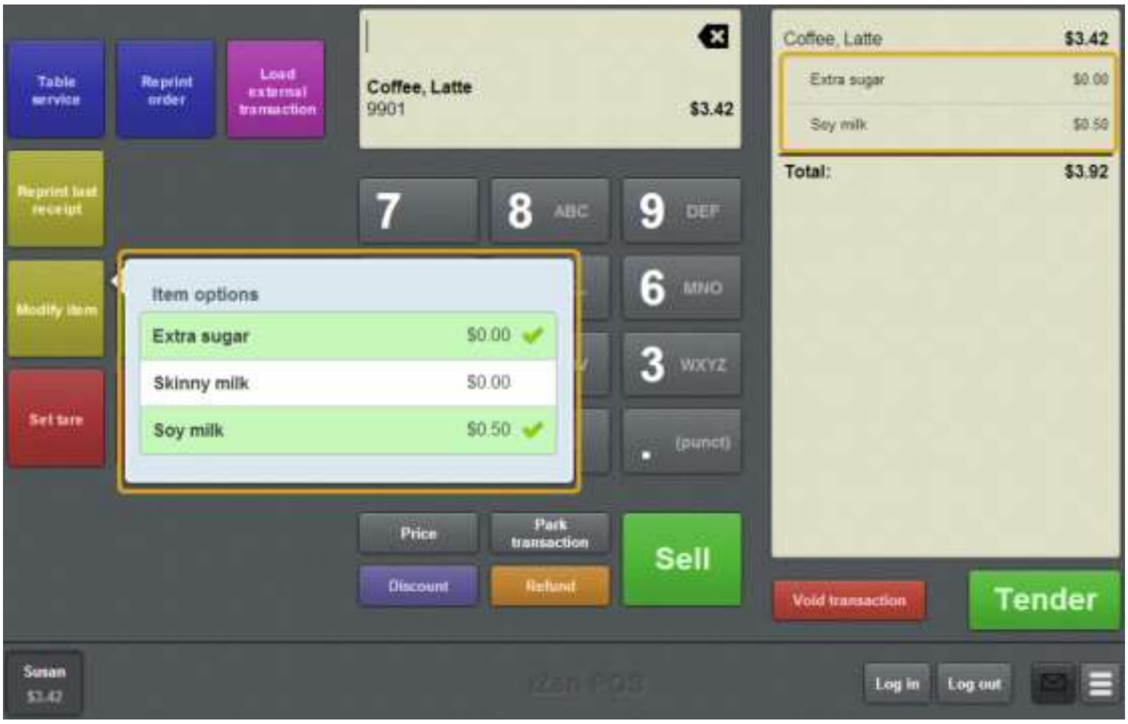
Item options

Extra sugar	$0.00
Skinny milk	$0.00
Soy milk	$0.50

Coffee, Latte	$3.42
Total:	$3.42

3. Press the options you want to add to the item.

   The options are added to the Transaction list below the item, and any additional charges are added to the total.



> **Note:** If you want to edit an item option, for example to change its quantity or price or add a discount, you can edit it like a normal item by selecting it in the transaction. See *Changing an item's quantity* on page 429. Also see *Overriding the price of an item* on page 441 and *Applying a discount to an item* on page 434.

4. Continue the transaction as normal.

   See *Selling and refunding items* on page 409.

Applying a discount to an item

Apply a discount to an item to calculate a new price by the rules of the selected discount.

> **Note:** Discounts can be applied to individual items or to the whole transaction. To apply a discount to all items in a transaction, see *Discounting a transaction* on page 487.

Discounts can:

- Subtract a percentage of the item's price.
- Subtract a set amount from the item's price.
- Cap the item's price to a set amount.
- Subtract a percentage of the item's pre-tax price.
- Subtract the item's tax.

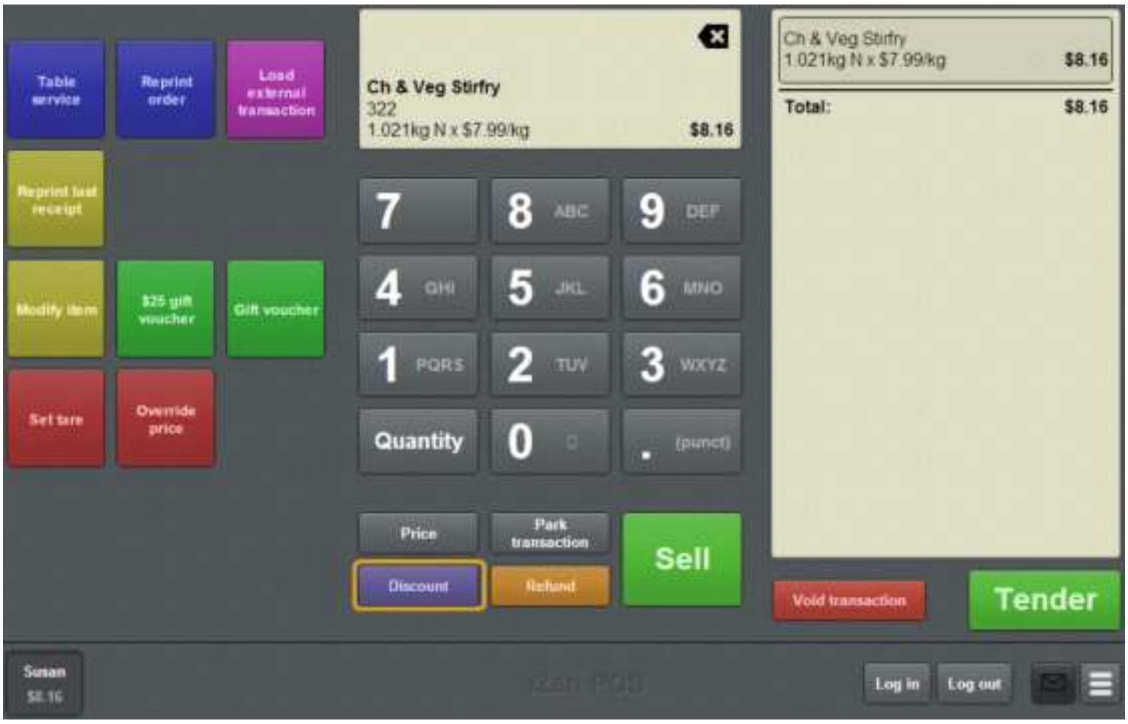
> **Note:** If a promotion or special has been configured on the Portal, it is automatically applied at the Point of Sale.

> **Note:** Special discounts such as some senior citizens or disability discounts make an item tax exempt. If a tax exempt discount is applied, the customer must supply their Senior Citizen or Tax Exempt ID during the tender process in order to receive the discount. The Point of Sale displays the discount as if from the normal tax-inclusive price.

To discount an item:

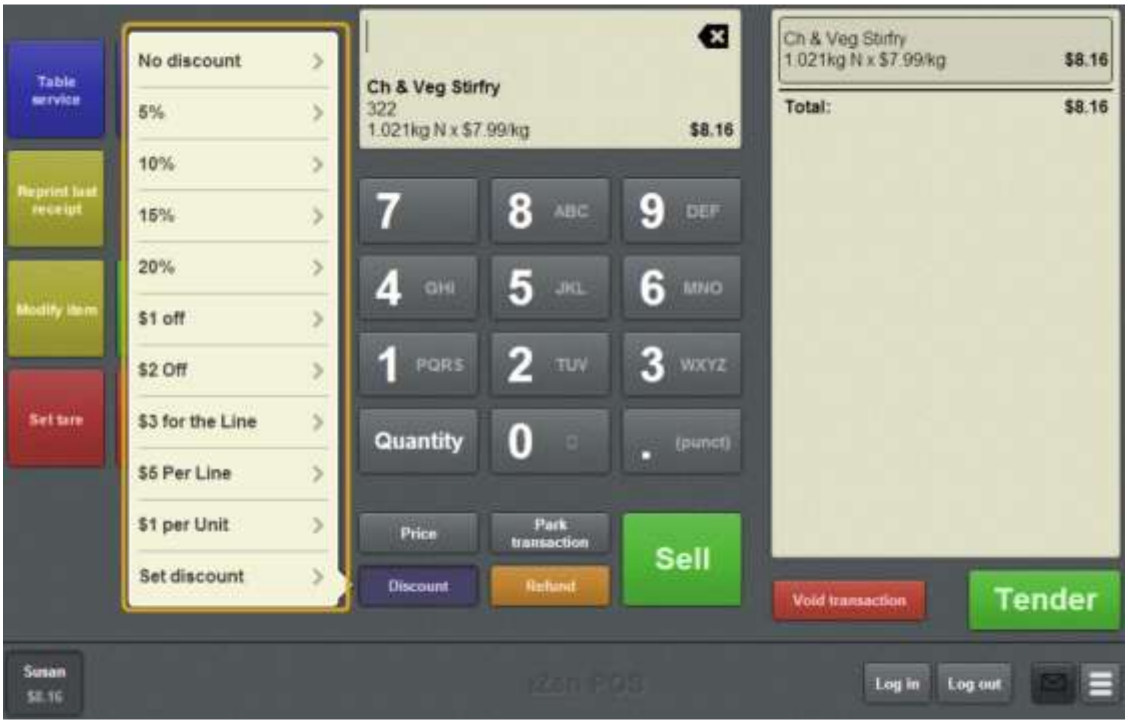
1. Either:
    - Search for the item and add it to the transaction.

      See *Finding an item* on page 411.
    - Press the item in the Transaction list if it has already been added to the transaction.
2. Press Discount.


Ch & Veg Stirfry
322
1.021kg N x $7.99/kg $8.16

Ch & Veg Stirfry
1.021kg N x $7.99/kg $8.16
Total: $8.16

The Discount list is displayed.

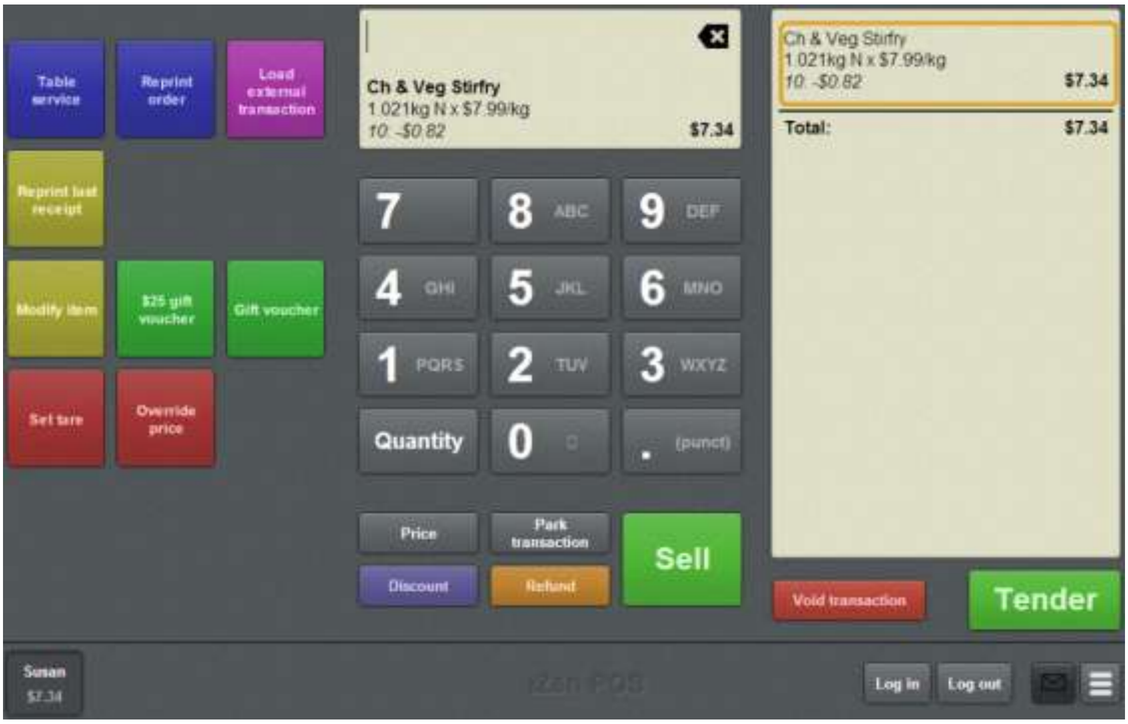

Ch & Veg Stirfry
322
1.021kg N x $7.99/kg $8.16

Ch & Veg Stirfry
1.021kg N x $7.99/kg $8.16
Total: $8.16

> **Note:** The discounts available depend on your Portal configuration.

3. Press the discount you want to apply.

   The Item field displays the applied discount.



Ch & Veg Stirfry
1.021kg N x $7.99/kg
10: -$0.82 $7.34

Ch & Veg Stirfry
1.021kg N x $7.99/kg
10: -$0.82 $7.34

Total: $7.34

> **Note:** Some items may have discount maximums. If the discount you select is greater than the maximum discount allowed for the item, the item is only discounted up to its maximum level.
>
> **Note:** Depending on your Point of Sale configuration, you may need a supervisor's authorisation. If you are a supervisor, you may need authorisation from another supervisor.

4. Continue the transaction as normal.

   See *Selling and refunding items* on page 409.

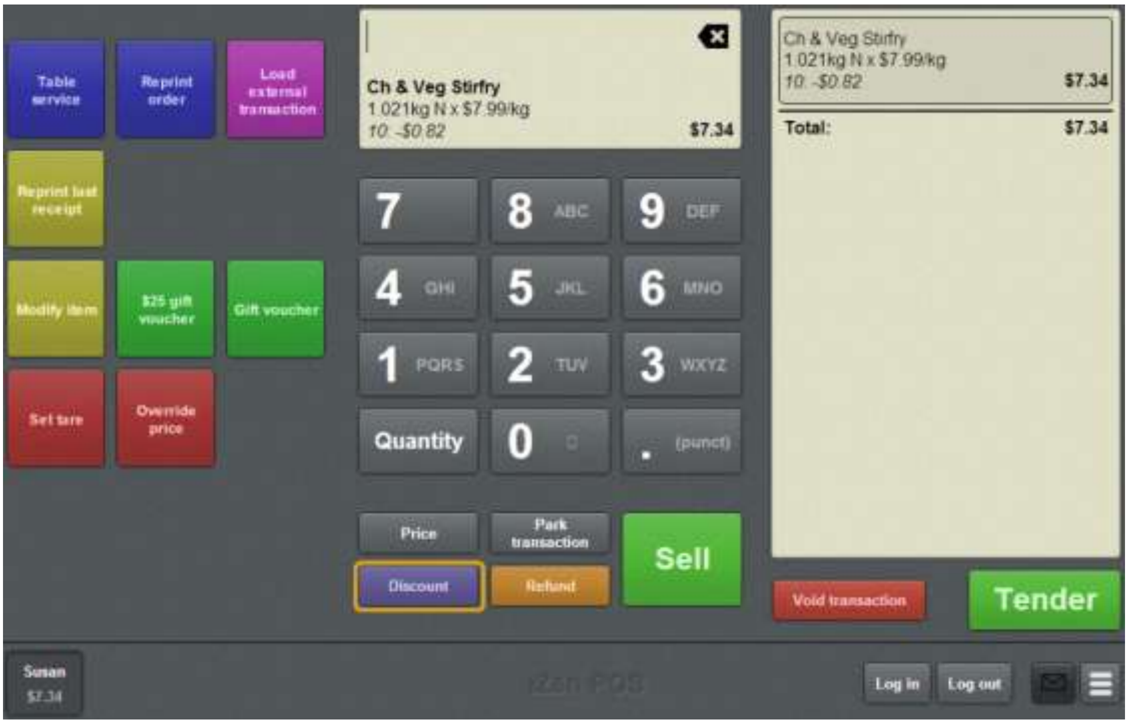
Removing or changing a discount from an item

You can remove or change a discount on an item after it has been applied.

> **Note:** If a promotion or special has been configured on the Portal, it is automatically applied at the Point of Sale.

To remove a discount from an item:

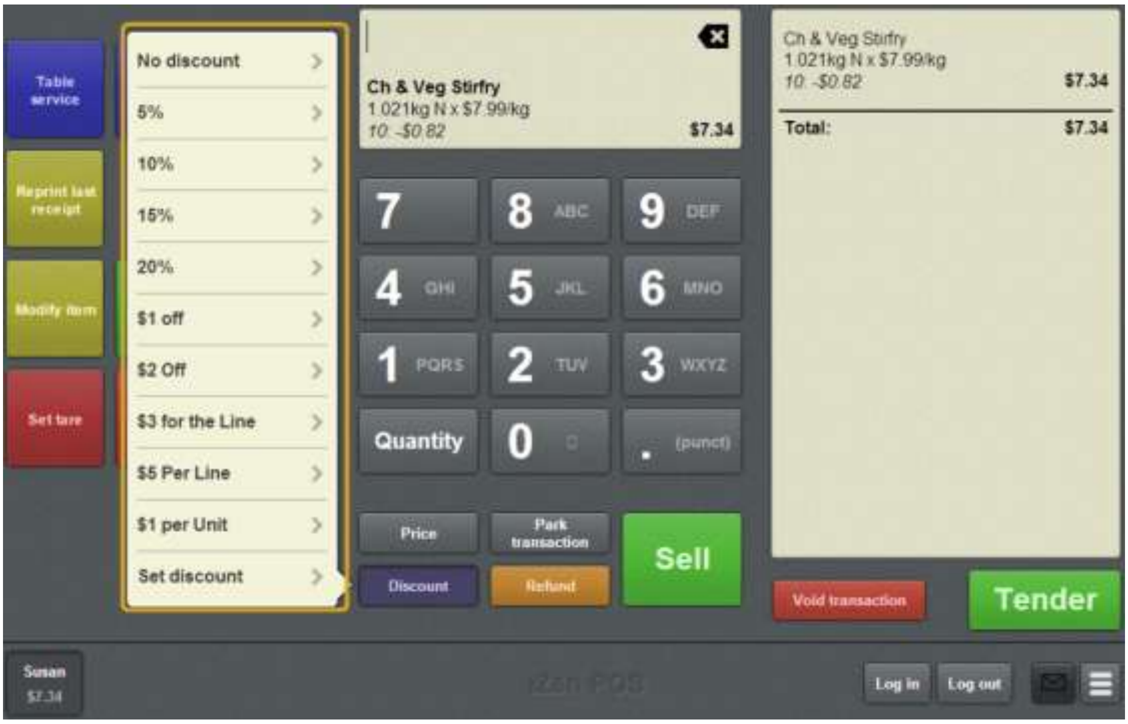
1. Select the item in the Transaction list
2. Press Discount.



Ch & Veg Stirfry
1.021kg N x $7.99/kg
10: -$0.82 $7.34

Total: $7.34

3. The Discount list is displayed.



Ch & Veg Stirfry
1.021kg N x $7.99/kg
10: -$0.82 $7.34

Ch & Veg Stirfry
1.021kg N x $7.99/kg
10: -$0.82 $7.34
Total: $7.34

4. Press either:
   - The discount that you want to apply to this item.
   - **No discount** to remove the discount from this item.

   The Item field displays the updated item.

> **Note:** Some items may have discount maximums. If the discount you select is greater than the maximum discount allowed for the item, the item is only discounted up to its maximum level.

5. Continue the transaction as normal.

   See *Selling and refunding items* on page 409.

Setting a transaction as tax exempt

You can set a transaction as tax exempt using a one-shot button. Tax exempt transactions remove the cost of all taxes from items. You can set a transaction as:

- Tax exempt, by pressing the one-shot button once.

  The tax exempt mode is displayed and the button stays pressed.

- Tax-inclusive (normal), by pressing the one-shot button a second time.

  The normal mode is displayed and the button is un-pressed.

> **Note:** Setting a transaction as tax exempt requires a one-shot button configured to set tax exempt status. See *Creating a one-shot button to make a transaction exempt from tax* on page 308.

> **Note:** Setting a transaction as tax exempt requires the customer to provide their Tax Exempt ID during the tender process. See *Recording a tax exempt ID during tender* on page 500.

To set a transaction as tax exempt:

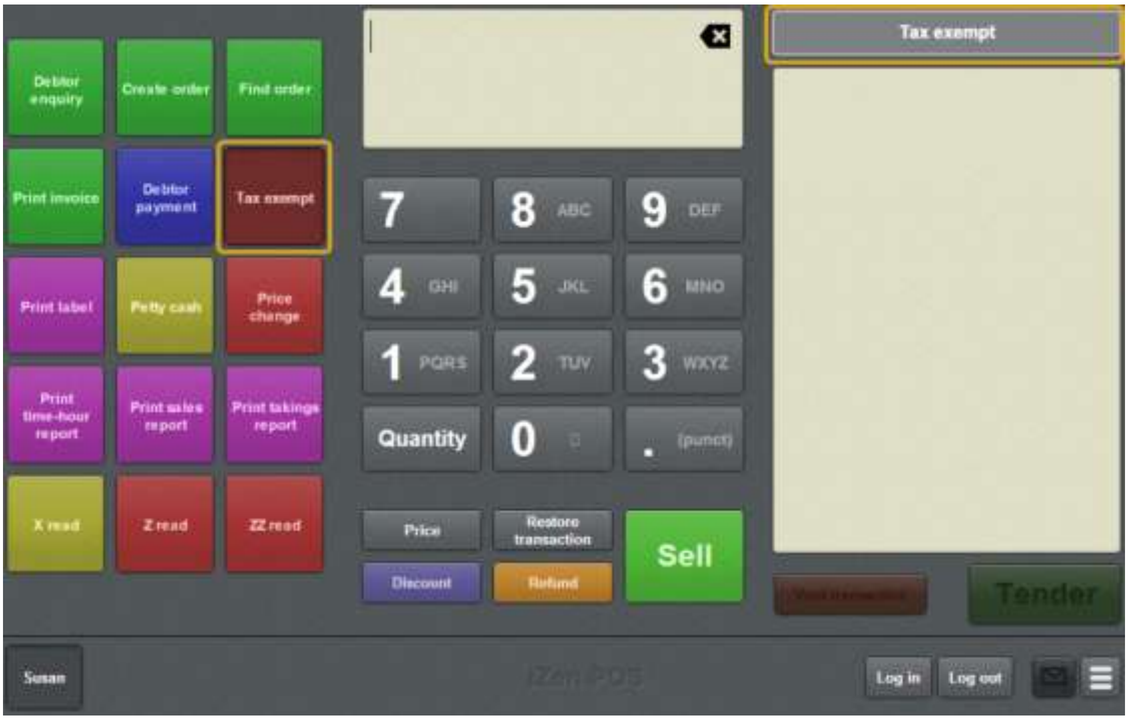
1. Press the **Tax exempt** one-shot button.

> **Note:** Your one-shot button configuration may appear differently to the documentation.

Note: You may require a supervisor's authorisation.

Tip: You can do this at any point before the transaction is finalised.

The Tax exempt one-shot button is toggled on, and the Tax exempt mode is shown above the transaction list.



2. Continue the transaction as normal.

   See *Selling and refunding items* on page 409.

Overriding the price of an item

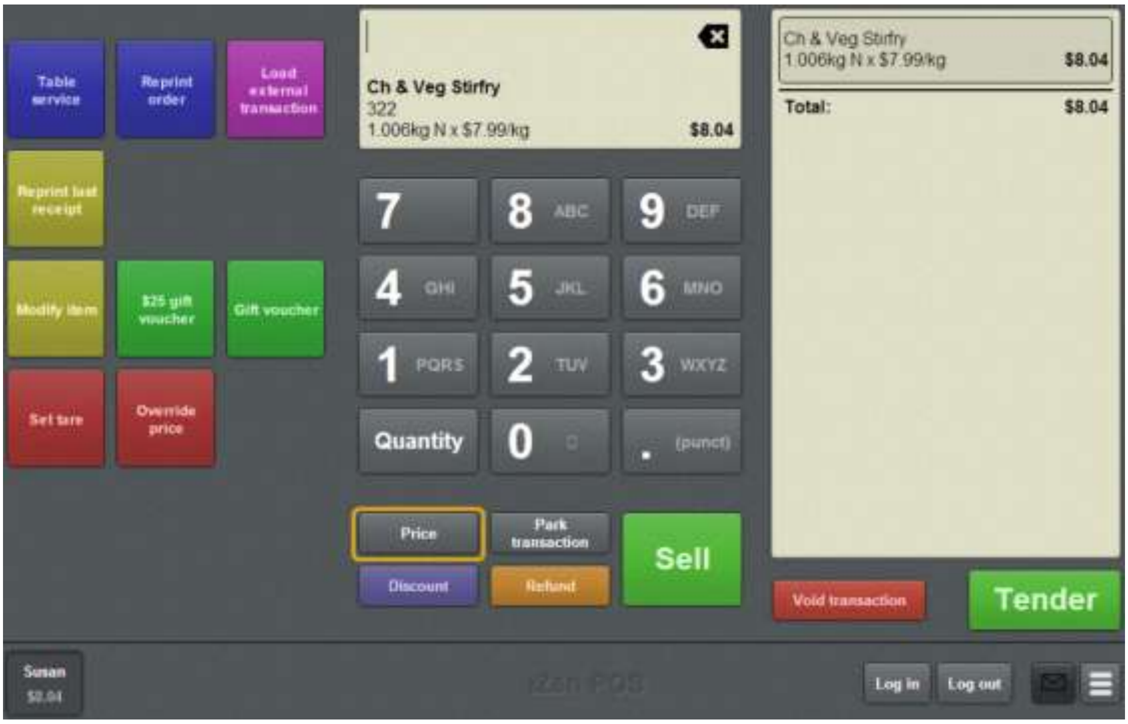
Override the price of an item to change its unit price to a specific amount.

> **Note:** If a promotion or special has been configured on the Portal, it is automatically applied at the Point of Sale.

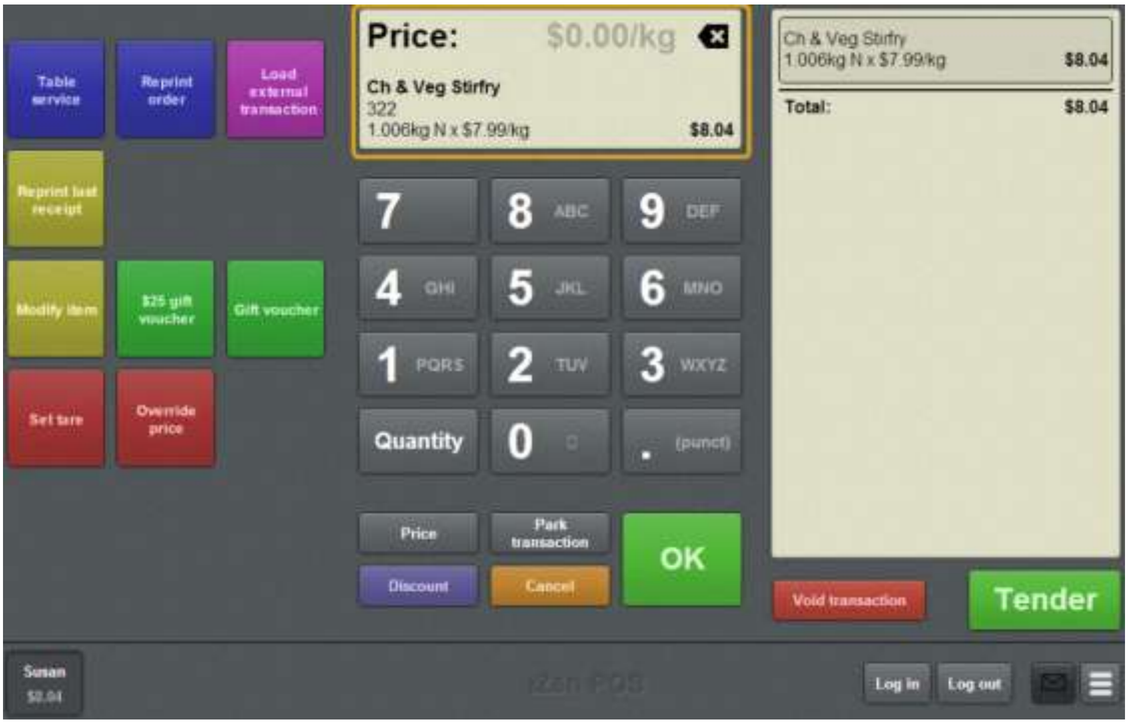
To override an item's price:

1. Either:
    - Search for the item and add it to the transaction.

      See *Finding an item* on page 411.
    - Press the item in the Transaction list if it has already been added to the transaction.
2. Press Price.



3. The Item field displays the item's price.


Price: $0.00/kg

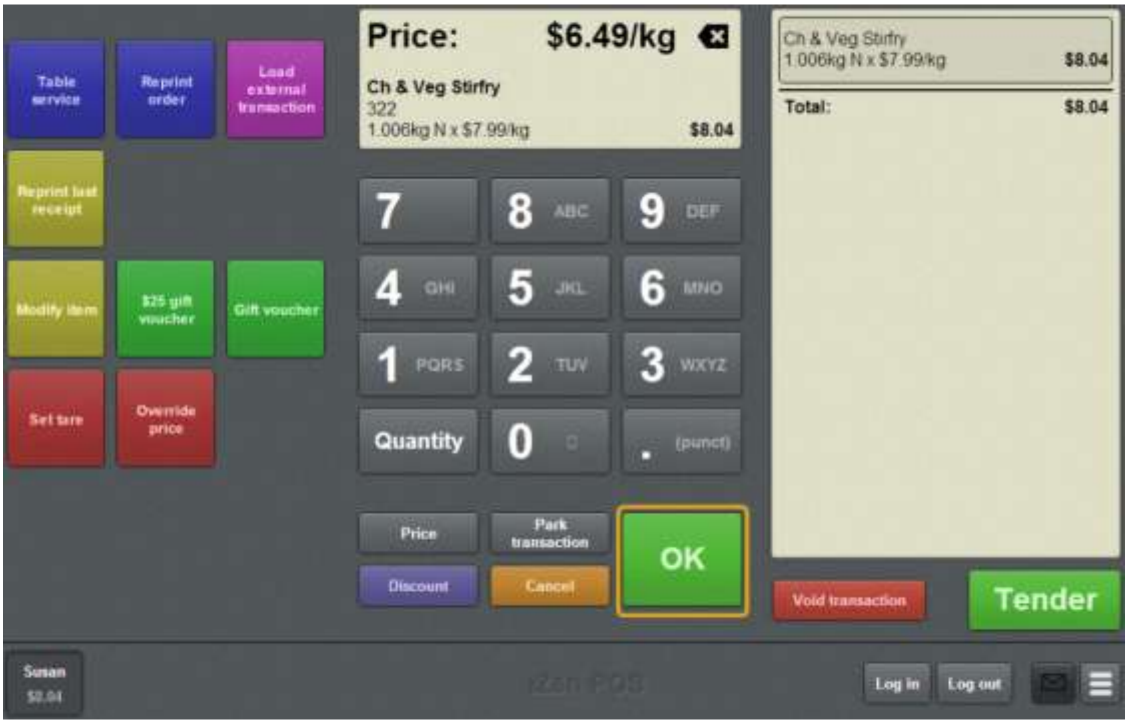
Ch & Veg Stirfry
322
1.006kg N x $7.99/kg $8.04

Ch & Veg Stirfry
1.006kg N x $7.99/kg $8.04

Total: $8.04

4. Type the new unit price of the item.

5. Press OK.


Price: $6.49/kg

Ch & Veg Stirfry
322
1.006kg N x $7.99/kg $8.04

Ch & Veg Stirfry
1.006kg N x $7.99/kg $8.04

Total: $8.04

The unit price is changed. Any discounts are recalculated based on the new price.

> **Note:** Depending on your Point of Sale configuration, you may need a supervisor's authorisation. If you are a supervisor, you may need authorisation from another supervisor.

> **Note:** If you do not want to override the item price, press Cancel.

6. Continue the transaction as normal.

   See *Selling and refunding items* on page 409.

Adding a loyalty card

Add a loyalty card when you want to record the transaction against a customer. For example:

- Record the points a customer has earned for the transaction.
- Grant a staff member a staff discount.

The different loyalty schemes are controlled by your Portal configuration.

> **Note:** You can only add one loyalty card to a transaction. If you add a second card, the first card is removed from the transaction. You can scan a card without adding it to a transaction. See *Viewing a customer's details* on page 514.

When you scan a card, you can also:

- View a customer's details.

  See *Viewing a customer's details* on page 514.
- Edit a customer's details.

  See *Editing loyalty card details* on page 520.
- Create a customer if the loyalty card is a new card.

  See *Creating loyalty cards* on page 512.
- Redeem loyalty points to pay for all or part of the transaction.

  See *Redeeming loyalty points* on page 484.

> **Note:** If the terminal is offline, loyalty card details and card-specific special discounts are not available. Generic loyalty card discounts are still applied.

To scan a loyalty card:

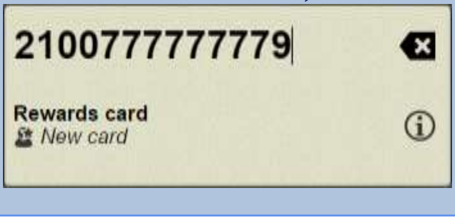
1. Scan or type the loyalty number into the Transaction screen.

   The Item field displays the loyalty card information.

2100777777777

Rewards card
Bob Bird

Note: If the card is new, the Item field displays **New card**.



2100777777779

Rewards card
New card

Printing an item's instructions

Items can have instructions recorded on the Portal that can be printed on the receipt.

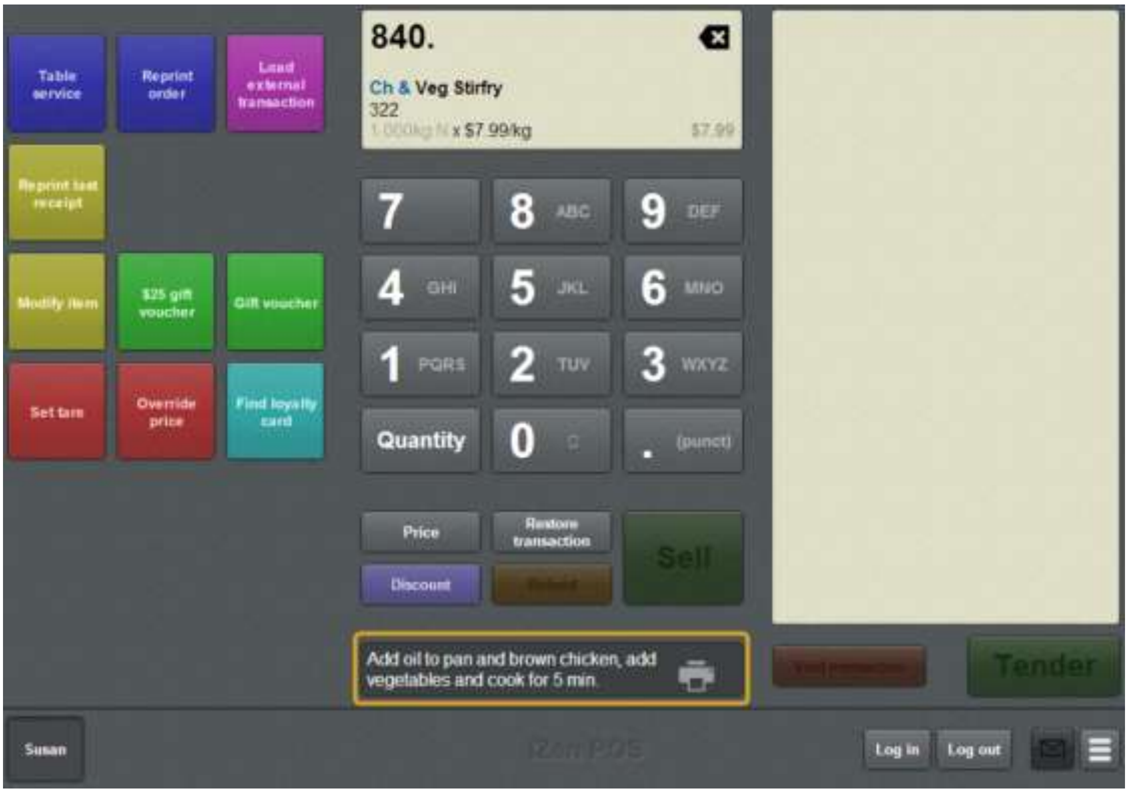
> **Note:** You can only print instructions that have been recorded for the item on the Portal. You cannot add your own instructions via the Point of Sale.

To print instructions for an item:

1. Find the item on the Transaction screen.

   See *Finding an item* on page 411.

   If the item has instructions, they are displayed at the bottom of the Transaction screen.



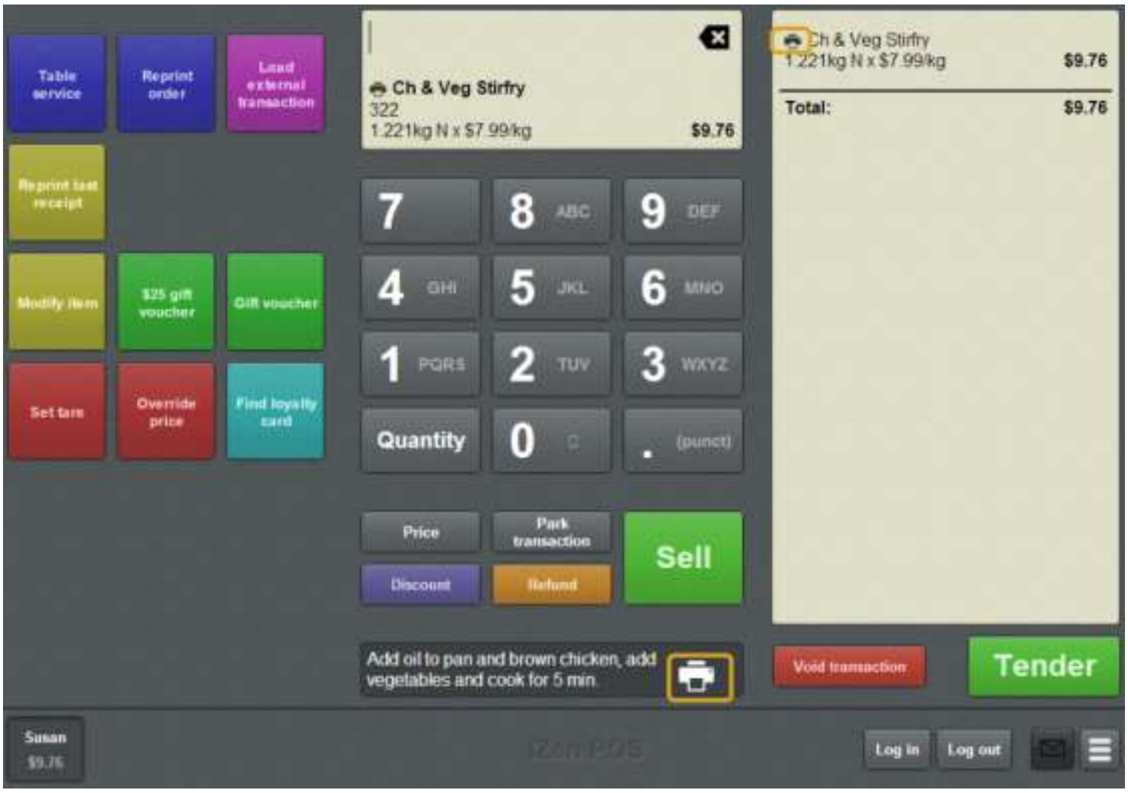
840.

Ch & Veg Stirfry
322
1.000kg N x $7.99/kg $7.99

Add oil to pan and brown chicken, add vegetables and cook for 5 min.

2. Add the item to the Transaction list.
3. To print the instructions on the receipt, press 🖨.

   The print icon is highlighted and displayed on the Transaction list next to the item. The instructions are included on the receipt when the transaction is finalised.



Ch & Veg Stirfry
322
1.221kg N x $7.99/kg $9.76

Ch & Veg Stirfry
1.221kg N x $7.99/kg $9.76

Total: $9.76

Add oil to pan and brown chicken, add vegetables and cook for 5 min.

Susan
$9.76

> **Note:** You can select to print instructions before or after the item is added to the transaction, but the information is only printed if the item is in the finalised transaction. If you remove the item from the transaction list or do not add it, the information is not printed.
>
> **Note:** If you do not want to print the instructions, press the 🖶 button.

The print icon is not highlighted and is removed from the Transaction list.

4. Continue the transaction as normal.

   See *Selling and refunding items* on page 409.

Parking a transaction

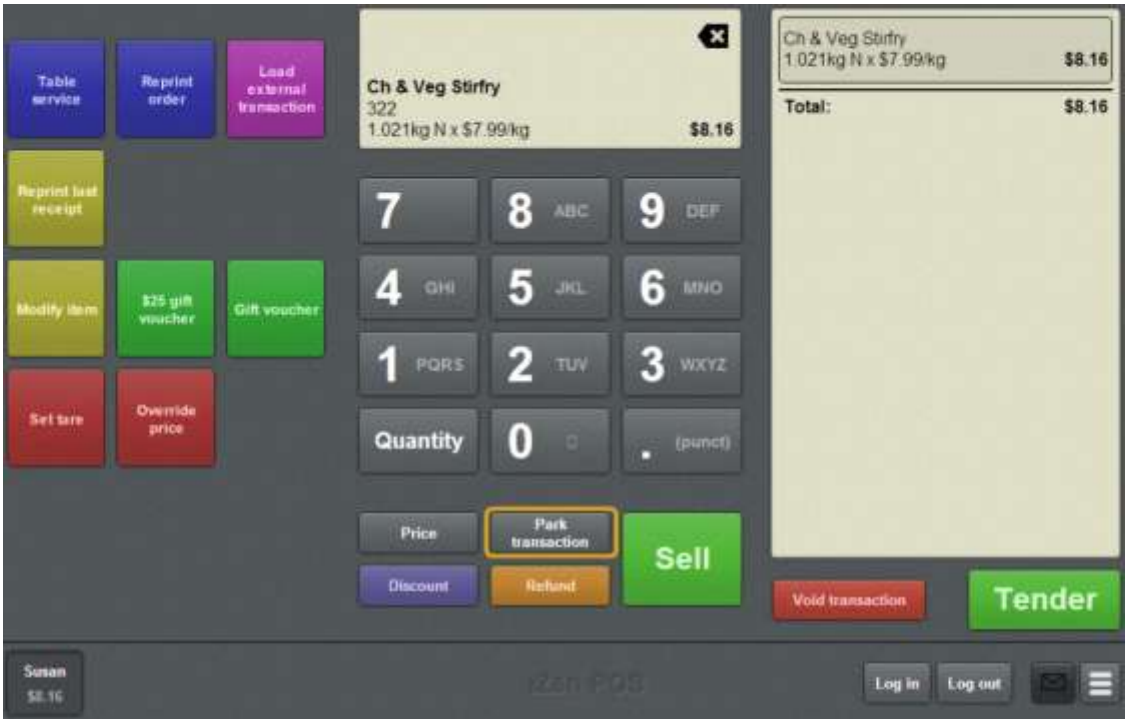
Park a transaction to put it on hold so you can use the terminal to do something else.

You can park and restore the same transaction as many times as you need, and there is no limit to the number of transactions you can have parked at the same time.

> **Note:** A transaction must have items in it to be parked. You cannot park an empty transaction.

To park your current transaction:

1. From the Transaction screen, press Park transaction.



The transaction is parked.

The Transaction screen is ready for the next transaction.

> **Note:** When you want to retrieve this transaction, see *Restoring a parked transaction* on page 449.

Restoring a parked transaction

Restore a parked transaction when you want to edit or complete it.

You can park and restore the same transaction as many times as you need, and there is no limit to the number of transactions you can have parked at the same time.

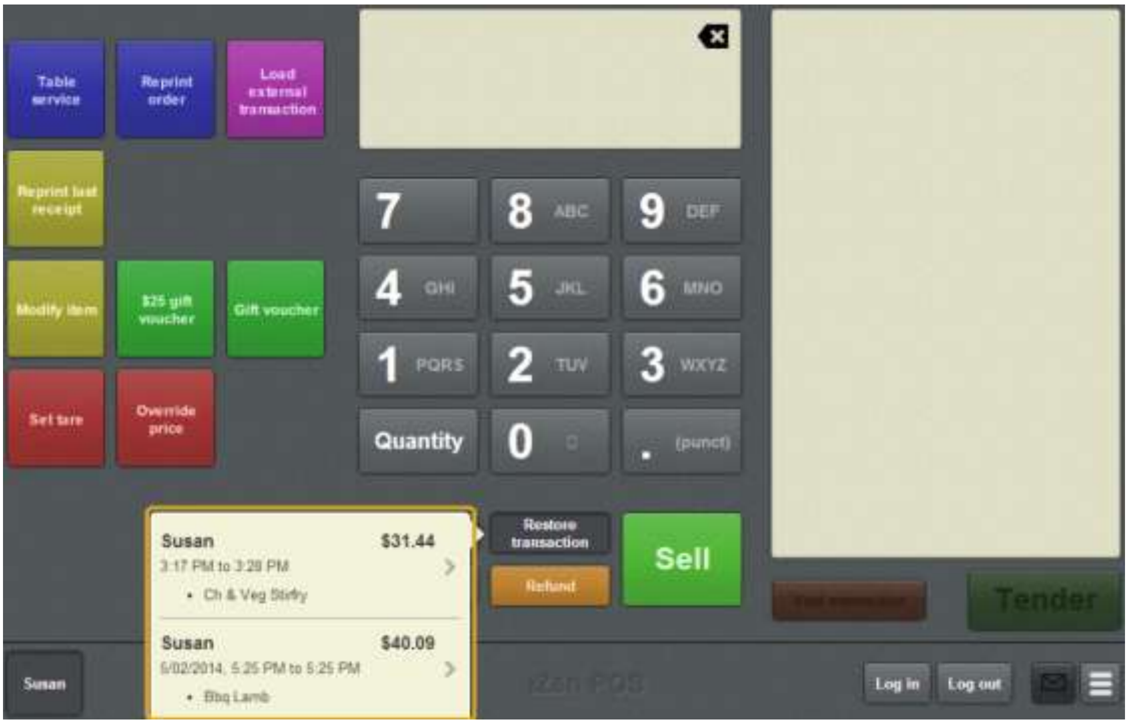
> **Note:** You can only restore a transaction that has been previously parked. See *Parking a transaction* on page 448.

To restore a parked transaction:

1. From the Transaction screen, press Restore transaction.

> **I can't see the button:** This button is only displayed if the current transaction is empty. If your current transaction has items, you must park or void it before you can restore another transaction. See *Parking a transaction* on page 448. Also see *Voiding a transaction* on page 453.

2. The list of your parked transactions is displayed.



Susan $31.44
3:17 PM to 3:28 PM
- Ch & Veg Stirfry

Susan $40.09
6/02/2014, 5:25 PM to 5:25 PM
- Bbq Lamb

3. Press the transaction you want to restore.

   The transaction is restored.

4. Continue the transaction as normal.

   See *Selling and refunding items* on page 409.

Voiding an item

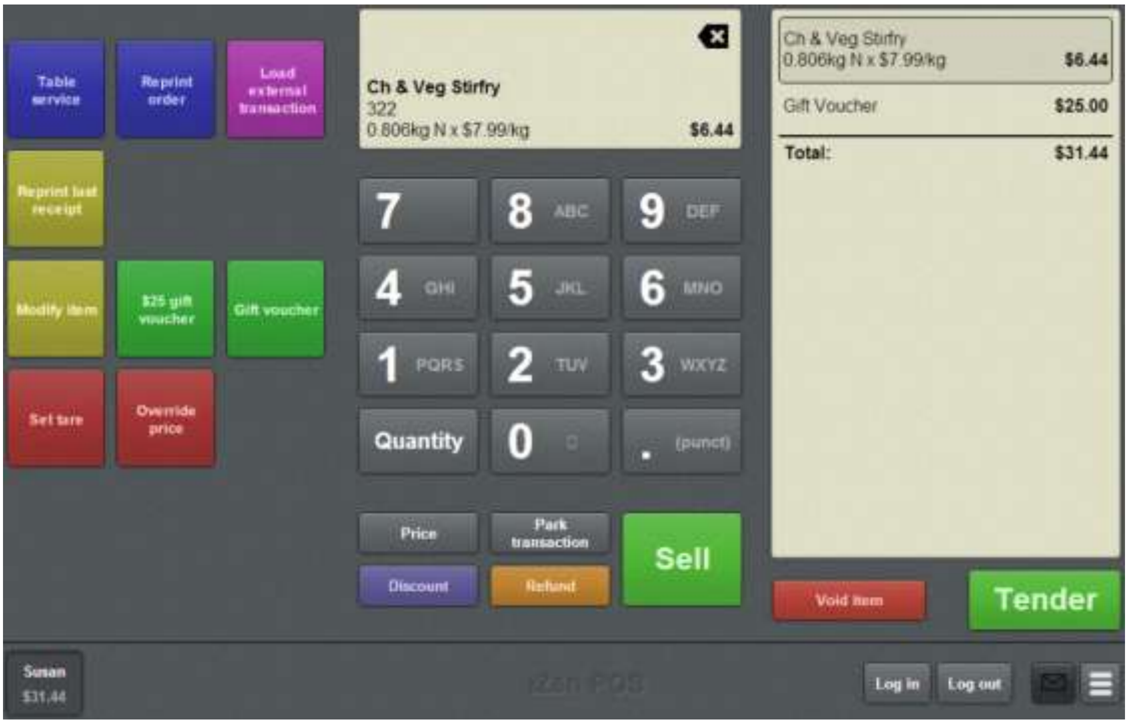
Void an item to remove it from the Transaction list. Not all items can be voided. For example:

- Items imported from external databases such as the Scheduler.
- Some tender types, depending on your Portal configuration.

I can't void an item: Depending on your Portal configuration, some items such as tenders cannot be voided from a transaction. You also cannot void an item if it is the only item in the Transaction list. See *Voiding a transaction* on page 453.

To void an item:

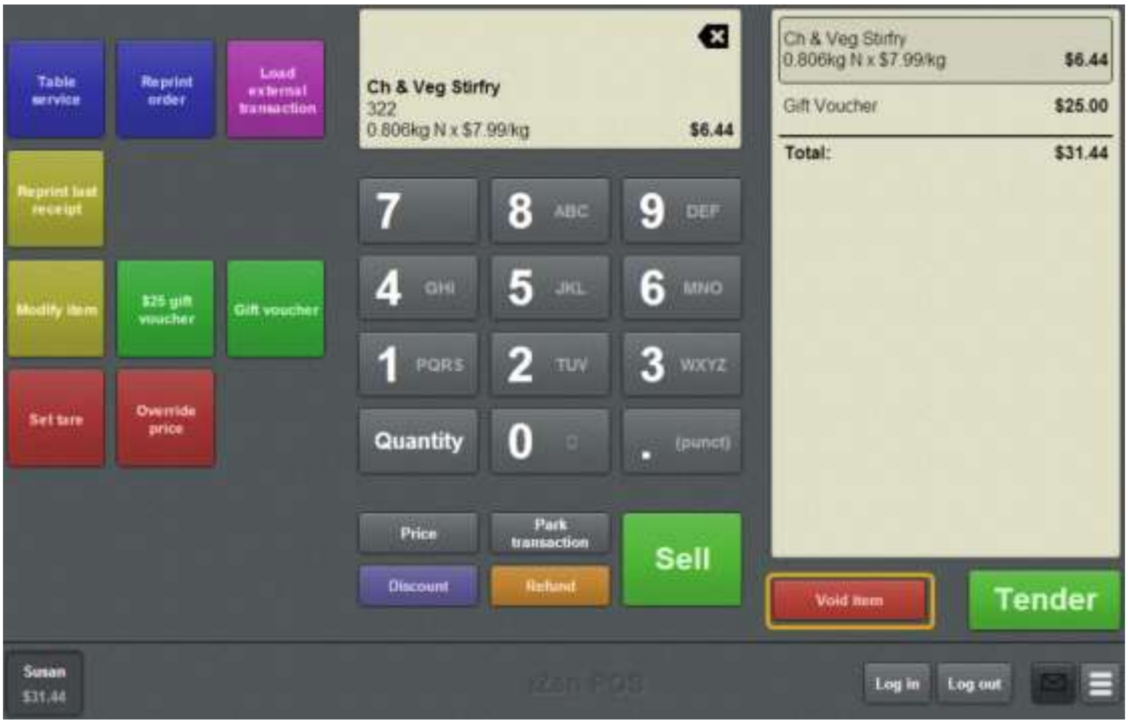
1. On the Transaction screen, press the item in the Transaction list.



Ch & Veg Stirfry
322
0.806kg N x $7.99/kg $6.44

Ch & Veg Stirfry 0.806kg N x $7.99/kg	$6.44
Gift Voucher	$25.00
Total:	$31.44

2. Press Void item.



Ch & Veg Stirfry
322
0.806kg N x $7.99/kg $6.44

Ch & Veg Stirfry 0.806kg N x $7.99/kg	$6.44
Gift Voucher	$25.00
Total:	$31.44

The item is removed from the Transaction list.

> **Note:** Depending on your Point of Sale configuration, you may need a supervisor's authorisation. If you are a supervisor, you may need authorisation from another supervisor.

3. Continue the transaction as normal.

   See *Selling and refunding items* on page 409.

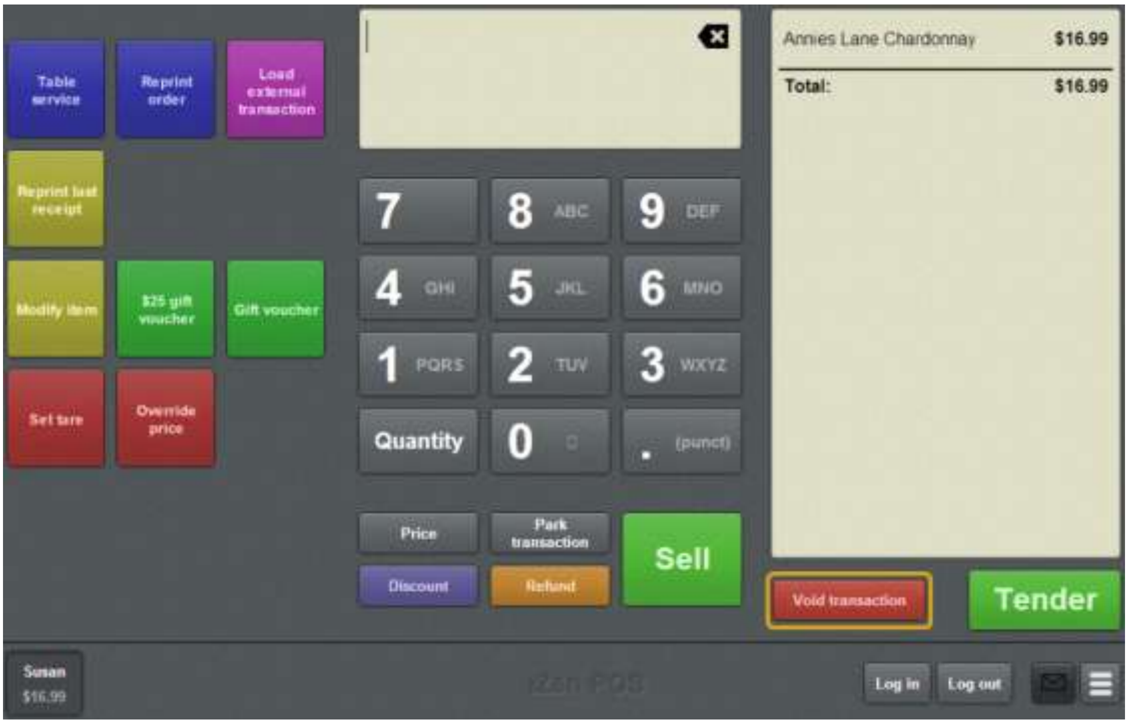
Voiding a transaction

Void a transaction when you want to remove all items and tenders and clear the Transaction screen.

> **I can't void this transaction:** Depending on your Portal configuration, some items cannot be voided. For example, card tender types may not be able to be voided once they have been processed. Transactions cannot be voided if they contain an item that can't be voided, or if they have been finalised. If you want to undo a transaction that has been finalised or contains items that can't be voided, you must create a new transaction, refund all the items and add the same tender types as you used in the original transaction. See *Refunding an item* on page 424.

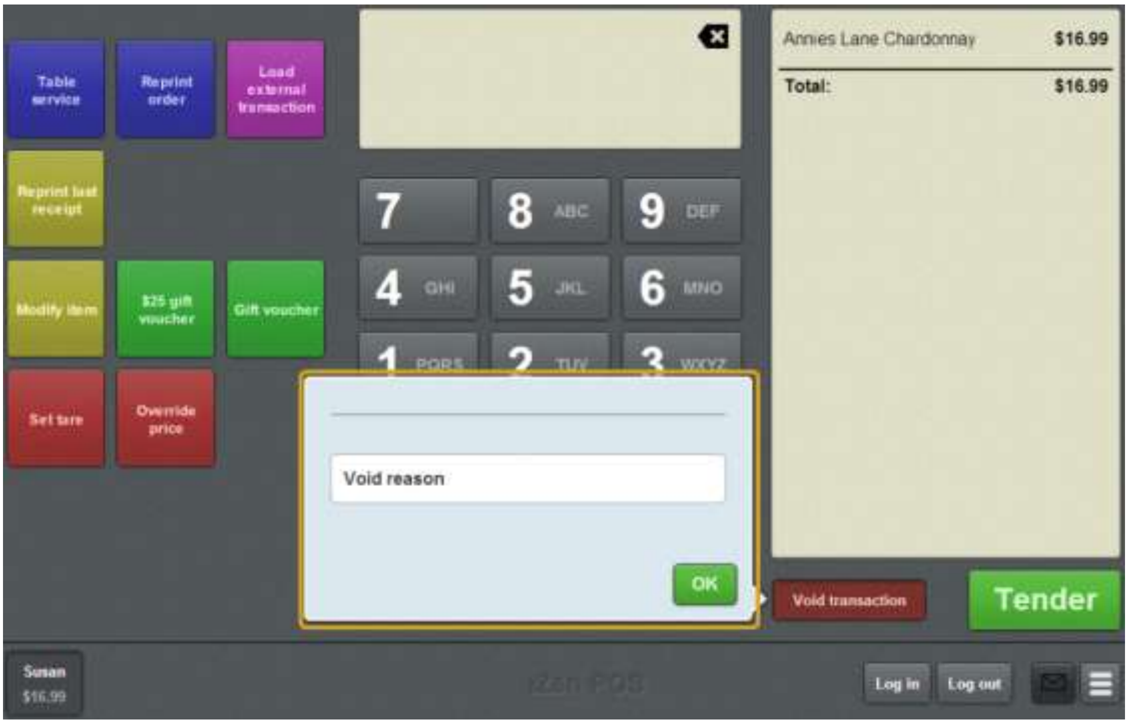
To void a transaction:

1. On the Transaction screen, press **Void transaction**.



> **Note:** If **Void item** is displayed instead, you currently have an item selected. Press an empty area of the Transaction screen to deselect the item.

2. If your Point of Sale is configured to require a reason for voiding a transaction, the Void reason screen is displayed.



Annes Lane Chardonnay $16.99

Total: $16.99

3. Type in a reason for voiding the transaction.

   The transaction is voided.

   The Transaction screen is ready for the next transaction.

> **Note:** Depending on your Point of Sale configuration, you may need a supervisor's authorisation. If you are a supervisor, you may need authorisation from another supervisor.

Transaction screen

Use the Transaction screen to:

- Log in, log out and swap operators.

  See *Logging out of the terminal* on page 346.

  Also see *Swapping operators* on page 350.

- View messages from the Portal.

  See *Reading user messages* on page 380.

- Open the Terminal setup screen.

  See *Terminal setup screen - Registration tab* on page 44.

- Modify one-shot buttons.

  See *Editing one-shot buttons* on page 324.

- Manage the cash drawer with no-sales, handovers and advances.

  See *Recording a no-sale* on page 354.

  Also see *Recording a handover* on page 357.

  Also see *Recording an advance* on page 355.

- Park and retrieve transactions.

  See *Parking a transaction* on page 448.

  Also see *Restoring a parked transaction* on page 449.

- Add items or loyalty cards to transactions.

  See *Selling an item by unit* on page 414.

  Also see *Selling an item by weight* on page 416.

  Also see *Adding a loyalty card* on page 444.

- Apply discounts or price overrides to items.

  See *Applying a discount to an item* on page 434.

  Also see *Overriding the price of an item* on page 441

- Modify the quantity or details of items in a transaction.

  See *Changing an item's quantity* on page 429.

  Also see *Adding options to items* on page 432.

  Also see *Taring the scale* on page 418.

- Void items and transactions.

  See *Voiding an item* on page 451.

  Also see *Voiding a transaction* on page 453.
- Import transactions from another database, such as the Scheduler.

  See *Paying for external transactions* on page 605.
- Manage table service.

  See *Waiting tables* on page 609

Opening the Transaction screen

To open the Transaction screen:

1. Log in to the Point of Sale. See *Logging in to the terminal* on page 348.

   The Transaction screen is displayed.

> **Note:** Your Transaction screen may look different if your Point of Sale is in Scales certification compliance mode or you have enabled the large display. See *Scales certification compliance mode* on page 644.

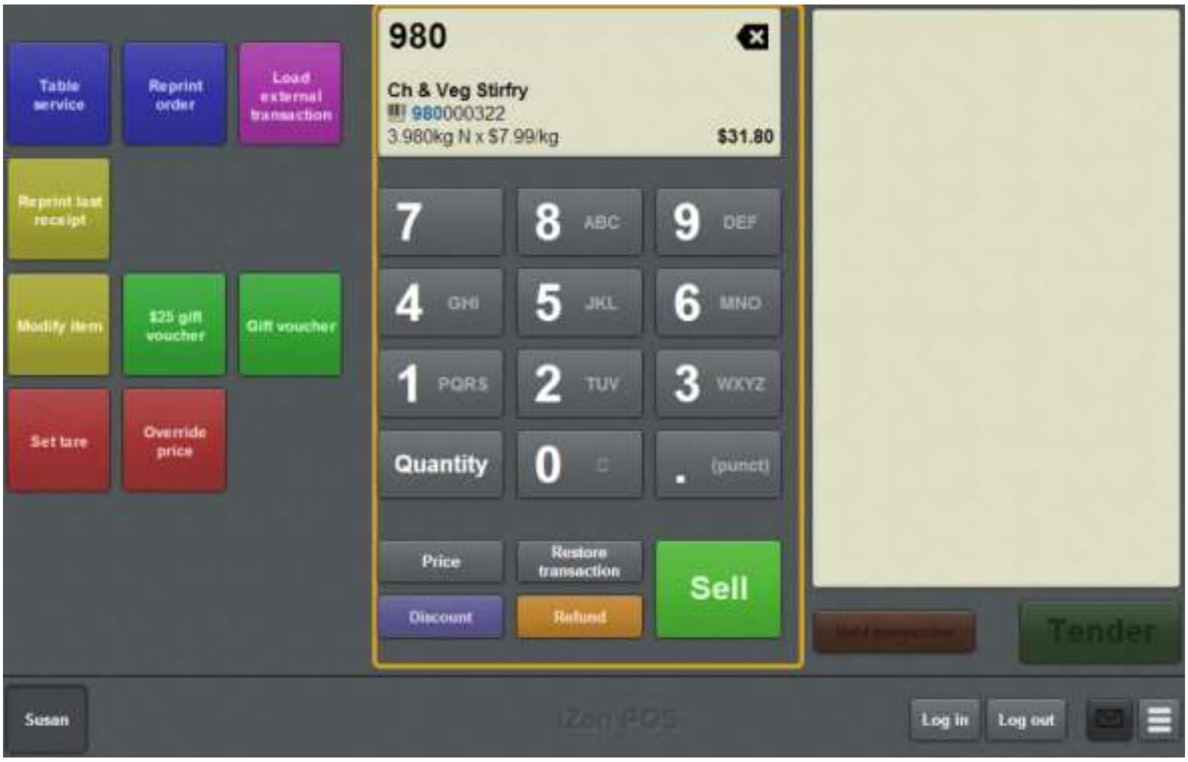
Transaction screen key fields and buttons

One-shot buttons area

This area can be configured to provide additional functions. See *Setting up one-shot buttons* on page 101. For example, one-shot buttons can allow you to:

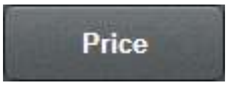
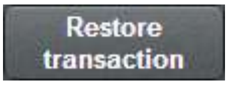
- Wait tables. See *Waiting tables* on page 609.
- Retrieve scheduled appointments for payment. See *Paying for external transactions* on page 605.
- Create gift vouchers. See *Creating gift vouchers* on page 421.
- Add options to items. See *Adding options to items* on page 432.

Item area



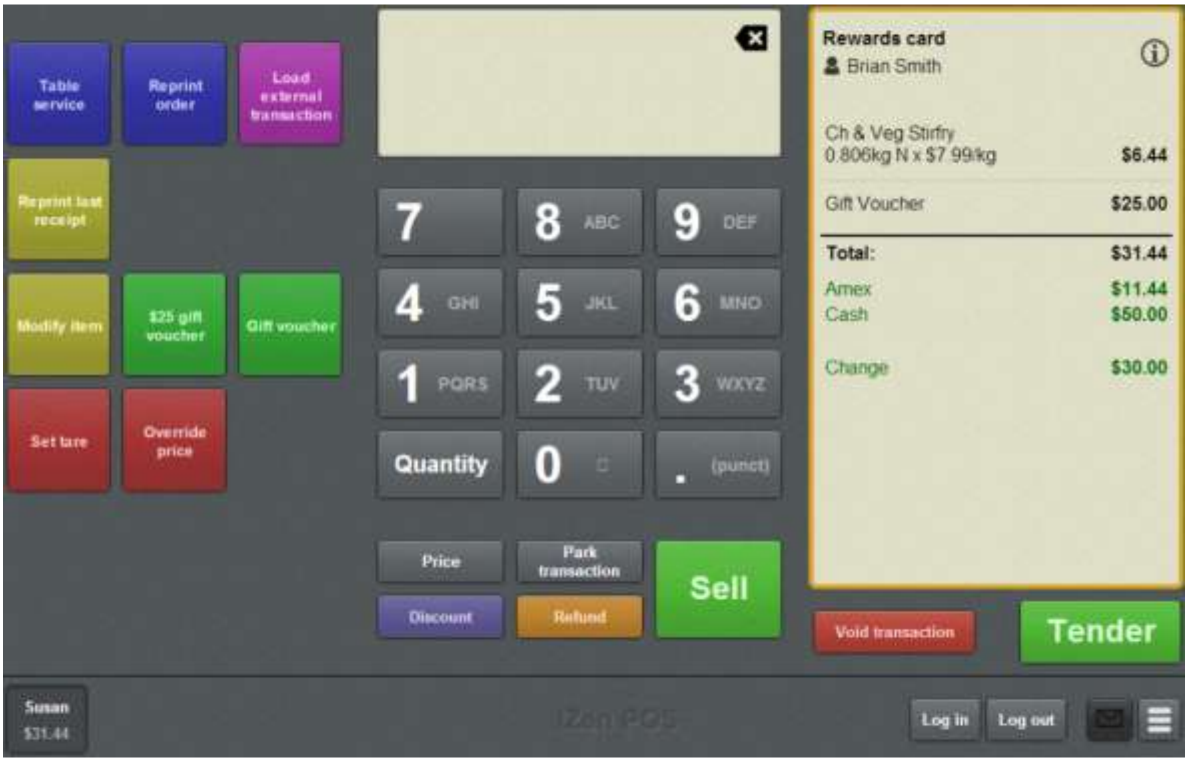
This area allows you to:

- Search for and select items and loyalty cards to add to the transaction.
- Apply discounts and price overrides to the selected item.
- Specify a discount amount.
- Select the quantity of items in a transaction.
- Park and restore transactions.
- Convert item sales to refunds and item refunds to sales.

Field	Description
 980 Ch & Veg Stirfry 980000322 3.980kg N x $7.99/kg $31.80	The Item field displays: ▪ The price, barcode and description of the selected item, or the first result in an item search. ▪ Any discounts or price overrides applied to the selected item. ▪ The number of units of the selected item currently in the transaction. ▪ The loyalty number and name of a selected loyalty card.
	Use the keypad to: ▪ Search for items. See *Finding an item* on page 411. ▪ Search for a loyalty card. See *Adding a loyalty card* on page 444. ▪ Type in a price or quantity override.
	Press to change the number of units of an item included in the transaction. See *Changing an item's quantity* on page 429.
	Press to modify the unit price of the selected item. See *Overriding the price of an item* on page 441.
	Press to apply a discount to the selected item. See *Applying a discount to an item* on page 434.
	Press to park the current transaction. See *Parking a transaction* on page 448.
	Press to restore a parked transaction. See *Restoring a parked transaction* on page 449.
	Press to send the selected table order to the kitchen. See *Sending orders to the kitchen* on page 620.

Field	Description
Refund	Press to refund a unit of the selected item in the transaction. See *Refunding an item* on page 424.
Sell	Press to add a unit of the selected item to the transaction. See *Selling an item by unit* on page 414.
OK	Press to confirm a change made to the selected item.
Cancel	Press to cancel a change made to the selected item.

Transaction list area



Rewards card
Brian Smith

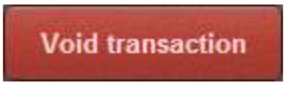
Ch & Veg Stirfry 0.806kg N x $7.99/kg	$6.44
Gift Voucher	$25.00
Total:	**$31.44**
Amex	$11.44
Cash	$50.00
Change	$30.00

This area lists all the transaction information, including

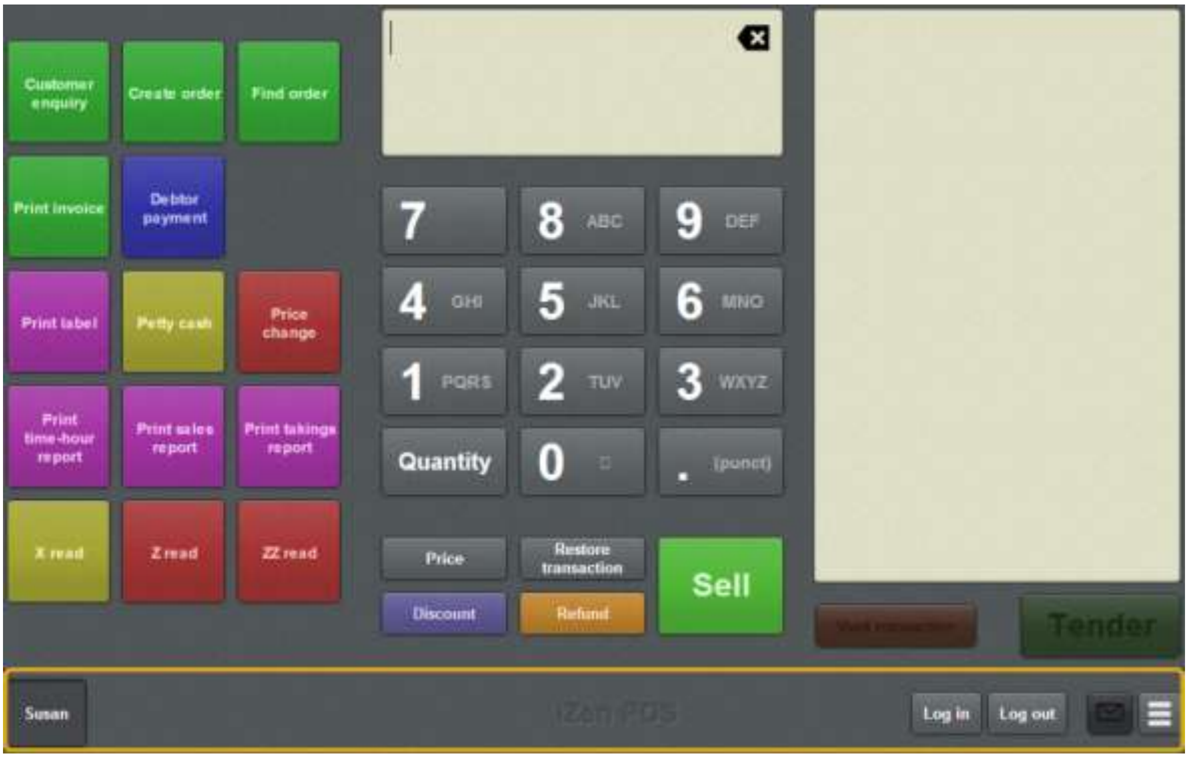
- Items being purchased or returned, their quantities and prices.
- Any price overrides or discounts applied to items or the transaction.
- The amounts and types of tenders used to pay for the transaction.
- Any gift vouchers created during the transaction.
- The loyalty number linked to the transaction, if applicable.

This area also allows you to:

- Void items.
- Void the transaction.
- Open the Tender screen to finalise the transaction.

Field	Description
 **Rewards card** Brian Smith Skinless Chicken Breast 16.358kg N x $5.99/kg **$97.98** **Total:** **$97.98** Rewards card redemption (50 pts) **$10.00** Credit Card **$50.00** Gift Voucher **$20.00** CASH **$20.00** Rounding **$0.02** Change **$2.00**	The Transaction list lists all the transaction information, including: ▪ The loyalty card, if one has been added. ▪ All items included in the transaction. ▪ The number of units of each item included in the transaction. ▪ Any discounts or price overrides applied. ▪ All tenders for the transaction.
	Remove the selected item from the Transaction list. See *Voiding an item* on page 451.
	Void the current transaction. See *Voiding a transaction* on page 453.
	Tender the current transaction. See *Finalising a transaction* on page 466.

Menu area



This area allows you to log in, log out, switch between operators and open the Point of Sale menu.

Field	Description
Susan	Select a logged-in operator for the terminal.
Log in	Press to log another operator into the terminal. See *Logging in to the terminal* on page 348. **Note:** This button is only displayed if the Point of Sale is configured to allow multiple operators to log in at the same time. See *Terminal setup screen - Security tab* on page 50.
Log out	Press to log the current operator out of the terminal. See *Logging out of the terminal* on page 346. **Note:** This button is disabled when a transaction is active unless the Point of Sale is configured to allow logging off during active transactions. See *Terminal setup screen - Security tab* on page 50.
✉	Open the Portal messages screen. See *Reading user messages* on page 380.
☰	Open the Point of Sale menu.

Tendering transactions

Add tenders to transactions to record payment types and amounts and finalise the transaction.

Key concepts

Please see the *Glossary* on page 649 for information relating to the following terms:

Balanced transaction
Centre voucher
Discount
Finalise
Gift voucher
Loyalty
Loyalty card
Overtender
Point of Sale
Quick amount buttons
Tender
Tender type
Transaction
Transaction list

Also see *Tender screen* on page 502.

What you can do:

The following topics explain the tasks related to tendering transactions:

- *Finalising a transaction* on page 466.
- *Adding a tender* on page 469.
- *Tendering cash* on page 471.
- *Tendering EFTPOS* on page 473.
- *Tendering debtor payments* on page 476.
- *Tendering gift vouchers* on page 478.
- *Redeeming loyalty points* on page 484.
- *Splitting a tender* on page 482.
- *Discounting a transaction* on page 487.
- *Voiding a tender* on page 490.
- *Changing a tender* on page 493.
- *Collecting customer information* on page 494.
- *Emailing customers a receipt* on page 496.
- *Preventing a receipt being emailed to a customer* on page 498.
- *Recording a tax exempt ID during tender* on page 500.

Finalising a transaction

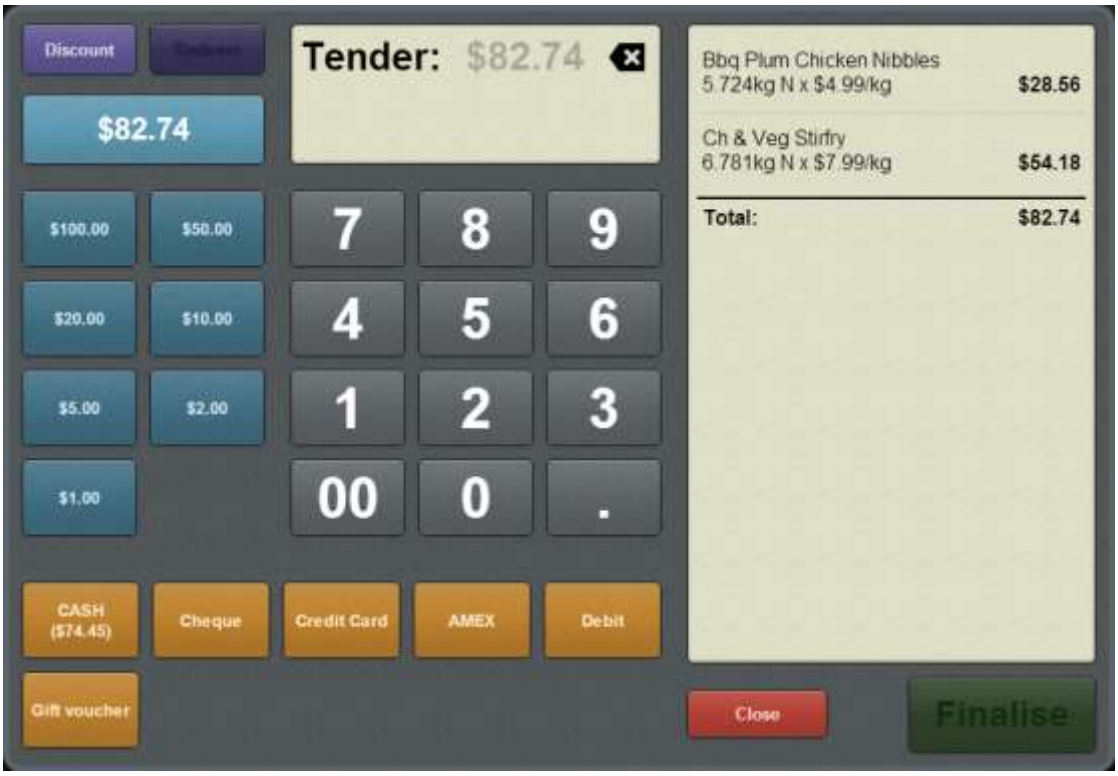
Finalise a transaction when you have finished adding items and are ready to process payments.

I can't add tenders to a transaction: You cannot add tenders to an empty transaction or a transaction that has pending items.

To finalise a transaction:

1. From the Transaction screen press Tender.

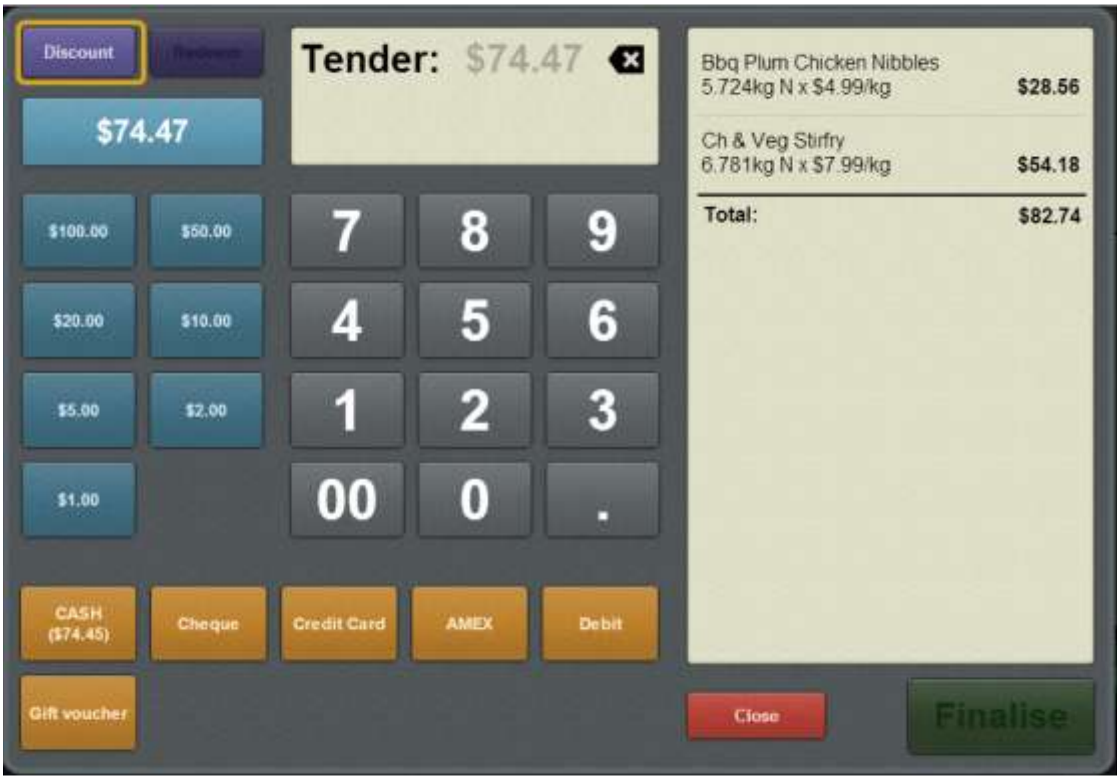
   The Tender screen is displayed.



Bbq Plum Chicken Nibbles 5.724kg N x $4.99/kg	$28.56
Ch & Veg Stirfry 6.781kg N x $7.99/kg	$54.18
Total:	$82.74

2. Apply any discounts to the transaction using the Discount button.

   See *Discounting a transaction* on page 487.

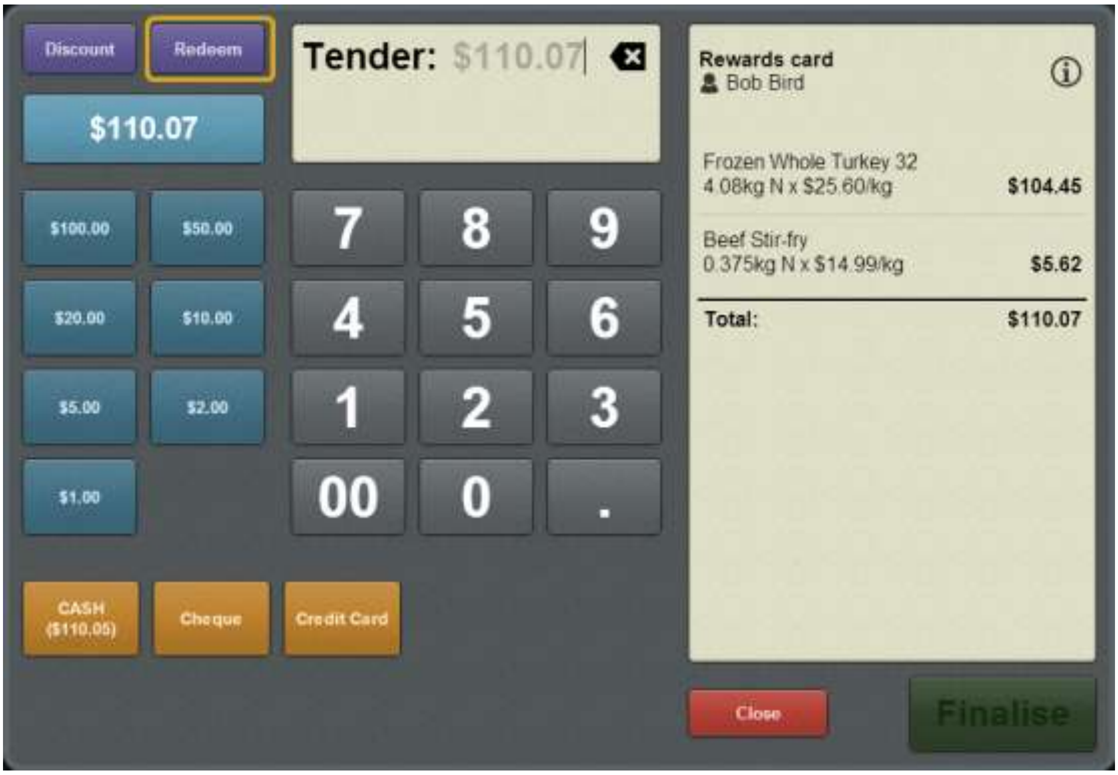


Tender: $74.47

Bbq Plum Chicken Nibbles 5.724kg N x $4.99/kg	$28.56
Ch & Veg Stirfry 6.781kg N x $7.99/kg	$54.18
Total:	$82.74

3. Redeem any loyalty points the customer wants to redeem using the Redeem button.

   See *Redeeming loyalty points* on page 484.



Tender: $110.07

Rewards card
Bob Bird

Frozen Whole Turkey 32 4.08kg N x $25.60/kg	$104.45
Beef Stir-fry 0.375kg N x $14.99/kg	$5.62
Total:	$110.07

4. If a new loyalty card has been added to the transaction, make sure the mandatory details are complete.

> **Tip:** If the loyalty card is incomplete, the ⓘ icon flashes. You can locate missing mandatory fields by looking for the red tab labels. The missing fields are shaded red.

5. If the customer is paying with:
    - Cash, see *Tendering cash* on page 471.
    - Credit or debit card, see *Tendering EFTPOS* on page 473.
    - A gift voucher, see *Tendering gift vouchers* on page 478.
    - Their debtor account, see *Tendering debtor payments* on page 476.
    - More than one type of payment method, see *Splitting a tender* on page 482.

    Also see *Adding a tender* on page 469.

    > ? **I can't finalise a transaction:** You cannot finalise a transaction until it balances. That is, the amount tendered is equal to or greater than the total transaction amount.

6. Press Finalise.

    The transaction is finalised and completed.

    The Tender screen is closed.

    The Transaction screen is ready for the next transaction.

Adding a tender

A tender is a payment, either made by the customer, or provided to the customer as a refund. Add a tender to a transaction to record:

- How much a customer paid in a transaction and what payment type they used.
- How much a customer was refunded and what payment type was used for the refund.

You can add multiple tenders to a transaction until the full transaction amount has been tendered. You can then finalise the transaction to complete it.

I can't add tenders to a transaction: You can only add tenders to a transaction that has items.

The Point of Sale responds differently depending on the type of payment you are tendering and your Portal configuration for that tender type:

- *Tendering cash* on page 471.
- *Tendering EFTPOS* on page 473.
- *Tendering gift vouchers* on page 478.
- *Tendering debtor payments* on page 476.

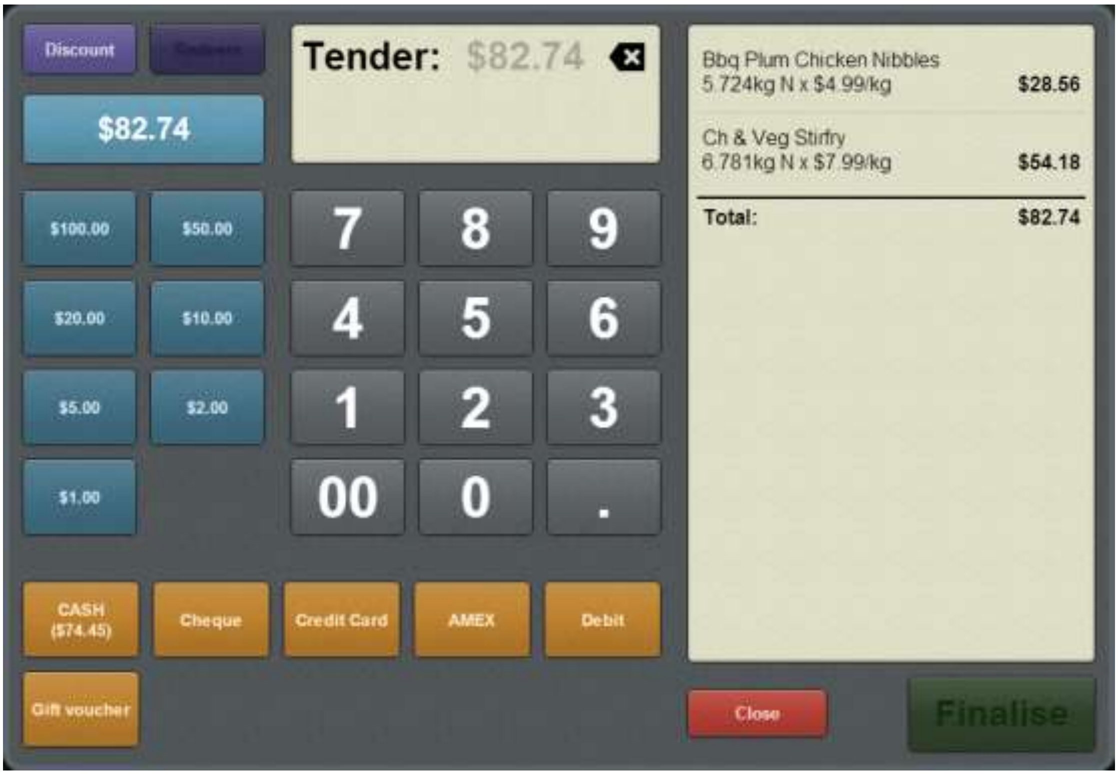
If you want to add more than one type of payment to a transaction, see *Splitting a tender* on page 482.

To add a tender to a transaction:

1. On the Transaction screen, press 

.

   The Tender screen is displayed.



Tender: $82.74

Bbq Plum Chicken Nibbles
5.724kg N x $4.99/kg $28.56

Ch & Veg Stirfry
6.781kg N x $7.99/kg $54.18

Total: $82.74

See *Tender screen* on page 502.

2. Select the type of payment from the Tender type buttons.

> **I can't add this tender type:** A tender type is disabled if the payment amount you have selected is not permitted for that type. For example, credit cards and debit cards cannot pay more than the amount of the sale. If a sale total is $20 and you type $25, the credit card and debit card tender types are disabled. Once the full amount of the sale has been tendered, all tender types are disabled.

The tender is added to the transaction.

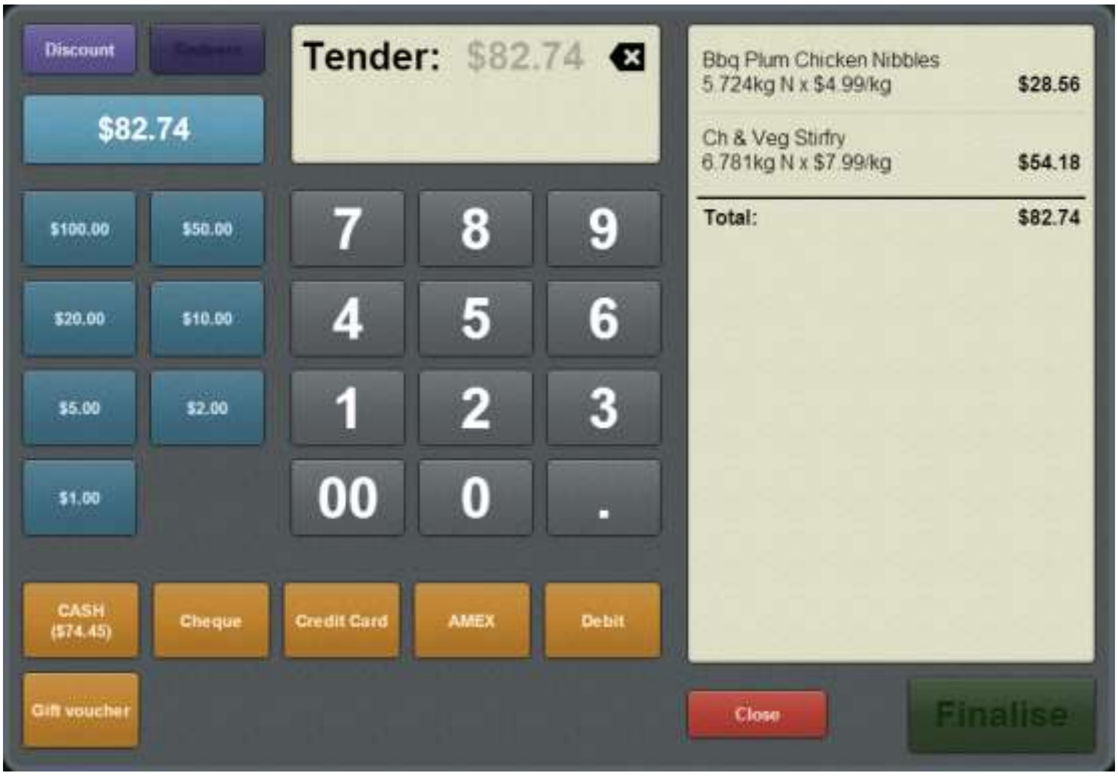
Tendering cash

Tender a cash payment when the customer wants to add a payment with cash.

To tender a cash payment:

1. On the Transaction screen, press **Tender**.

   The Tender screen is displayed.

   Bbq Plum Chicken Nibbles
   5.724kg N x $4.99/kg $28.56

   Ch & Veg Stirfry
   6.781kg N x $7.99/kg $54.18

   Total: $82.74

   See *Tender screen* on page 502.

2. Type the exact amount the customer has paid by:
   - typing the amount of the payment using the keypad
   - pressing the Quick amount buttons on the left
   - pressing the Exact amount button.

   > **Tip:** You can combine these options. For example, you can press the Exact amount button and then add more using the cash amounts or keypad.

3. Press the **Cash** tender type button.

   The amount is tendered.

   Any change owed to the customer is displayed on the Transaction list and the Transaction screen.

4. If you need to add another tender, see *Splitting a tender* on page 482.
5. When the amount has been paid in full, press Finalise.

   The transaction is finalised and the Tender screen is closed.

   The Transaction screen is ready for the next transaction.

Tendering EFTPOS

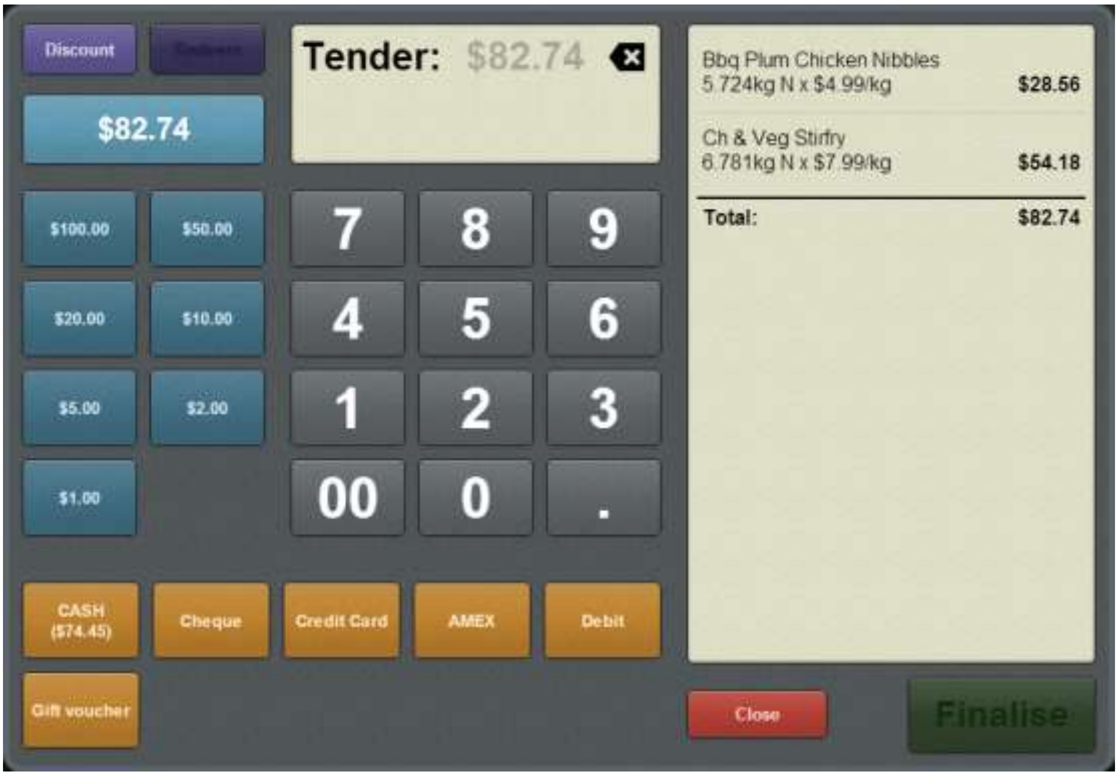
Tender an EFTPOS payment when the customer wants to use a debit or credit card.

> **Note:** Depending on your Portal configuration, some credit cards may incur a surcharge. This surcharge is displayed on the Tender type button, unless you have typed in a specific amount that is less than the remaining balance. Surcharges are listed separately in the Transaction list.

To tender an EFTPOS payment:

1. On the Transaction screen, press Tender.

   The Tender screen is displayed.



Tender: $82.74

Bbq Plum Chicken Nibbles
5.724kg N x $4.99/kg $28.56

Ch & Veg Stirfry
6.781kg N x $7.99/kg $54.18

Total: $82.74

   See *Tender screen* on page 502.

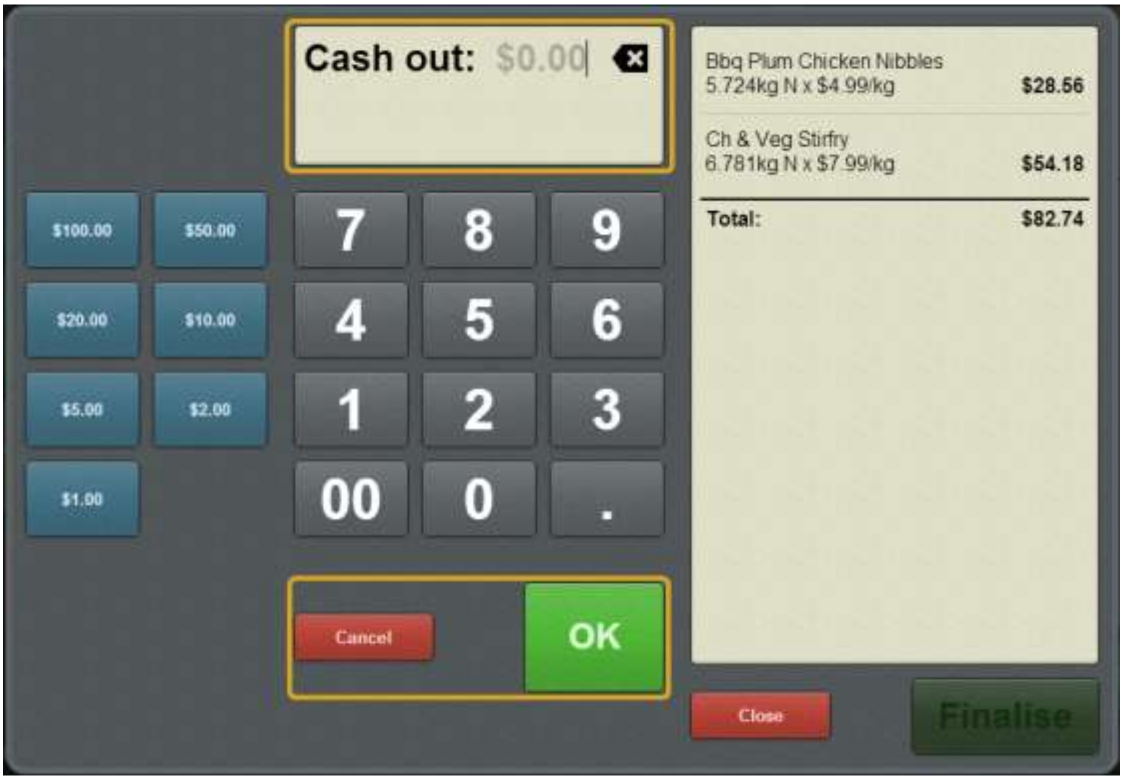
2. If the customer is paying the exact amount, press the tender type button that corresponds to the payment type.
3. If the customer is not paying the exact amount with this tender:
    1. Select the tender amount by either:
        - typing the amount of the payment using the keypad
        - pressing the Quick amount buttons on the left.

> **Tip:** You can combine these options. For example, you can press the Exact amount button and then add more using the cash amounts or keypad.

2. Press the Tender type button that corresponds to the payment type.

> **Note:** Your Portal configuration may not allow customers to pay more than the amount owed via EFTPOS.

Depending on your Portal configuration, the Tender screen may prompt for a cash-out amount.



Cash out: $0.00

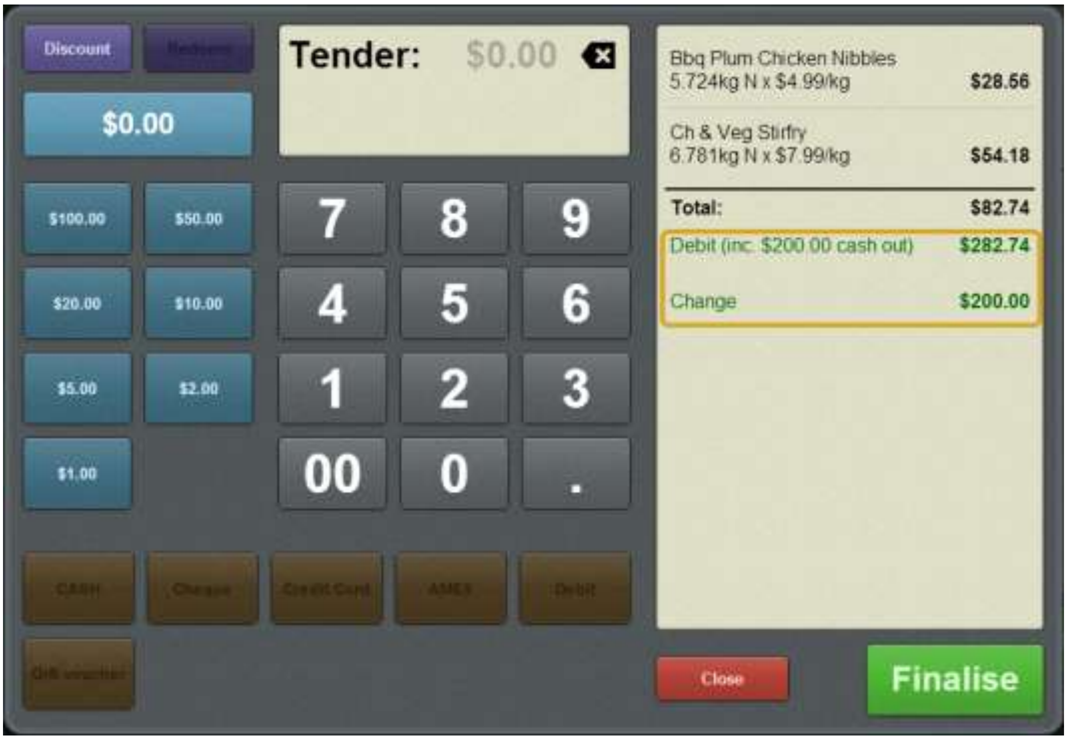
Bbq Plum Chicken Nibbles 5.724kg N x $4.99/kg	$28.56
Ch & Veg Stirfry 6.781kg N x $7.99/kg	$54.18
Total:	$82.74

4. If a cash-out amount is prompted:
    1. Type the amount of cash the customer wants to withdraw.

    > **Tip:** Leave the cash-out amount blank if the customer does not want to withdraw cash.

    2. Press OK.

    The cash-out and tender are added to the transaction.



Bbq Plum Chicken Nibbles 5.724kg N x $4.99/kg	$28.56
Ch & Veg Stirfry 6.781kg N x $7.99/kg	$54.18
Total:	**$82.74**
Debit (inc. $200.00 cash out)	$282.74
Change	$200.00

5. If you need to add another tender, see *Splitting a tender* on page 482.
6. When the amount has been paid in full, press Finalise.

   The transaction is finalised and the Tender screen is closed.

   The Transaction screen is ready for the next transaction.

Tendering debtor payments

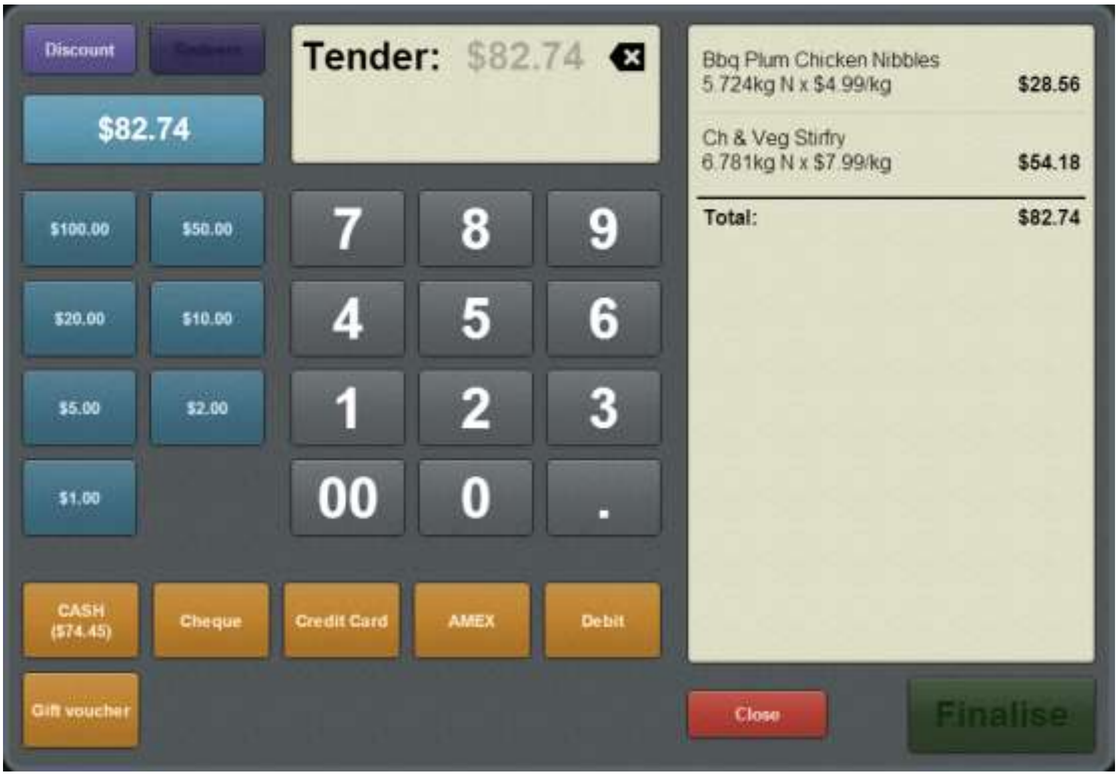
Tender a debtor payment if a customer wants to put part or all of the transaction on their debtor account to be paid at a later date.

> **Note:** The customer's available credit balance must be more than the amount they want to add to the account. To check a customer's balance, see *Viewing a debtor's details* on page 588.

To tender a debtor payment:

1. On the Transaction screen, press **Tender**.

   The Tender screen is displayed.



Bbq Plum Chicken Nibbles 5.724kg N x $4.99/kg	$28.56
Ch & Veg Stirfry 6.781kg N x $7.99/kg	$54.18
Total:	$82.74

   See *Tender screen* on page 502.

2. If the customer is paying the exact amount, press the tender type button that corresponds to the payment type.
3. If the customer is not paying the exact amount with this tender:
    1. Select the tender amount by either:
        - typing the amount of the payment using the keypad
        - pressing the Quick amount buttons on the left.

Tip: You can combine these options. For example, you can press the Exact amount button and then add more using the cash amounts or keypad.

2. Press the Tender type button that corresponds to the payment type.

Note: Your Portal configuration may not allow customers to pay more than the amount owed via debtor payment.

4. If you need to add another tender, see *Splitting a tender* on page 482.
5. When the amount has been paid in full, press Finalise.

   The transaction is finalised and the Tender screen is closed.

   The Transaction screen is ready for the next transaction.

Tendering gift vouchers

Gift vouchers are individual vouchers identified by serial numbers specific to your organisation. They are **not**:

- Centre vouchers, which are supplied by another entity such as a shopping centre or conglomerate.
- External gift cards, which are used with an EFTPOS machine.
- Discount codes which provide a discount off an item or sale.

Tender a gift voucher if the customer gives you a gift voucher as full or partial payment for a transaction. If a customer is trying to purchase a gift voucher, see *Creating gift vouchers* on page 421.

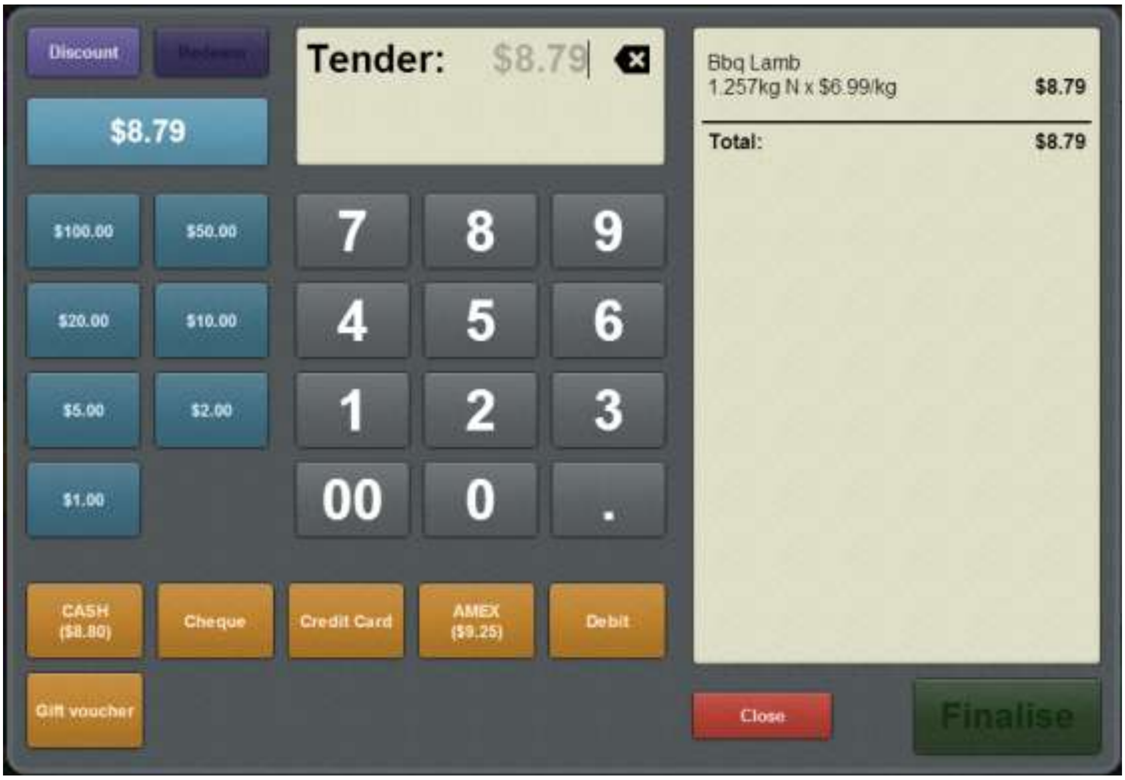
Important note: The Portal checks each gift voucher's serial number and amount as it is tendered. The gift voucher may be rejected if it is invalid or if your Portal configuration does not allow gift vouchers to be redeemed. The server may also correct the amount that the voucher contains. Check the amount in the Transaction list once you have tendered the gift voucher.

I can't tender the gift voucher: Gift vouchers cannot be tendered if the terminal is offline.

To tender a gift voucher:

1. Press  on the Transaction screen.

   The Tender screen is displayed.



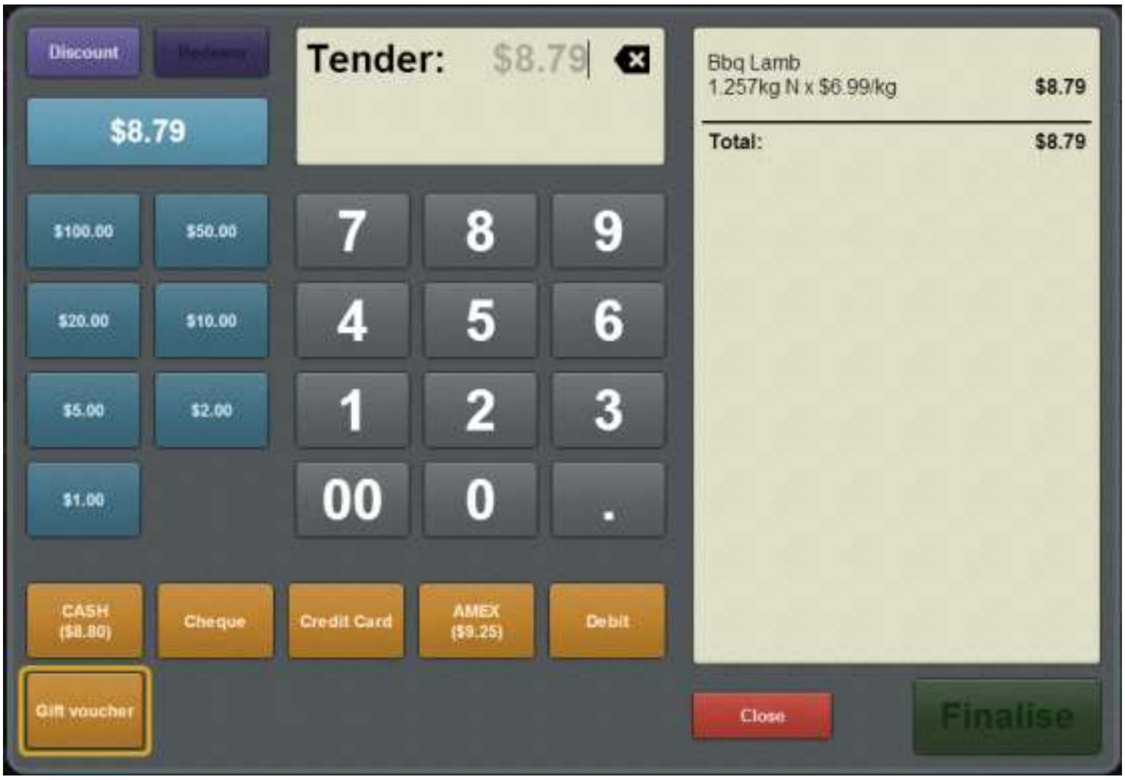
Tender: $8.79

Bbq Lamb
1.257kg N x $6.99/kg $8.79

Total: $8.79

See *Tender screen* on page 502.

2. Press the Tender type button for gift vouchers.



Tender: $8.79

Bbq Lamb
1.257kg N x $6.99/kg $8.79

Total: $8.79

Note: The Tender type buttons are configured on the Portal and may appear differently to the documentation.

The gift voucher is submitted to the Portal, which verifies the serial number and amount. Verifying may take several seconds.

The Transaction list displays either:

- The accepted gift voucher.

Bbq Lamb
1.257kg N x $6.99/kg $8.79
Total: $8.79
Gift Voucher $8.79
Balance: $0.00

- The rejected gift voucher.

Bbq Lamb
1.257kg N x $6.99/kg $8.79
Total: $8.79
[Rejected] ~~Gift Voucher~~ ~~$66.66~~
Balance: $8.79

3. If you need to add another tender, see *Splitting a tender* on page 482.

4. When the amount has been paid in full, press Finalise.

   The transaction is finalised and the Tender screen is closed.

   The Transaction screen is ready for the next transaction.

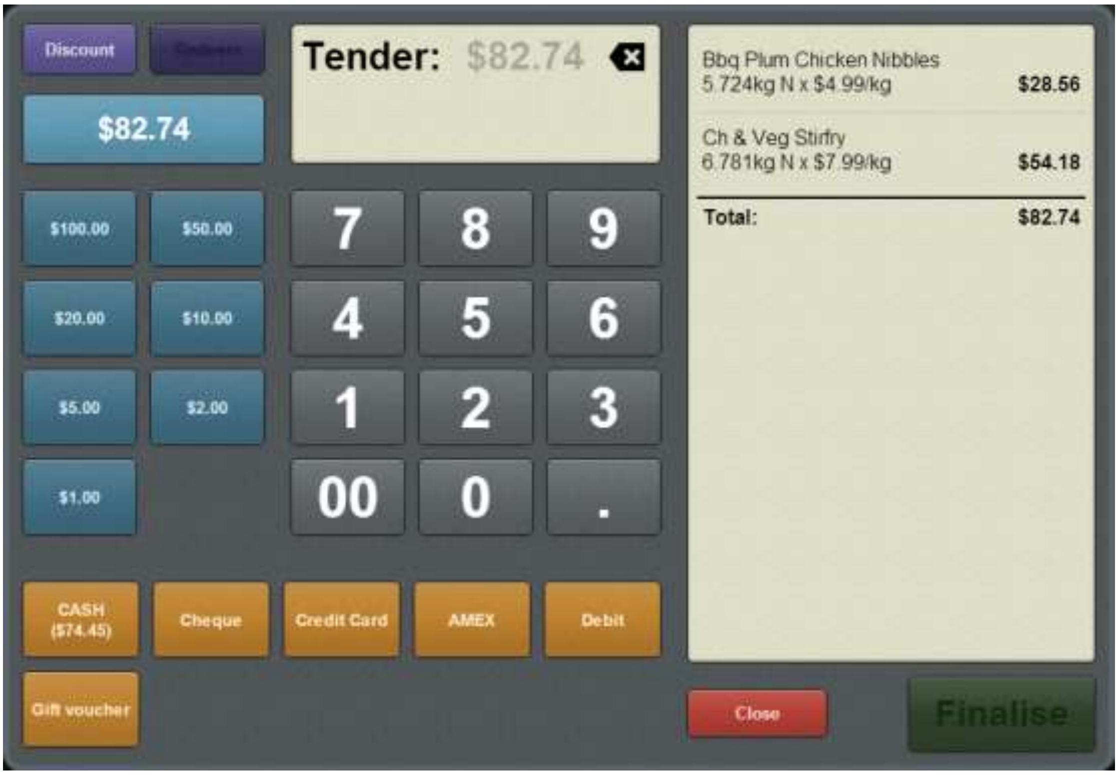
Splitting a tender

Split a tender when the customer wants to use two or more payment methods to complete a transaction.

To add a split tender:

1. On the Transaction screen, press **Tender**.

   The Tender screen is displayed.

   Tender: $82.74

Bbq Plum Chicken Nibbles 5.724kg N x $4.99/kg	$28.56
Ch & Veg Stirfry 6.781kg N x $7.99/kg	$54.18
Total:	$82.74

   See *Tender screen* on page 502.

2. For each tender you want to add:
   1. Select the tender amount by either:
      - Typing the amount of the payment using the keypad.
      - Pressing the Quick amount buttons on the left.
      - Pressing the Exact amount button.

      > **Tip:** You can combine these options. For example, you can press the Exact amount button and then add more using the cash amounts or keypad.

   2. Press the Tender type button that corresponds to the payment type.

      The tender is added to the transaction.

Also see:

- *Tendering cash* on page 471.
- *Tendering EFTPOS* on page 473.
- *Tendering gift vouchers* on page 478.
- *Tendering debtor payments* on page 476.

3. When the amount has been paid in full, press **Finalise**.

   The transaction is finalised and the Tender screen is closed.

   The Transaction screen is ready for the next transaction.

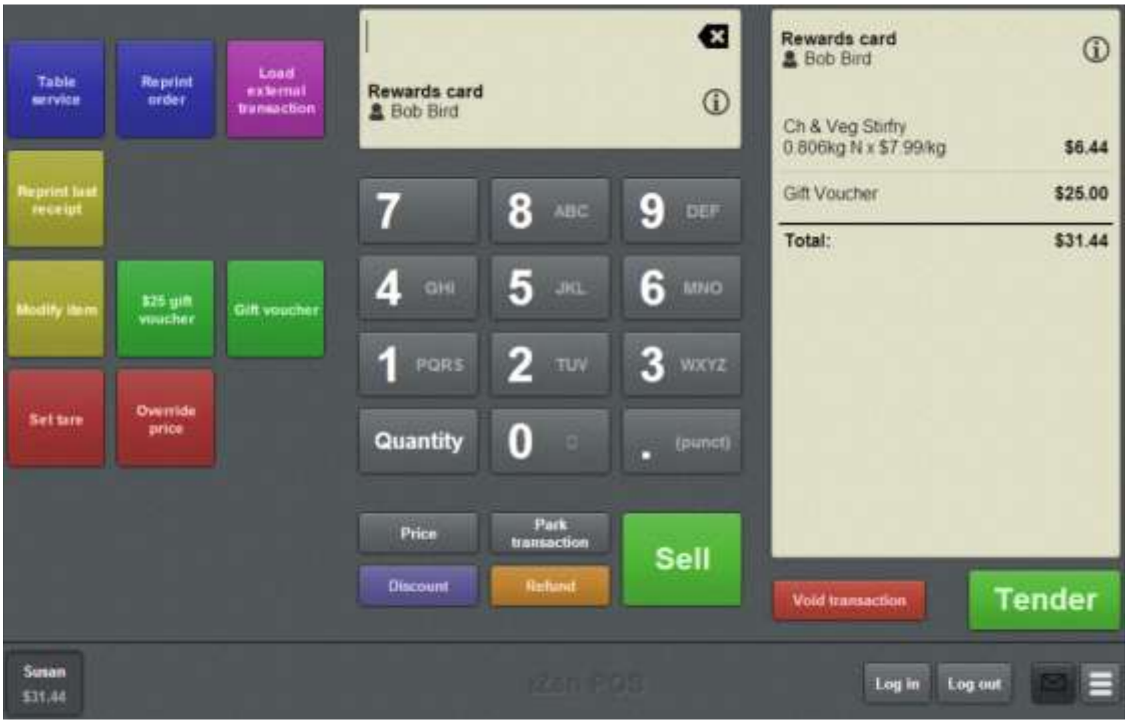
Redeeming loyalty points

Redeem a customer's loyalty points to pay for part or all of a transaction.

> **I can't redeem loyalty points:** You can only redeem loyalty points if the loyalty card type permits loyalty points redemption, and the customer has accumulated enough loyalty points to redeem.

To redeem loyalty points:

1. On the Transaction screen, scan the customer's loyalty card into the transaction.

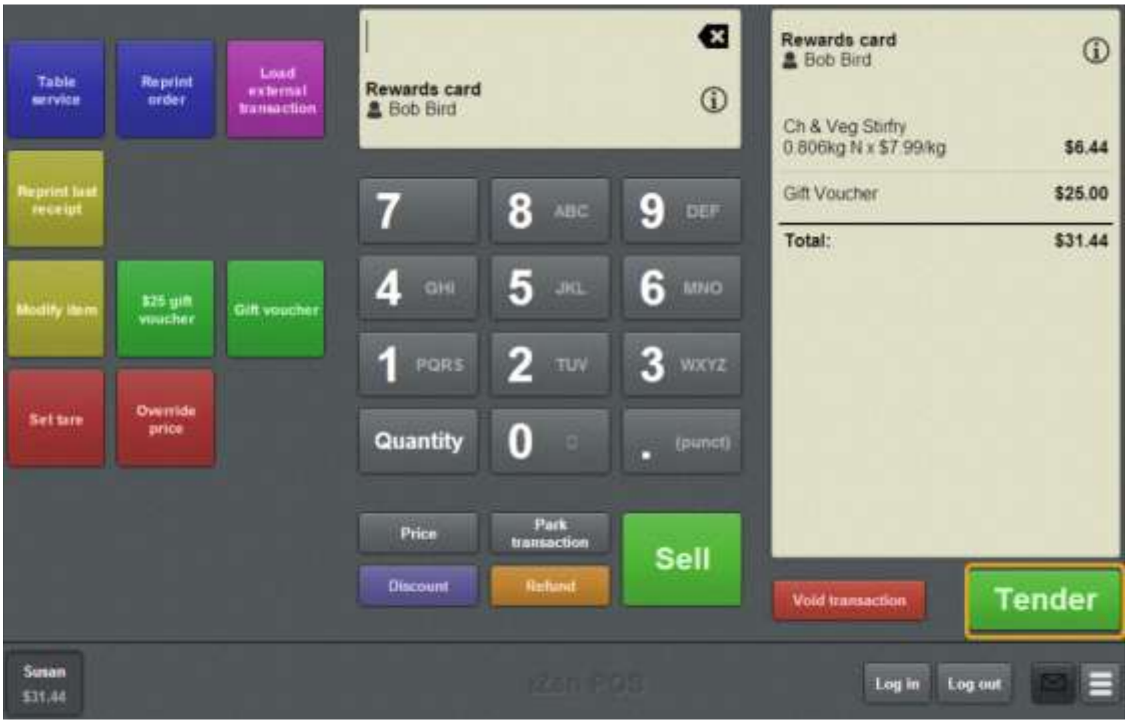


Rewards card
Bob Bird

Ch & Veg Stirfry 0.806kg N x $7.99/kg	$6.44
Gift Voucher	$25.00
Total:	$31.44

   See *Adding a loyalty card* on page 444.

2. Press **Tender**.

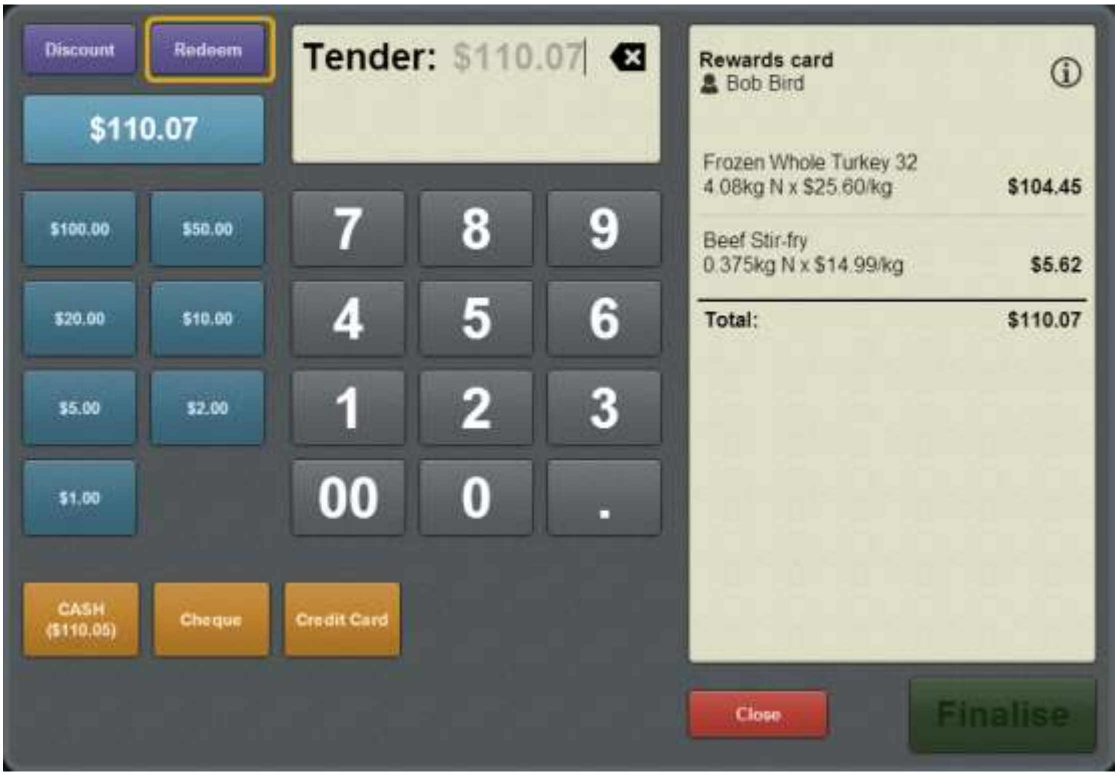


Rewards card
Bob Bird

Ch & Veg Stirfry 0.806kg N x $7.99/kg	$6.44
Gift Voucher	$25.00
Total:	$31.44

The Tender screen is displayed.

3. On the Tender screen, press Redeem.

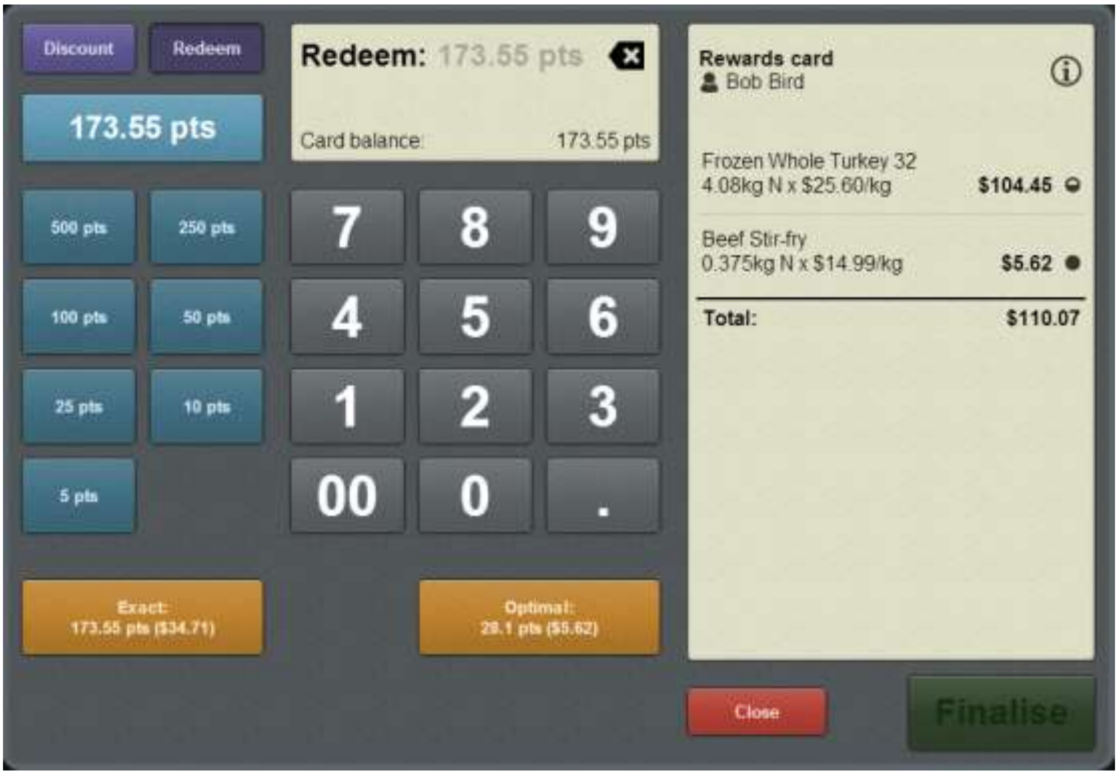


Tender: $110.07

Rewards card
Bob Bird

Frozen Whole Turkey 32 4.08kg N x $25.60/kg	$104.45
Beef Stir-fry 0.375kg N x $14.99/kg	$5.62
Total:	$110.07

The Tender screen displays the loyalty point equivalent on each of the Quick amount buttons.



4. If the customer wants to redeem a specific number of points, type the amount in.

> **Tip:** You can use the keypad in conjunction with the Quick amount buttons to type in the number of points.

5. Press either:
   - The **Exact** button to redeem the exact number of loyalty points you selected.
   - The **Optimal** button to redeem the optimum number of points up to the amount you selected.

   > **Note:** Loyalty points are only accrued for items that are purchased in full. If an item is purchased using redeemed loyalty points, no loyalty points are accrued for that item. The optimum option redeems the maximum number of points possible without partially paying for any items, so the customer can still accrue loyalty points for those items.

   The loyalty points are redeemed.

   The transaction balance is updated.

> **Note:** Depending on your Point of Sale configuration, you may need a supervisor's authorisation. If you are a supervisor, you may need authorisation from another supervisor.

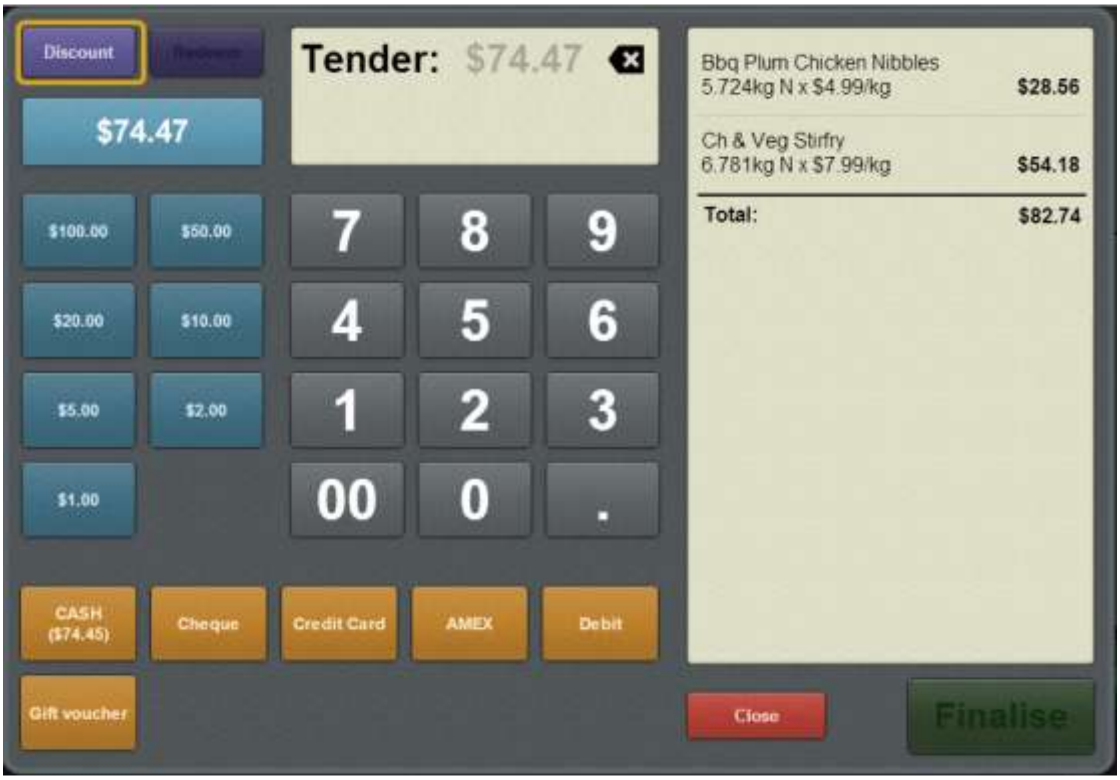
Discounting a transaction

Discount a transaction to apply the same discount to an entire transaction.

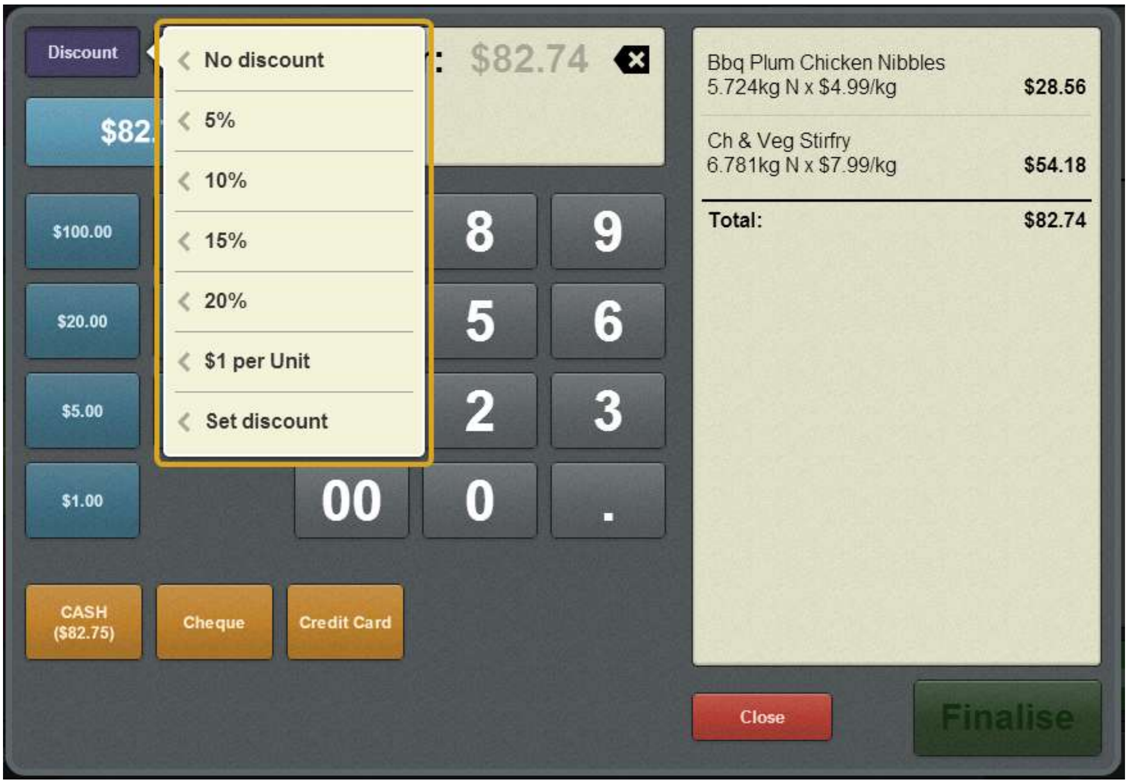
> **Note:** If you want to discount an individual item, see *Applying a discount to an item* on page 434.

To discount a transaction:

1. On the Tender screen press **Discount**.



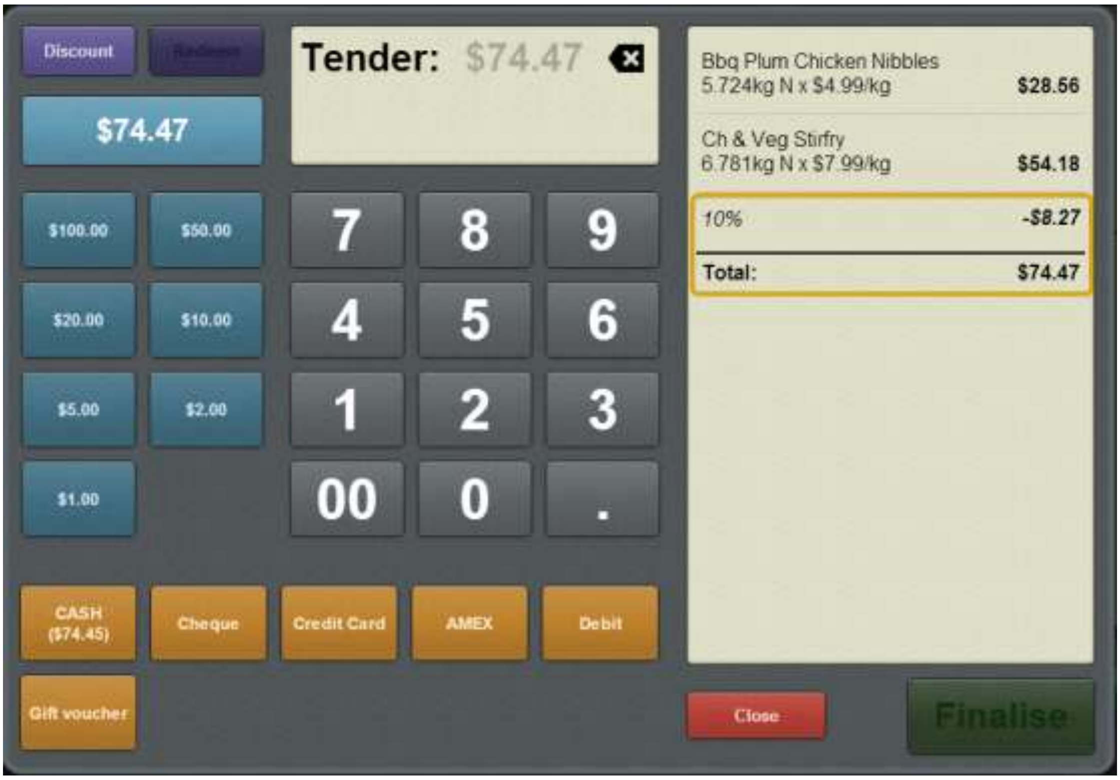
The list of available discounts is displayed.



Bbq Plum Chicken Nibbles 5.724kg N x $4.99/kg	$28.56
Ch & Veg Stirfry 6.781kg N x $7.99/kg	$54.18
Total:	$82.74

2. Press the discount you want to apply.

   The discount is applied to the transaction.



Bbq Plum Chicken Nibbles 5.724kg N x $4.99/kg	$28.56
Ch & Veg Stirfry 6.781kg N x $7.99/kg	$54.18
10%	-$8.27
Total:	$74.47

Note: Individual items may have a maximum discount set. The Point of Sale automatically applies the discount up to each item's maximum. For example, if an item has a discount maximum of 10%, and you apply a 30% discount to the transaction, that item is only discounted 10%.

Note: Depending on your Point of Sale configuration, you may need a supervisor's authorisation. If you are a supervisor, you may need authorisation from another supervisor.

Voiding a tender

Voiding a tender removes it from the transaction and returns the transaction balance to its previous amount. Void a tender if you have submitted an incorrect amount or tender type and have not finalised the transaction yet.

I can't change a tender amount or type: Tenders cannot be changed once they have been added to a transaction; you must void the tender and re-submit it. See *Changing a tender* on page 493.

I can't void this tender: Tenders can only be voided if the transaction has not been finalised, and if your Portal configuration allows this tender type to be voided. If you have finalised a transaction and need to change the tenders, you must refund the items and put the transaction through again. See *Refunding an item* on page 424.

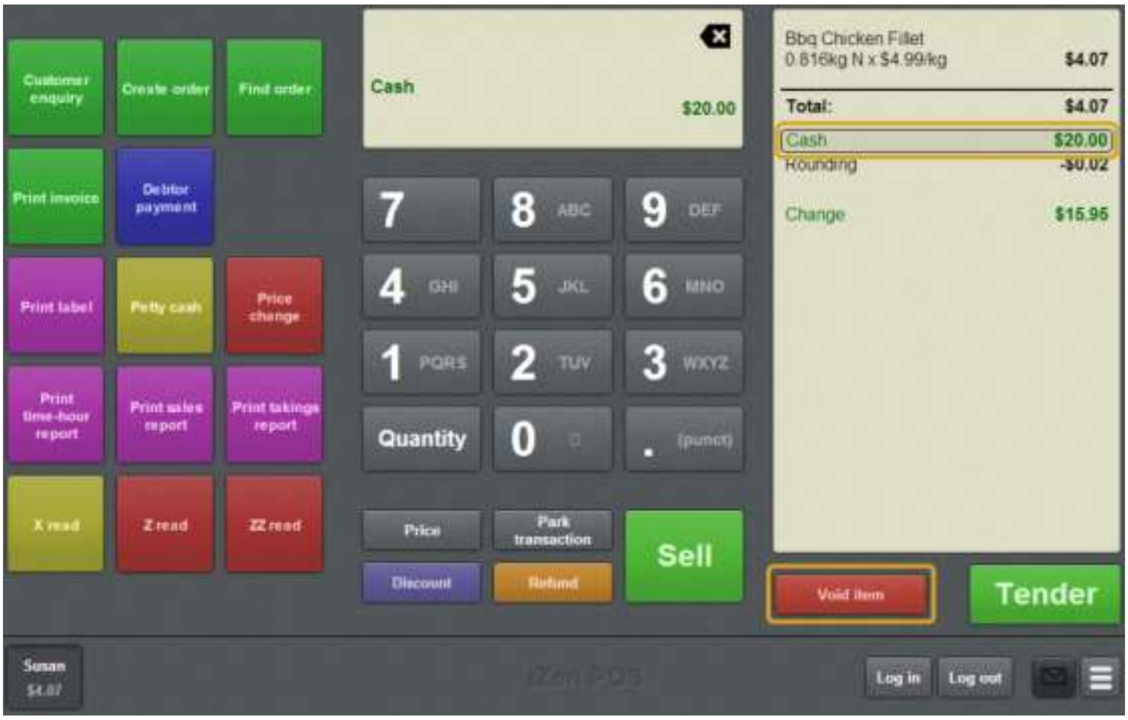
I voided a tender and it came back: If you submit a tender through the Tyro EFTPOS system, that tender cannot be voided while the EFTPOS pinpad is processing it. If you void a tender during this period, the Point of Sale reinstates the tender once the pinpad has processed it, and you must process the refund manually through the EFTPOS pinpad.

To void a tender:

1. Press Close to return to the Transaction screen.

2. Press the tender you want to void.

3. Press Void item.



> **Note:** Depending on your Portal configuration, you may not be able to void some types of tenders. If the Void item button is disabled, you must void the entire transaction and create it again. See *Voiding a transaction* on page 453.

The tender is voided.

Changing a tender

Once you have submitted a tender, it cannot be altered. If you need to change a tender:

1. Void the incorrect tender.
2. Add the correct one to the transaction.

See *Voiding a tender* on page 490.

Also see *Adding a tender* on page 469.

> **Note:** If the transaction has been finalised, you cannot void a tender. You must refund the transaction using the same tender type and put it through again with the correct tender. See *Refunding an item* on page 424.

Collecting customer information

If your Point of Sale is configured to collect customer information, the tender screen prompts you with information fields when you finalise the transaction.

See *Setting up collection of customer information* on page 36.

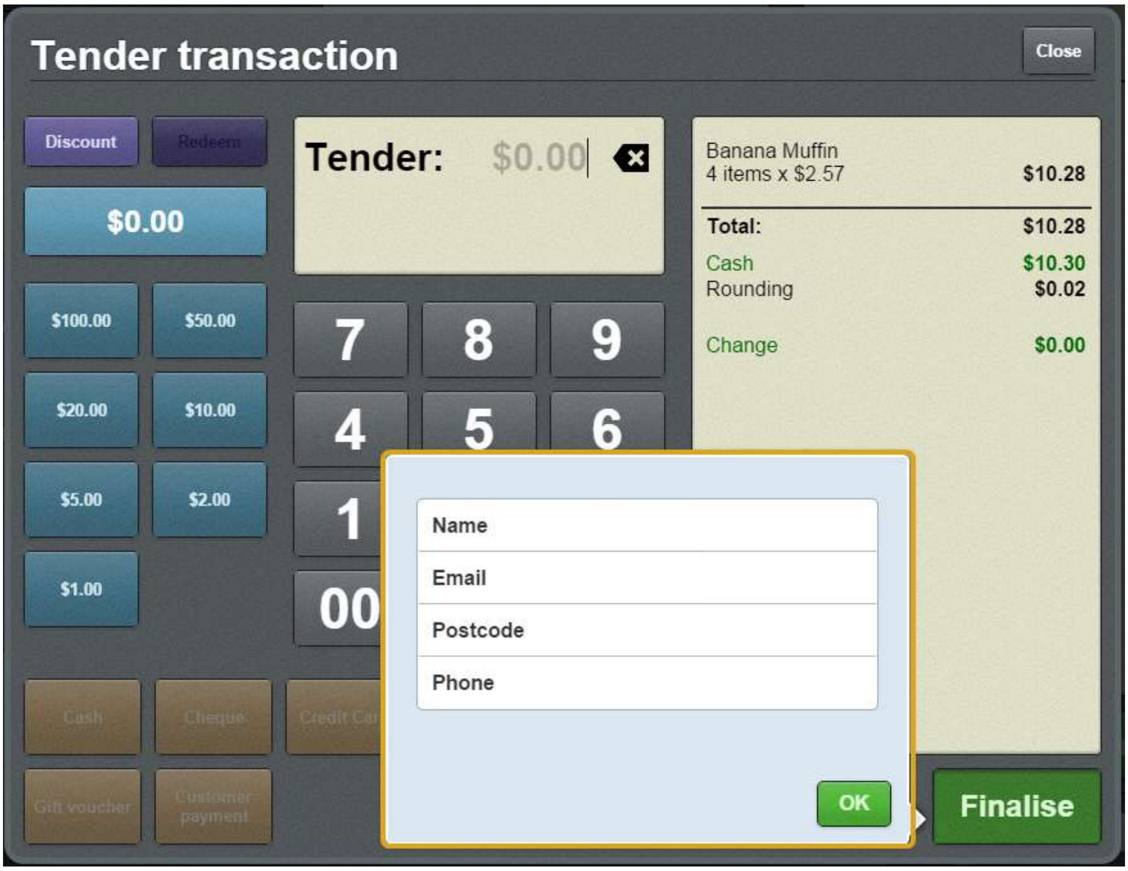
To record customer information:

1. Tender the transaction as normal.

   See *Tendering transactions* on page 465.

2. Press **Finalise**.

   The customer information fields are displayed.



Tender transaction

Tender: $0.00

Banana Muffin 4 items x $2.57	$10.28
Total:	$10.28
Cash	$10.30
Rounding	$0.02
Change	$0.00

> **Note:** Your information fields may be different to the documentation.

> **Note:** If a loyalty member or debtor has been added to the transaction, their information is automatically added to these fields. See *Adding a loyalty card* on page 444.

3. Type or edit the information as required.

> **Note:** If your Point of Sale is configured to email the receipt to the customer, and the customer does not want a receipt emailed, keep the **Email** field blank. Their loyalty information is not changed by this action.

4. Press OK.

   The customer information is recorded.

Emailing customers a receipt

If your Point of Sale is configured to email customers a copy of the receipt, the tender screen prompts you with information fields when you finalise the transaction.

See *Setting up emailed receipts* on page 38.

To email a receipt:

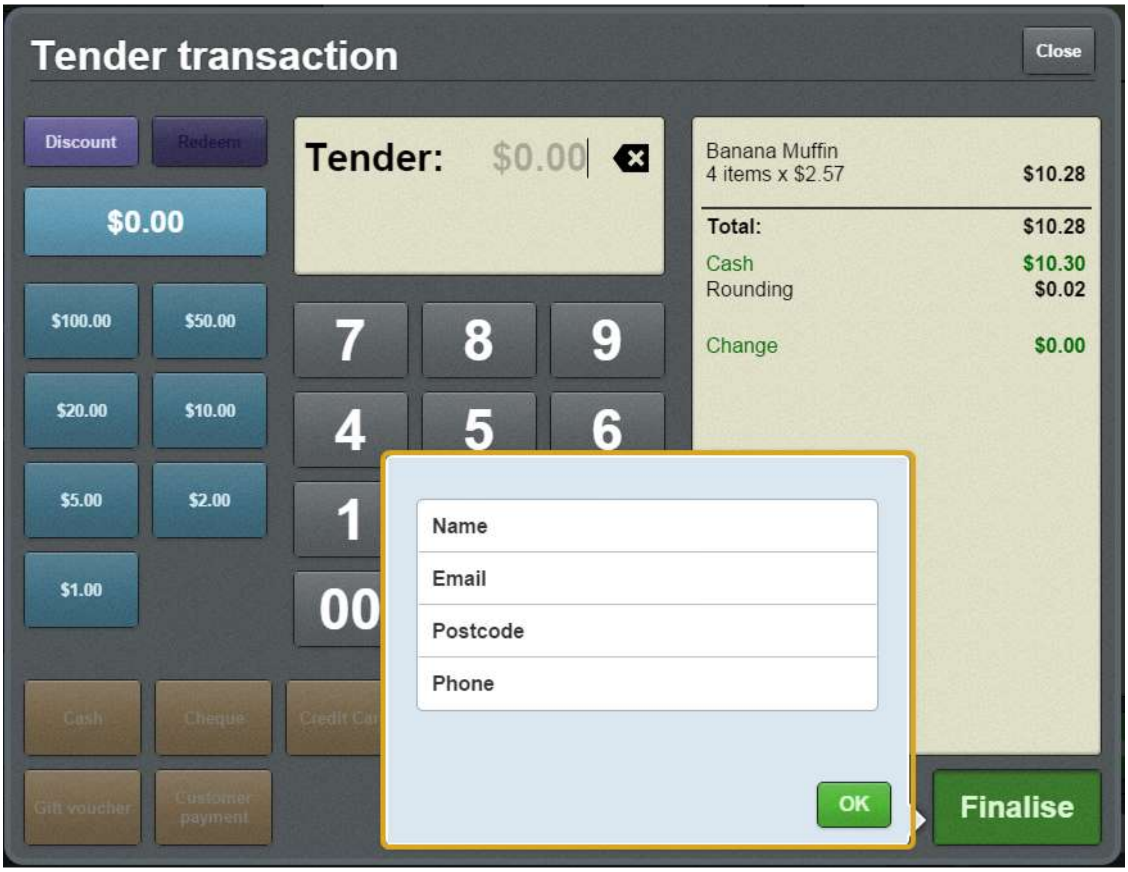
1. Tender the transaction as normal.

   See *Tendering transactions* on page 465.

2. Press 

.

   The customer information fields are displayed.



Banana Muffin
4 items x $2.57 $10.28

Total: $10.28
Cash $10.30
Rounding $0.02
Change $0.00

Note: Your information fields may be different to the documentation.

Note: If a loyalty member or debtor has been added to the transaction, their information is automatically added to these fields. See *Adding a loyalty card* on page 444.

3. Type the email address into the **Email** field.

   > **Note:** If the customer does not want a receipt emailed, keep the **Email** field blank. Any loyalty information is not changed by this action.

4. Press OK.

   The receipt is emailed.

Preventing a receipt being emailed to a customer

If your Point of Sale is configured to email customers a copy of the receipt, the tender screen prompts you with information fields when you finalise the transaction. If the customer does not want a receipt emailed, you can prevent the email by keeping the Email field blank.

See *Setting up emailed receipts* on page 38.

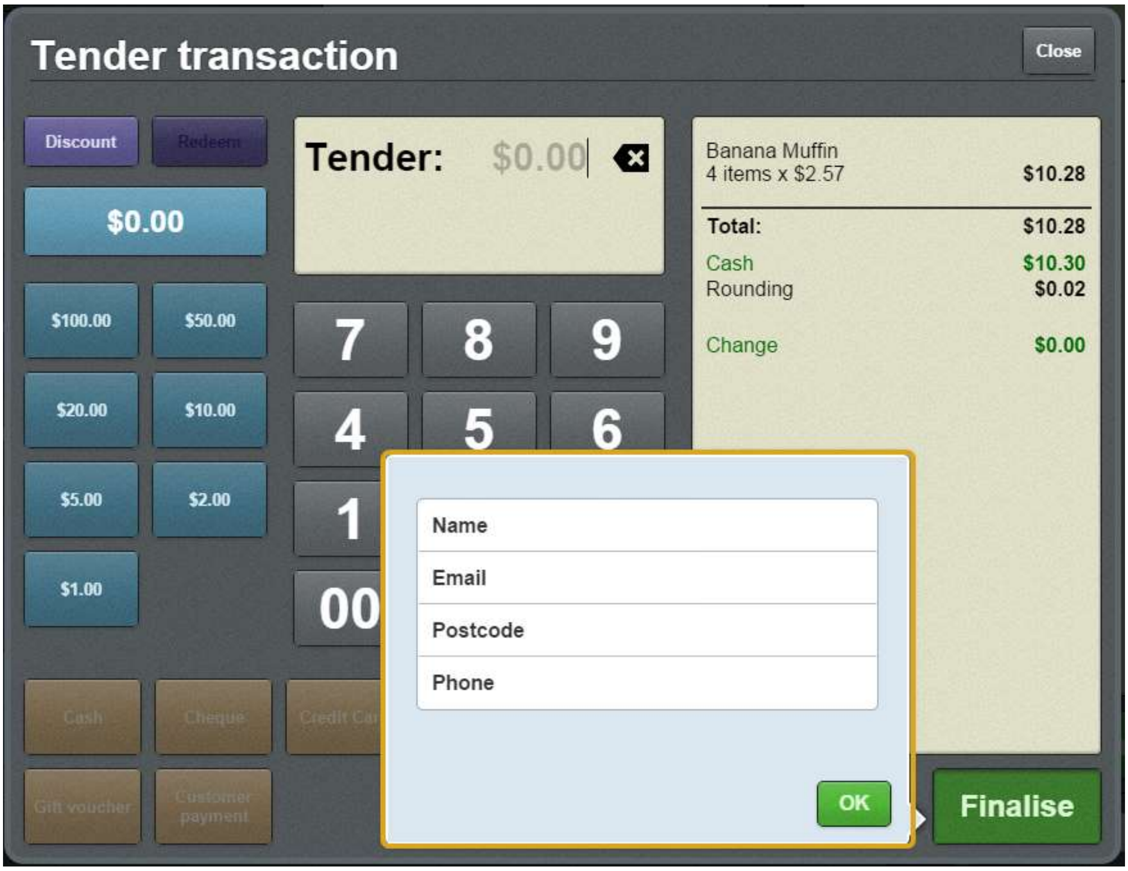
To prevent a receipt being emailed:

1. Tender the transaction as normal.

   See *Tendering transactions* on page 465.

2. Press **Finalise**.

   The customer information fields are displayed.



Banana Muffin
4 items x $2.57 $10.28
Total: $10.28
Cash $10.30
Rounding $0.02
Change $0.00

> **Note:** Your information fields may be different to the documentation.

> **Note:** If a loyalty member or debtor has been added to the transaction, their information is automatically added to these fields. See *Adding a loyalty card* on page 444.

3. Delete the email address from the **Email** field, if any is pre-filled.

> **Note:** If the customer is a loyalty member, this does not change their loyalty information.

4. Press OK.

   The transaction is finalised without emailing a receipt.

Recording a tax exempt ID during tender

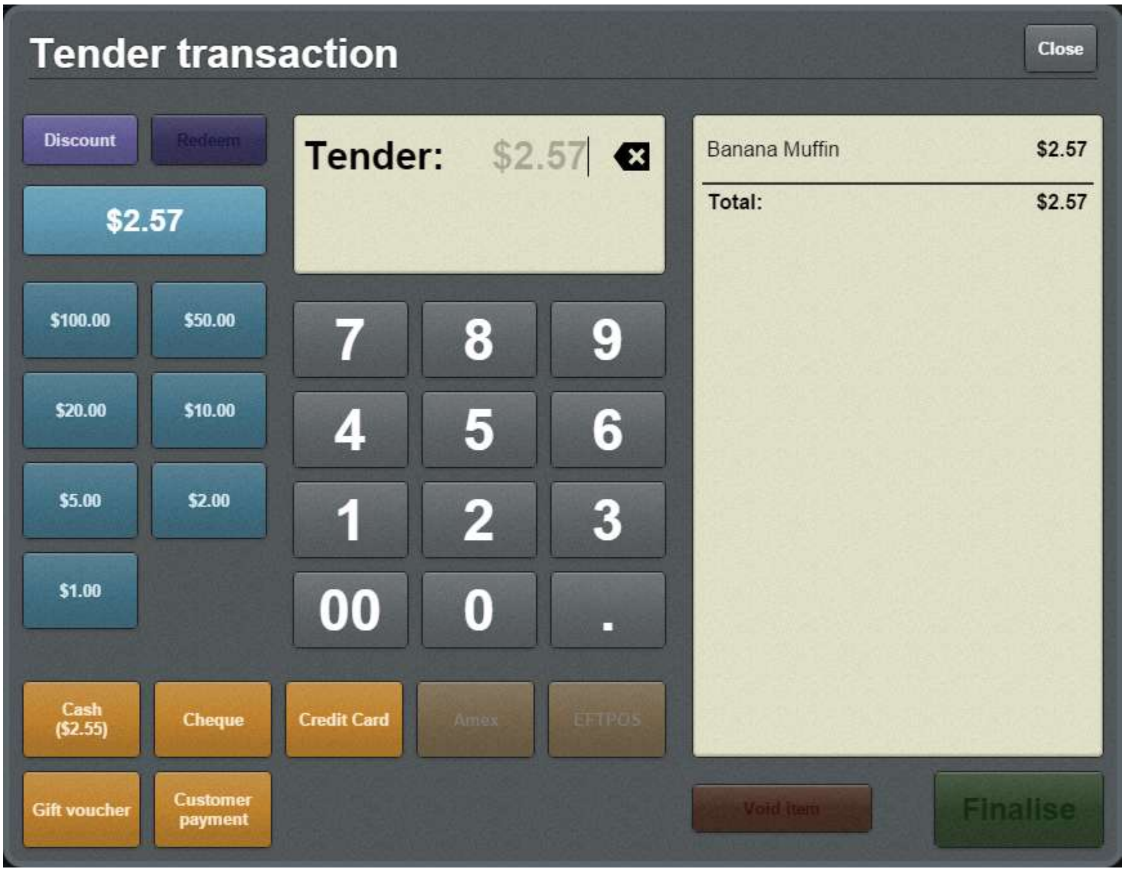
If you have applied a discount that includes a tax exempt status, or set a transaction as tax exempt, you must provide the customer's senior citizen ID or tax exempt ID when tendering. These fields cannot be left blank.

> **Note:** If the customer cannot provide a valid ID, you must remove the tax exempt status or the discount in order to finalise the transaction. See *Discounting a transaction* on page 487. Also see *Setting a transaction as tax exempt* on page 439,

To record a customer's tax exempt ID:

1. From the transaction screen, press **Tender**.

   The tender screen is displayed.



Tender: $2.57

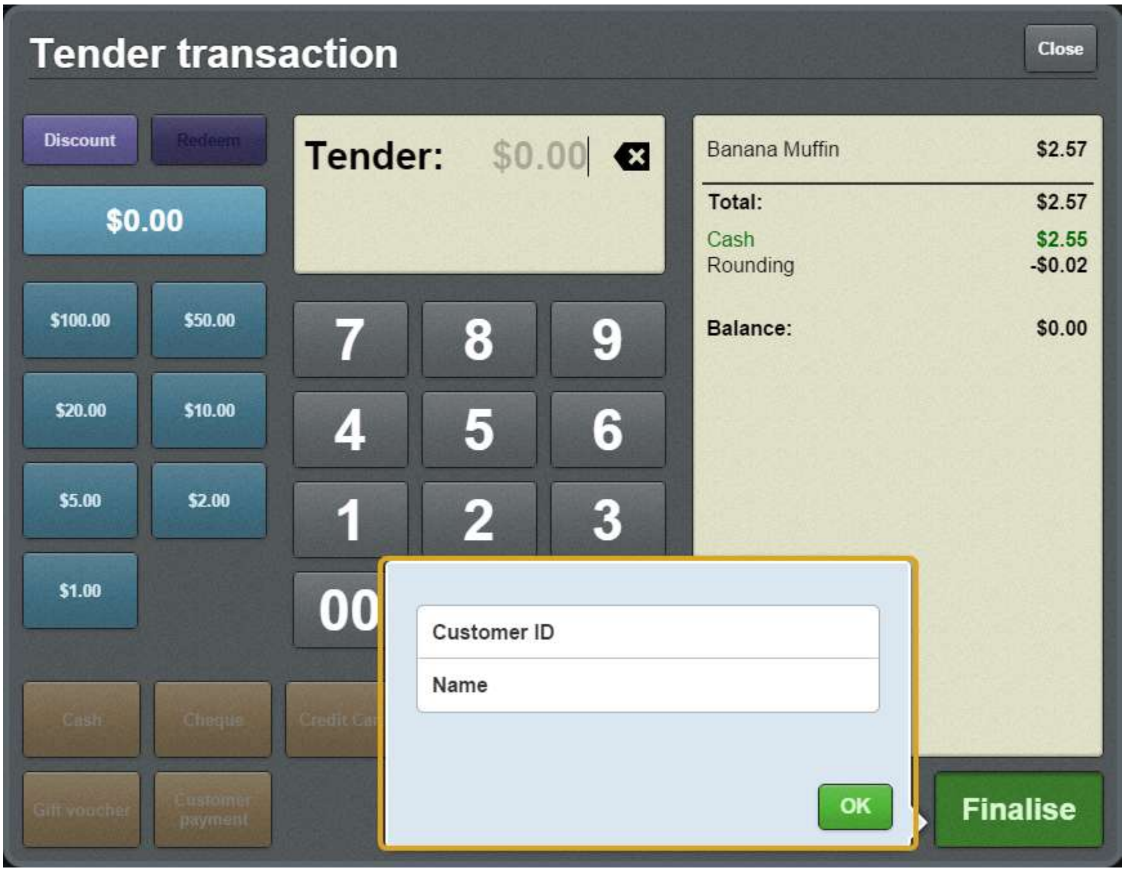
Banana Muffin	$2.57
Total:	$2.57

2. Tender the transaction as normal.

   See *Adding a tender* on page 469.

3. When the transaction is ready to finalise, press **Finalise**.

A popup screen is displayed.



Banana Muffin	$2.57
Total:	$2.57
Cash	$2.55
Rounding	-$0.02
Balance:	$0.00

4. Type the customer's tax exempt ID or senior citizen ID into the **Customer ID** field.
5. Type the customer's name into the **Name** field.
6. Press OK.

   The transaction is finalised.

Tender screen

Use the Tender screen to:

- Process payments of transactions.

  See *Adding a tender* on page 469

  Also see *Splitting a tender* on page 482.

- Specify a cash-out amount for applicable tenders.
- Apply discounts to the whole transaction.

  See *Discounting a transaction* on page 487.

- Redeem loyalty points.

  See *Redeeming loyalty points* on page 484.

Opening the Tender screen

To open the Tender screen:

1. Log in to the Point of Sale.

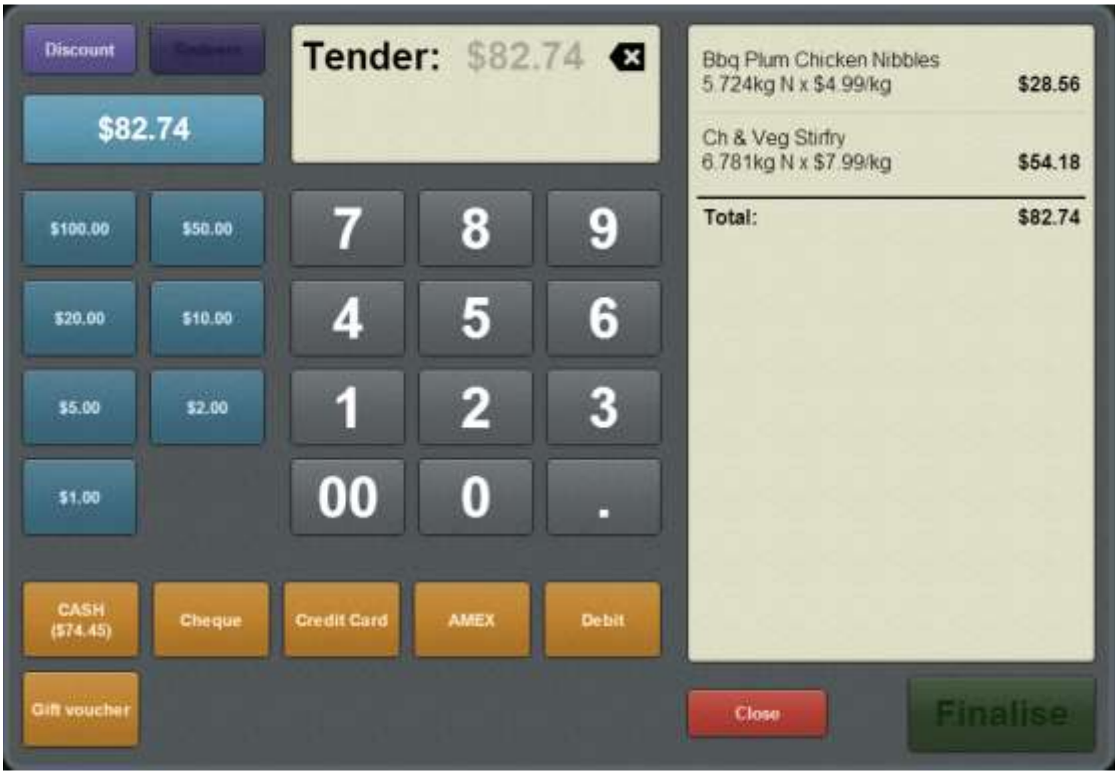
   See *Logging in to the terminal* on page 348.

2. Add items to the transaction.

   See *Selling and refunding items* on page 409.

3. Press **Tender**.

   The Tender screen is displayed

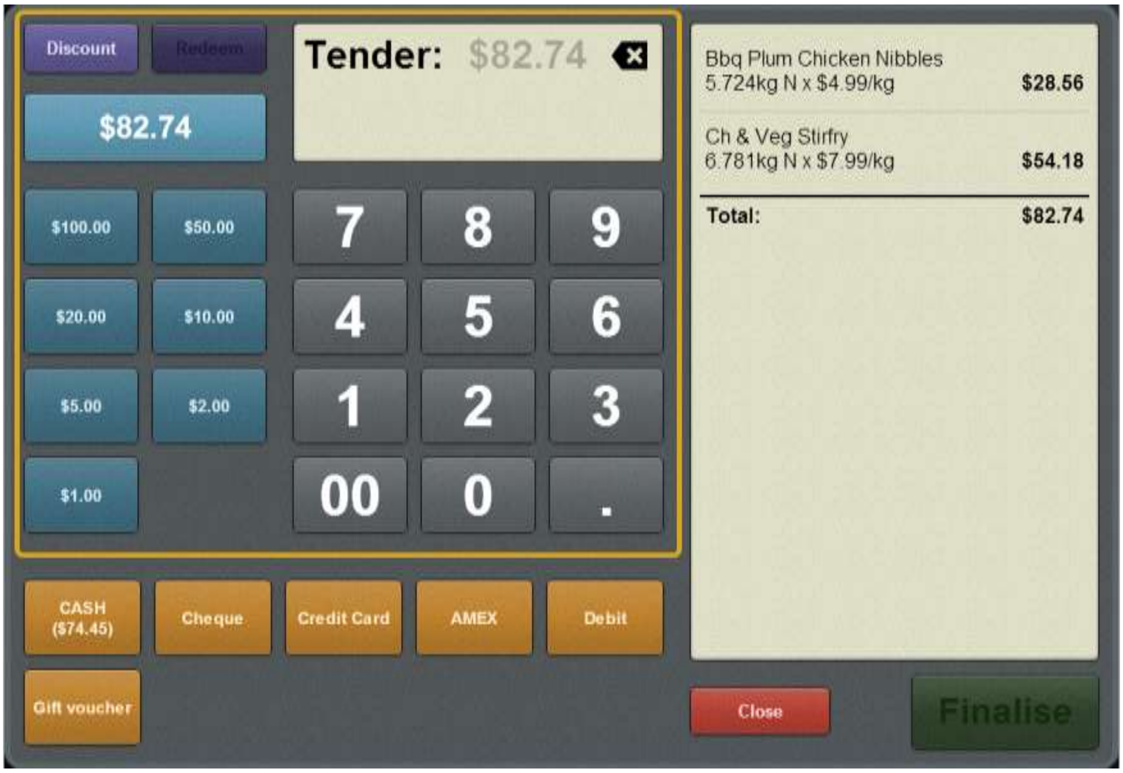


Tender: $82.74

Bbq Plum Chicken Nibbles 5.724kg N x $4.99/kg	$28.56
Ch & Veg Stirfry 6.781kg N x $7.99/kg	$54.18
Total:	**$82.74**

Tender screen key fields and buttons

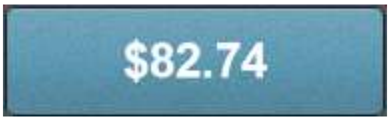
Tender amount area



Bbq Plum Chicken Nibbles 5.724kg N x $4.99/kg	$28.56
Ch & Veg Stirfry 6.781kg N x $7.99/kg	$54.18
Total:	$82.74

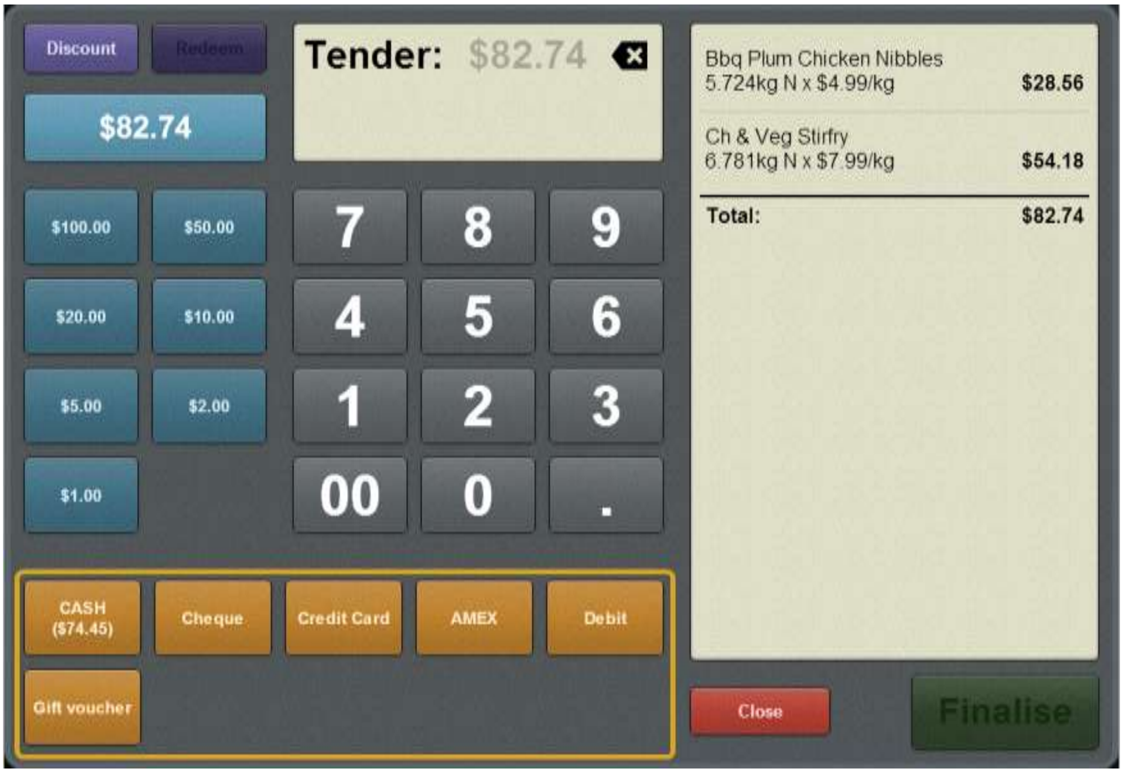
Use the Tender amount area to:

- Select an amount in cash or loyalty points to tender.
- Apply discounts to the transaction.

Field	Description
	Press to apple a discount to the entire transaction. See *Discounting a transaction* on page 487. **Note:** The Point of Sale applies the discount to each item up to that item's discount maximum. For example, if an item has a discount maximum of 5% and you select a 20% discount for the transaction, that item is only discounted 5%. This also applies to flat-amount discounts such as "1$ off".
	Press to redeem loyalty points for some or all of the tender amount. See *Redeeming loyalty points* on page 484.
	Press the **Exact amount** button to select the remaining tender amount. **Note:** The amount displayed on this button depends on the remaining transaction balance.
	The Item field displays the current tender amount, discount or loyalty points. **Tip:** Hold down ⌫ to quickly clear the tender field.
	Press Quick amount buttons to add to the current tender. For example, if the customer has given you fifteen dollars, you can press $10 and $5 instead of typing the amount in the keypad. **Note:** When redeeming loyalty points, these buttons reflect the number of points equivalent to the cash amount. A $100 button displays $100 worth of points.

Field	Description
	Type an amount to tender on the keypad.

Tender type area



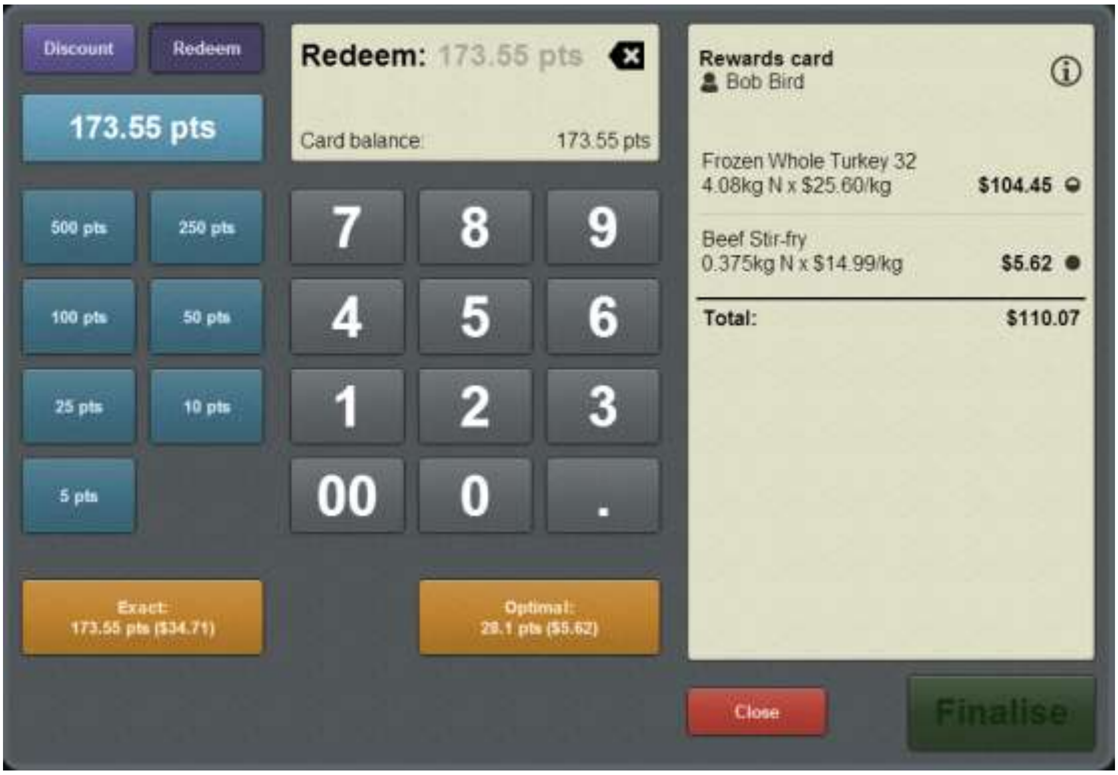
Bbq Plum Chicken Nibbles 5.724kg N x $4.99/kg	$28.56
Ch & Veg Stirfry 6.781kg N x $7.99/kg	$54.18
Total:	$82.74

Use the Tender type area to submit a tender.

Note: A tender type is disabled if the payment amount you have selected is not permitted for that type. For example, credit cards and debit cards cannot pay more than the amount of the sale. If a sale total is $20 and you type $25, the credit card and debit card tender types are disabled. Once the full amount of the sale has been tendered, all tender types are disabled.

Note: The available tender types and their applicable amounts are configured using the Portal.

Loyalty area



Redeem: 173.55 pts

Card balance: 173.55 pts

Rewards card
Bob Bird

Frozen Whole Turkey 32 4.08kg N x $25.60/kg	$104.45
Beef Stir-fry 0.375kg N x $14.99/kg	$5.62
Total:	**$110.07**

> **Note:** The Loyalty area is only displayed if you press Redeem.

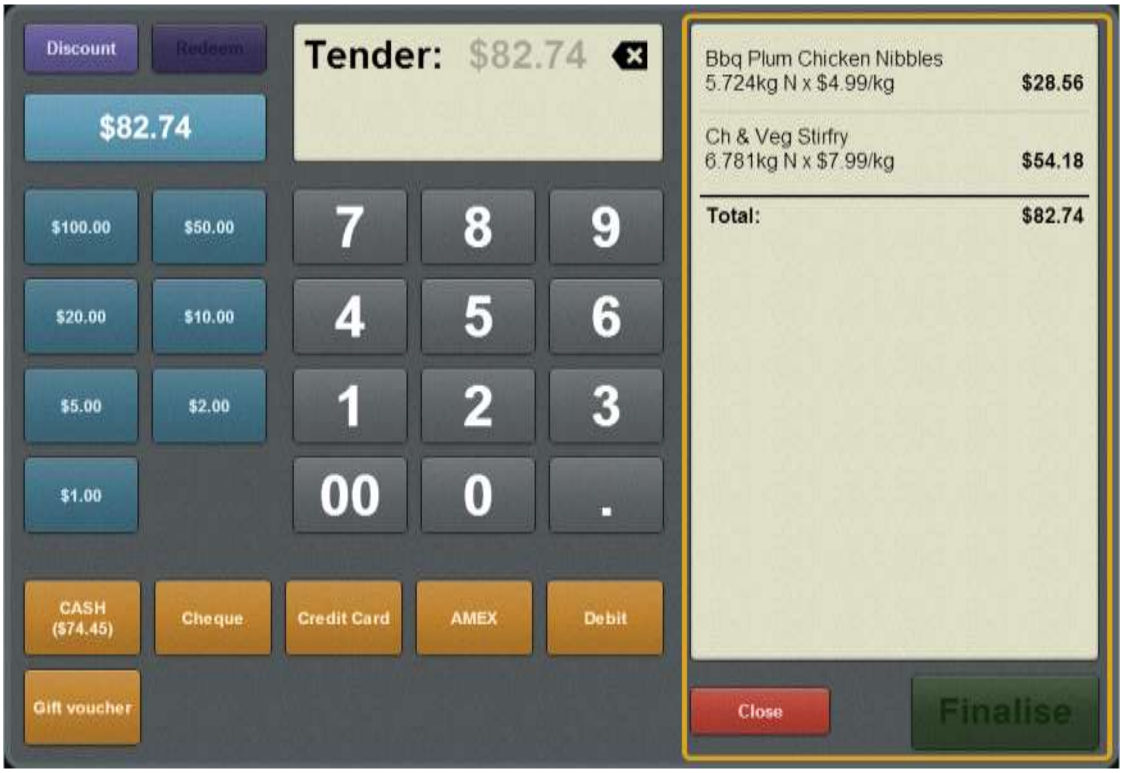
Use the Loyalty area to submit a redemption of loyalty points. You can either:

- Redeem the exact amount selected.
- Redeem the maximum loyalty points without partially-redeeming an item.

  See *Redeeming loyalty points* on page 484.

> **Note:** Loyalty points cannot be redeemed if the customer has not accrued points or the Portal configuration does not permit loyalty point redemption.

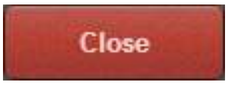
Transaction list area



Bbq Plum Chicken Nibbles 5.724kg N x $4.99/kg	$28.56
Ch & Veg Stirfry 6.781kg N x $7.99/kg	$54.18
Total:	$82.74

Use the Transaction list area to:

- View tenders that have been submitted to the transaction.
- Cancel the tender and return to the Transaction screen.
- Finalise the transaction.

Field	Description
 **Rewards card** Brian Smith Skinless Chicken Breast 16.358kg N x $5.99/kg $97.98 **Total:** $97.98 Rewards card redemption (50 pts) $10.00 Credit Card $50.00 Gift Voucher $20.00 CASH $20.00 Rounding $0.02 Change $2.00	The Transaction list displays: - All items included in the transaction. - Any discounts or price overrides applied. - Any service charges applied. - The number of the loyalty card, if one has been scanned. - All tenders for the transaction. - Any applicable tender surcharges. - The transaction total. - The balance of the transaction remaining. - Any change owed.
	Close the Tender screen without finalising the transaction. **Note:** All tenders already submitted to the transaction are retained.
	Finalise the sale and return to the Transaction screen. See *Tendering transactions* on page 465. **Note:** You can only finalise the transaction when the balance is zero.

Managing loyalty cards

Loyalty cards can be used to:

- Record a customer's details for advertising and promotions.
- Record the transactions a customer makes.
- Award a customer loyalty points for purchases.
- Reward a customer by redeeming loyalty points to pay for purchases.

Key concepts

Please see the *Glossary* on page 649 for information relating to the following terms:

Loyalty

Loyalty card

Transaction

Transaction list

Also see *Loyalty screen* on page 528.

What you can do:

The following topics explain the tasks related to loyalty cards:

- *Adding a loyalty card* on page 444.
- *Finding a loyalty card by name* on page 518.
- *Redeeming loyalty points* on page 484.
- *Creating loyalty cards* on page 512.
- *Viewing a customer's details* on page 514.
- *Viewing a loyalty balance* on page 516.
- *Editing loyalty card details* on page 520.
- *Updating a customer's photo* on page 522.
- *Signing customers in* on page 524.
- *Signing customers out* on page 526.

Creating loyalty cards

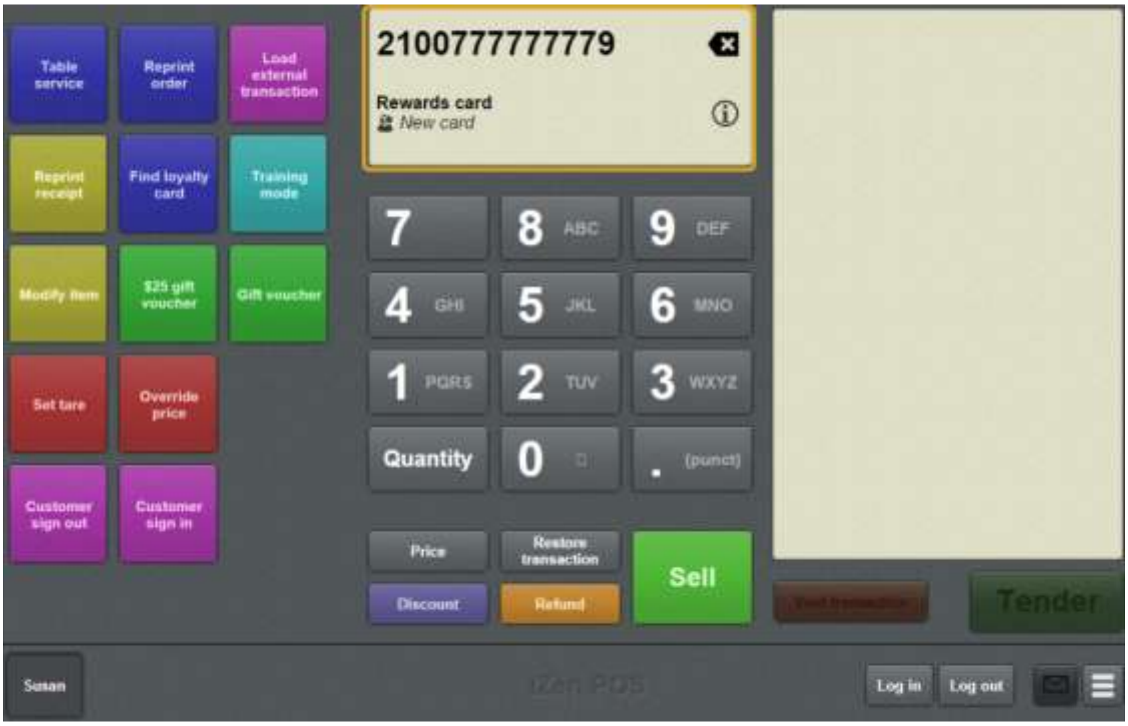
Create a loyalty card when a customer signs up for your loyalty program.

> **Note:** The card is not saved until the transaction is finalised. You must complete a transaction in order to create a loyalty card. Only one loyalty card can be created or used per transaction.

To create a loyalty card:

1. Scan or type in the barcode of the new card.

   The new card is displayed in the Item field.



2100777777779

Rewards card

New card

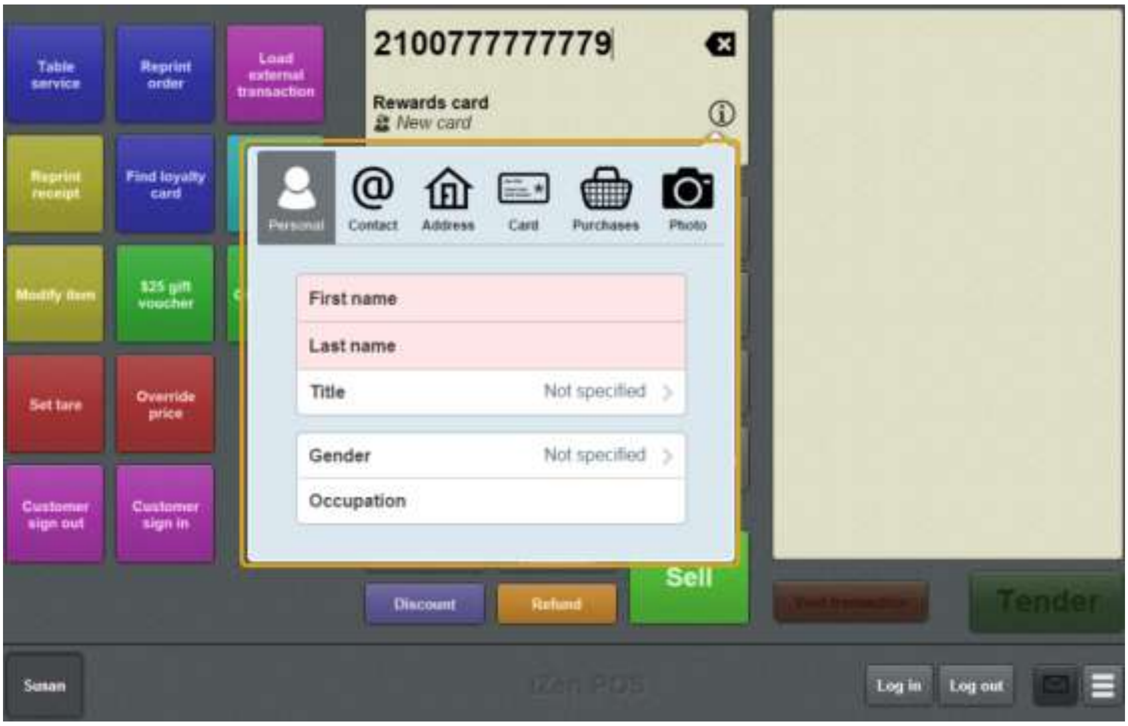
2. Press ⓘ.

   The Loyalty screen is displayed.

> **Note:** The Point of Sale displays whichever tab of the Loyalty screen you last used.

3. Press 👤.

   The Personal tab of the Loyalty screen is displayed.



2100777777779

Rewards card
New card

First name
Last name
Title Not specified
Gender Not specified
Occupation

4. Type the customer's first and last name into the fields.

> **Note:** Depending on your Portal configuration, some fields may be mandatory. The loyalty card cannot be created unless these fields are completed. If the loyalty card is incomplete, the ⓘ icon flashes. You can locate missing mandatory fields by looking for the red tab labels. The missing fields are shaded red.

5. Complete the other customer details as required.

   See *Loyalty screen* on page 528.

> **Tip:** Any mandatory fields are shaded in red.

6. Press Sell to add the new card to the transaction.
7. Continue with the transaction.

   The card is created when the transaction is finalised.

   See *Selling and refunding items* on page 409.

Viewing a customer's details

You can view the details attached to a customer's loyalty card without adding that card to a transaction. For example, you may need to check that a customer's address or contact details are up to date.

> **Note:** If you accidentally add the loyalty card to the transaction, you can void it like any other item in the transaction. If there are no other items in the transaction, void the entire transaction. See *Voiding an item* on page 451. Also see *Voiding a transaction* on page 453.

To view a customer's details:

1. Scan or type the loyalty number into the Transaction screen.

   The Item field displays the loyalty card information.

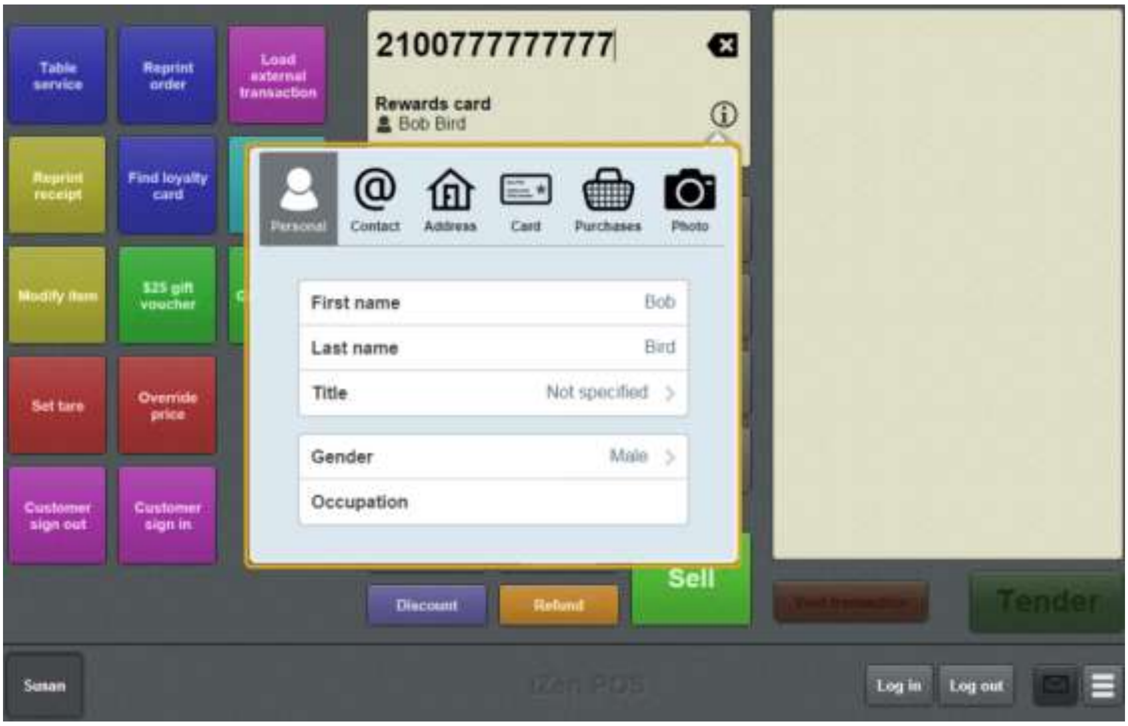
2100777777777

Rewards card

Bob Bird

2. Press ⓘ.

   The Loyalty screen is displayed with the customer's details.



2100777777777

Rewards card
Bob Bird

First name: Bob
Last name: Bird
Title: Not specified
Gender: Male
Occupation:

See *Loyalty screen* on page 528.

Viewing a loyalty balance

You can view a customer's loyalty point balance without adding that card to a transaction.

> **Note:** If you accidentally add the loyalty card to the transaction, you can void it like any other item in the transaction. If there are no other items in the transaction, void the entire transaction. See *Voiding an item* on page 451. Also see *Voiding a transaction* on page 453.
> **Note:** You can configure the terminal to require a supervisor's authorisation to perform this button's function. See *Terminal setup screen - Security tab* on page 50.

To view a customer's loyalty points balance:

1. Scan or type the loyalty number into the Transaction screen.

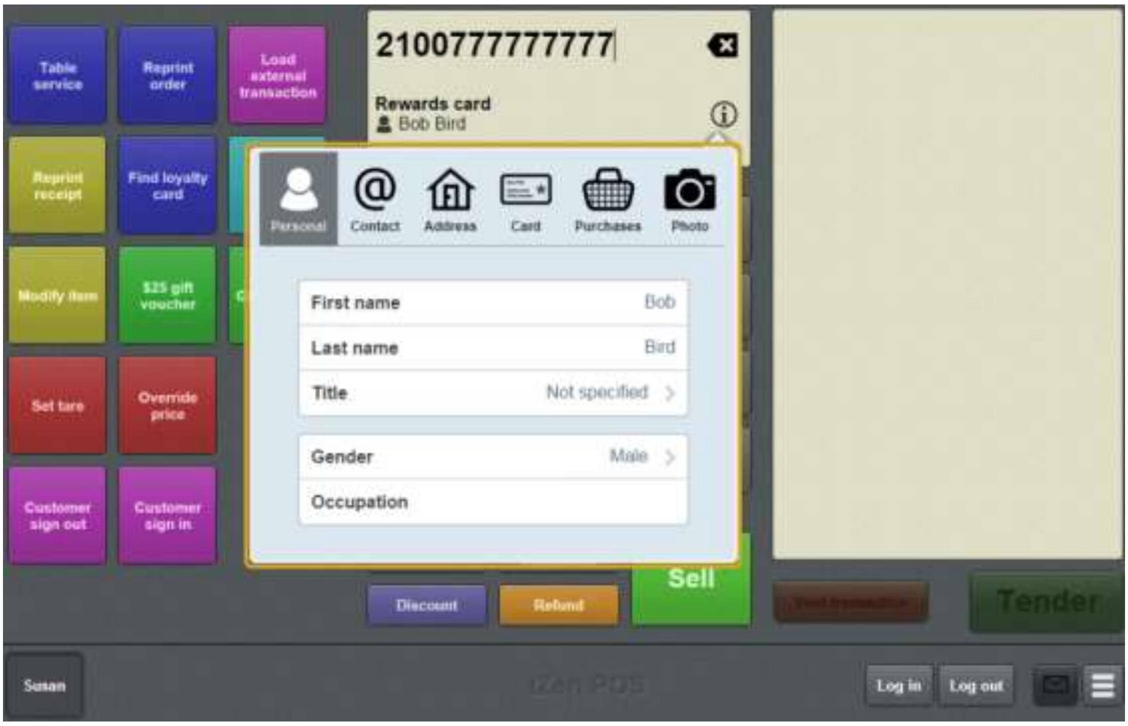
   The Item field displays the loyalty card information.

2100777777777

Rewards card
Bob Bird

2. Press ⓘ.

   The Loyalty screen is displayed with the customer's details.



2100777777777

Rewards card

Bob Bird

First name Bob

Last name Bird

Title Not specified

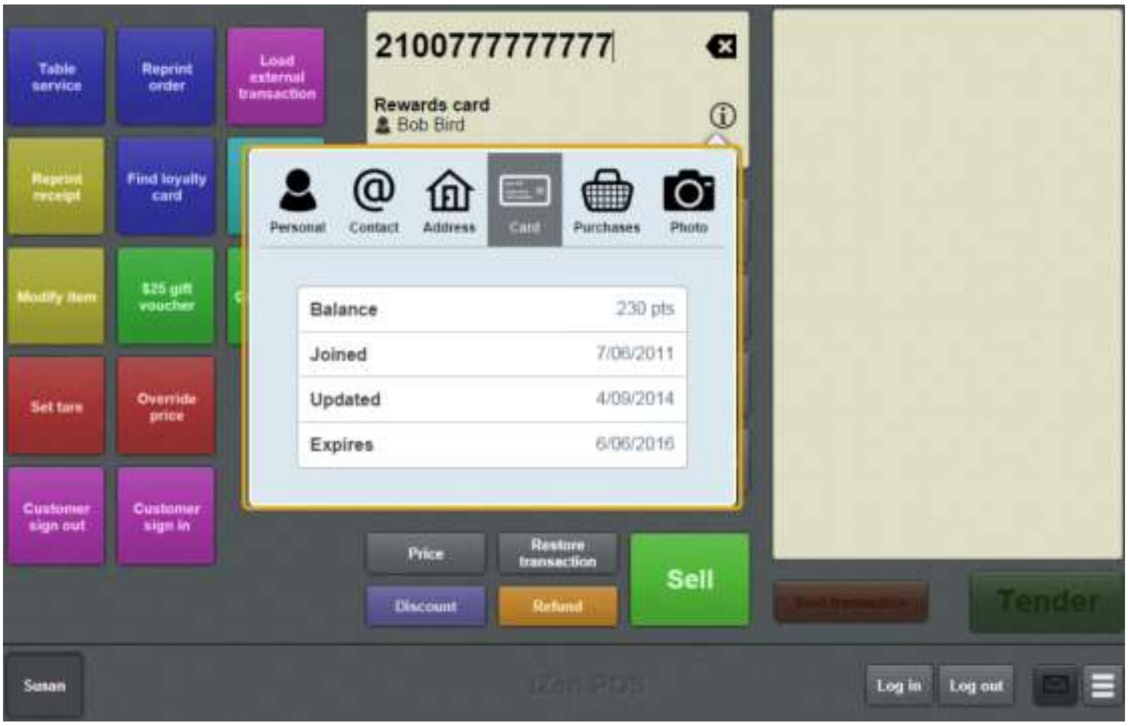
Gender Male

Occupation

See *Loyalty screen* on page 528.

3. Press .

   The Card tab of the Loyalty screen is displayed.



2100777777777

Rewards card

Bob Bird

Balance 230 pts

Joined 7/06/2011

Updated 4/09/2014

Expires 6/06/2016

The customer's loyalty points are displayed in the **Balance** field.

Finding a loyalty card by name

You can search for a loyalty card to view its details or add it to a transaction.

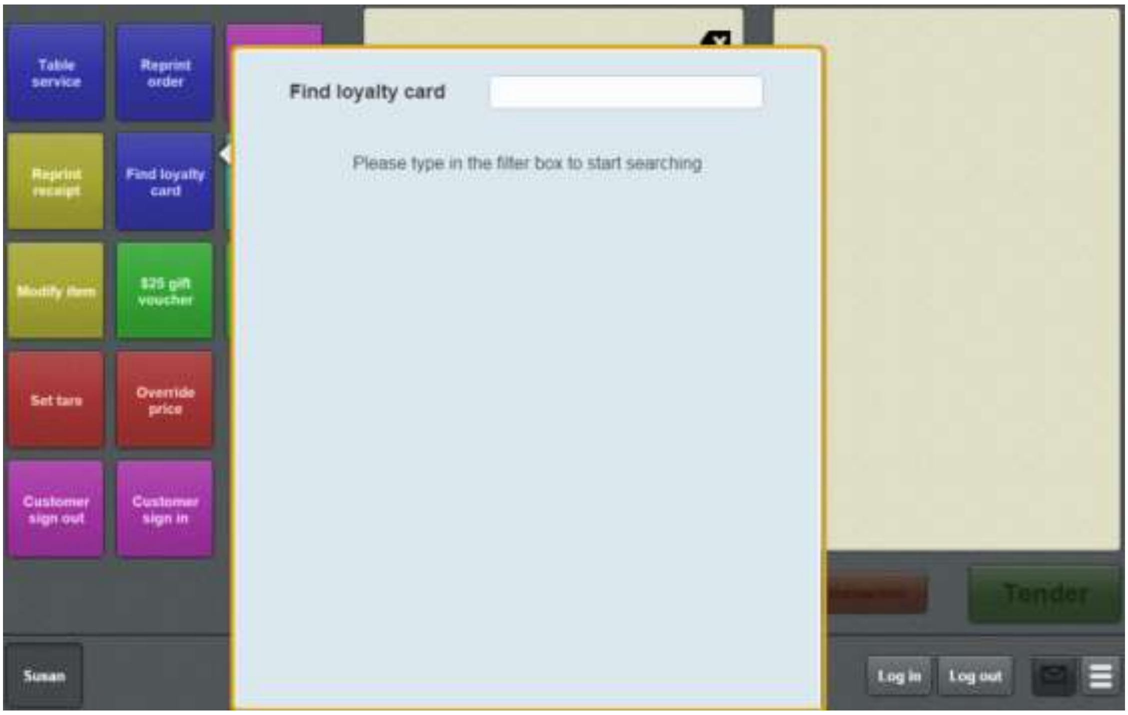
> **Note:** You must have a one-shot button configured to search for loyalty cards by name. Without a one-shot button, you must search for loyalty cards by card number. See *Viewing a customer's details* on page 514. Also see *Creating a one-shot button to find loyalty cards* on page 175.

To find a loyalty card by name:

1. Press the Find loyalty one-shot button.

> **Note:** Your one-shot button configuration may be different from the documentation.

The Find loyalty card screen is displayed.



2. Press the search field.
3. Type either:
    - the first letters of the customer's name
    - the first numbers of the loyalty card number
    - part of the customer's phone number.

   The search results are displayed.

Editing loyalty card details

Edit a loyalty card when you need to update the customer's details.

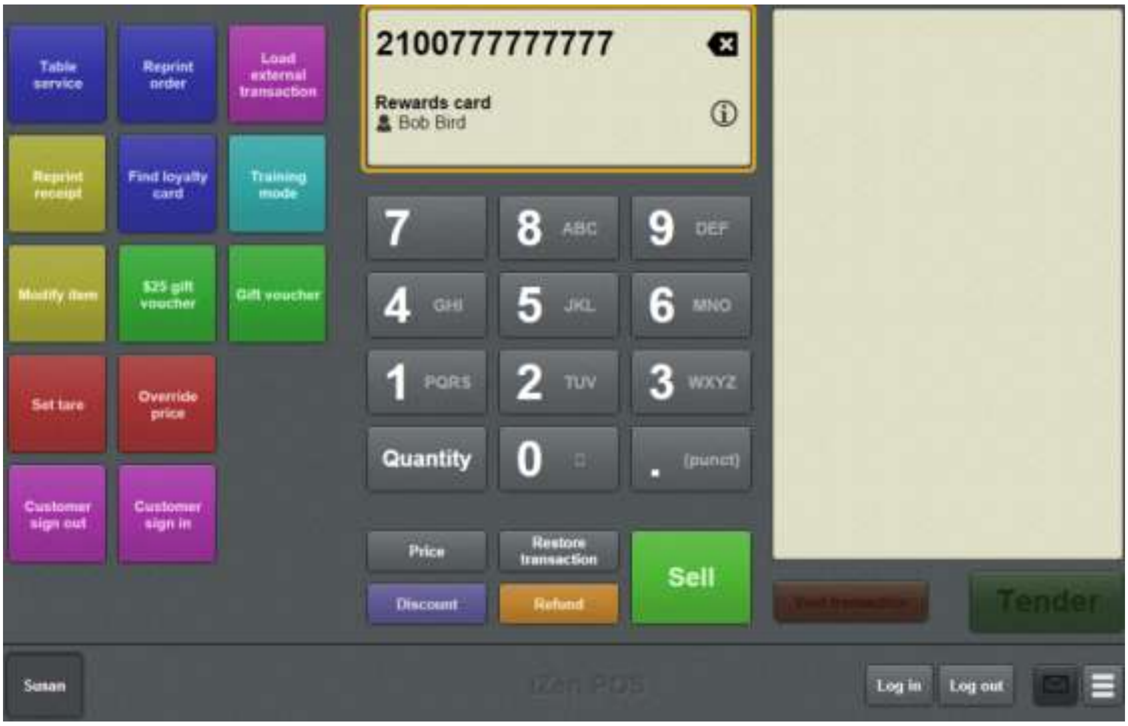
> **Note:** Any changes made to the card details are immediately sent to the Portal when the loyalty screen is closed.

> **Note:** You cannot edit a customer's loyalty points balance or their purchase history.

To edit a loyalty card:

1. Scan or type the loyalty number into the Transaction screen.

   The Item field displays the loyalty card information.



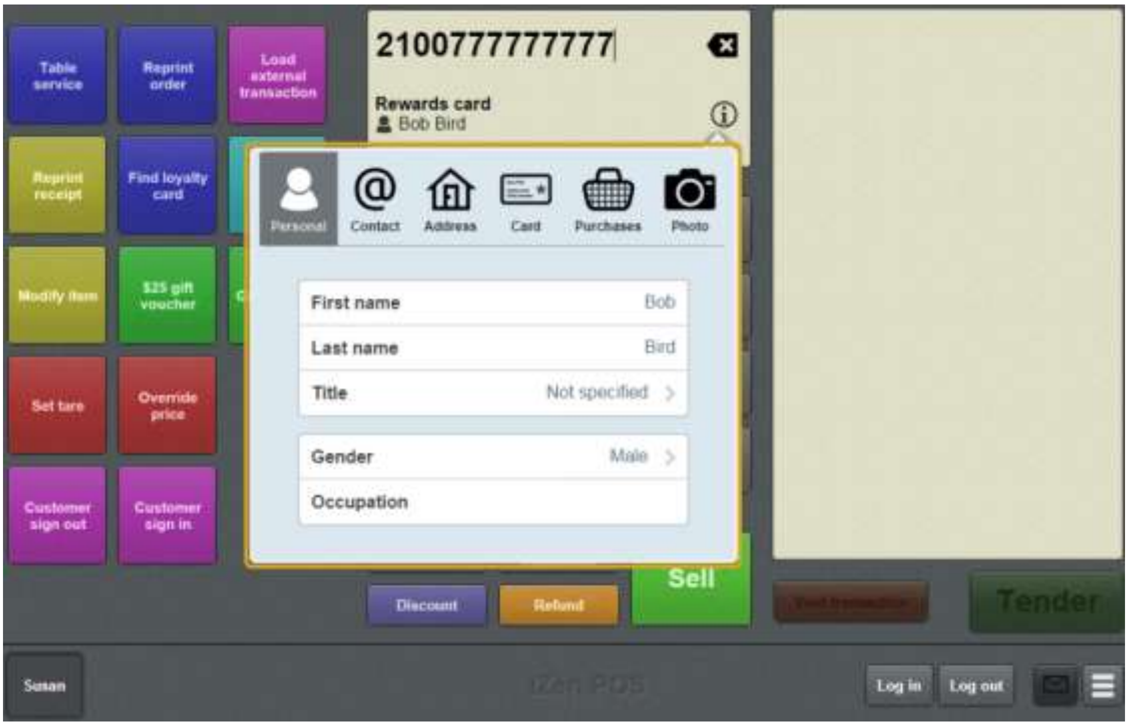
2100777777777

Rewards card

Bob Bird

2. Press ⓘ.

   The Loyalty screen is displayed with the customer's details.



2100777777777

Rewards card
Bob Bird

First name Bob
Last name Bird
Title Not specified
Gender Male
Occupation

See *Loyalty screen* on page 528.

3. Edit the relevant details.
4. Add the card to the transaction.

   See *Adding a loyalty card* on page 444.

5. Continue the transaction as normal.

   See *Selling and refunding items* on page 409.

Updating a customer's photo

Update a customer photo to record a picture of the customer's appearance.

> **Note:** Customer photos can only be updated using a mobile device such as an iPad. If the **Click To Update Photo** option does not display, the device you are using is not capable of updating the customer's photo.

To update a customer photo:

1. Scan or type the loyalty number into the Transaction screen.

   The Item field displays the loyalty card information.

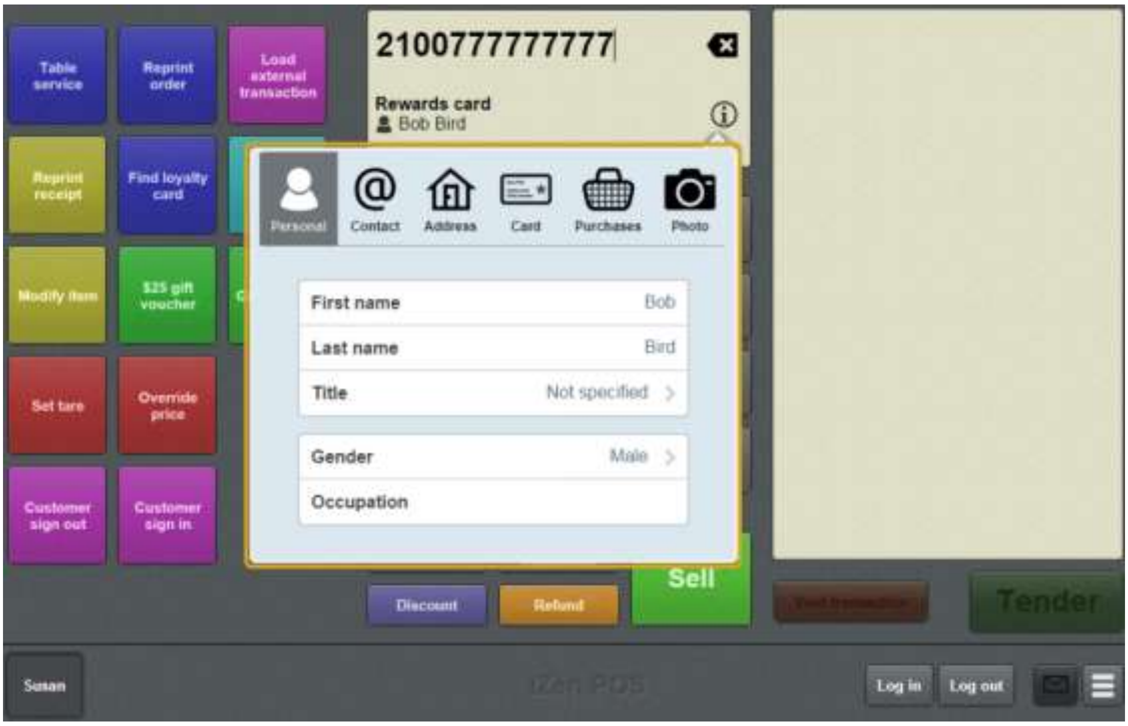
2100777777777

Rewards card

Bob Bird

2. Press ⓘ.

   The Loyalty screen is displayed with the customer's details.



2100777777777

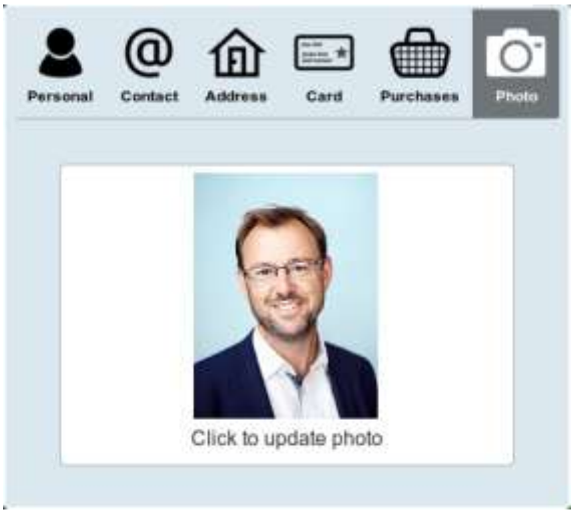
Rewards card
Bob Bird

First name	Bob
Last name	Bird
Title	Not specified
Gender	Male
Occupation	

See *Loyalty screen* on page 528.

3. Press Photo.

   The Photo tab of the Loyalty screen is displayed.



4. Press **Click to update photo**.

   The device's camera mode is enabled.

5. Take a photo of the customer with the device.
6. Continue with the transaction.

   See *Selling and refunding items* on page 409.

   The photo is uploaded to the server when the transaction is finalised.

Signing customers in

You can sign customers in to register their attendance, for example in a workshop or as a club member. The customer must have a loyalty card in order to sign in. You can sign a customer in as part of another transaction, or as a standalone sign-in transaction.

> **Note:** You can only sign customers in using a one-shot button configured to sign customers in. See *Creating a one-shot button to sign a customer in* on page 159.

To sign a customer in:

1. Scan or look up the customer's loyalty card.

   See *Adding a loyalty card* on page 444.

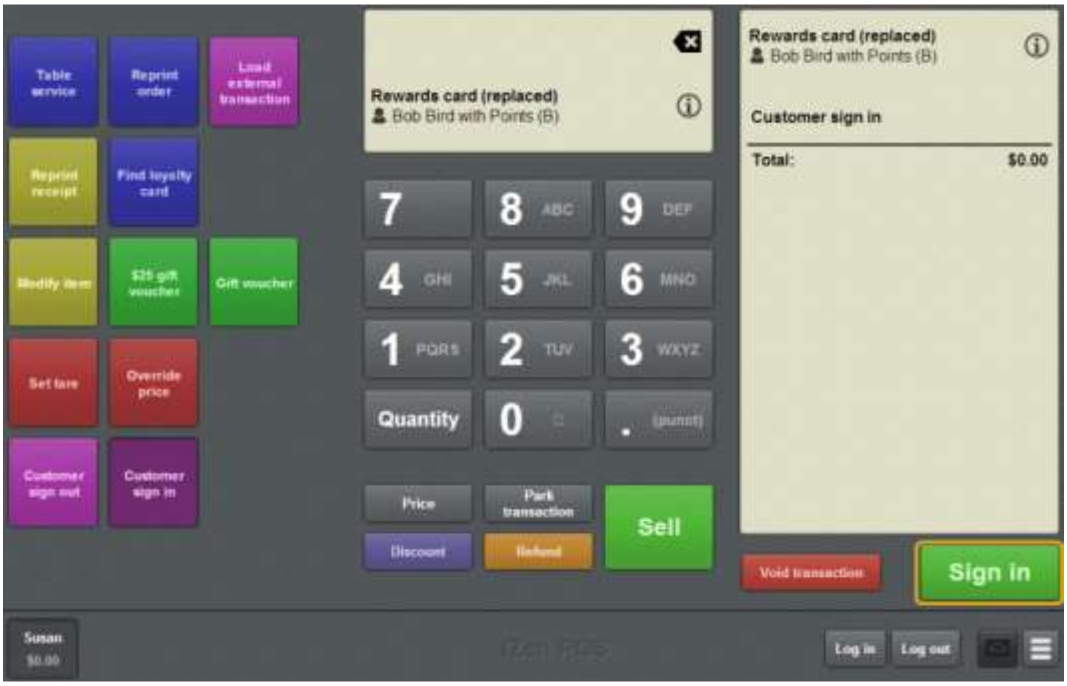
2. Press  to add the loyalty card to the transaction.

2100000000000

Rewards card (replaced)

Bob Bird with Points (B)

3. Press the **Customer sign in** one-shot button.
4. If:
   - You don't want to add other items to the transaction, press .



Rewards card (replaced)
Bob Bird with Points (B)

Customer sign in

Total: $0.00

The customer is signed in.

- If you want to add other items to the transaction, continue the transaction as normal. The customer is signed in when the transaction is finalised.

> **Note:** You cannot add another loyalty card or another customer to this transaction.

See *Selling and refunding items* on page 409.

Signing customers out

You can sign customers out to register the end of their attendance, for example in a workshop or as a club member. A customer must have a loyalty card in order to sign out. You can sign a customer out as part of another transaction, or as a standalone sign-out transaction.

> **Note:** You can only sign customers out using a one-shot button configured to sign customers in. See *Creating a one-shot button to sign a customer out* on page 163.

To sign a customer out:

1. Scan or look up the customer's loyalty card.

   See *Adding a loyalty card* on page 444.

2. Press Sell to add the loyalty card to the transaction.

2100000000000

Rewards card (replaced)
Bob Bird with Points (B)

3. Press the **Customer sign out** one-shot button.
4. If:
   - You don't want to add other items to the transaction, press Sign out.

Rewards card (replaced)
Bob Bird with Points (B)

Rewards card (replaced)
Bob Bird with Points (B)
Customer sign out
Total: $0.00

The customer is signed out.

- If you want to add other items to the transaction, continue the transaction as normal. The customer is signed out when the transaction is finalised.

> **Note:** You cannot add another loyalty card or another customer to this transaction.

See *Selling and refunding items* on page 409.

Loyalty screen

Use the Loyalty screen to:

- View a customer's details.

  See *Viewing a customer's details* on page 514.
- Edit a customer's details.

  See *Editing loyalty card details* on page 520.
- View a customer's loyalty points balance.

  See *Viewing a loyalty balance* on page 516.
- View a customer's photo.
- Update a customer's photo.

  See *Updating a customer's photo* on page 522.

> **Note:** Photos can only be updated using the Point of Sale on an iPad.

Opening the Loyalty screen

To open the Loyalty screen:

1. Scan or type the loyalty number into the Transaction screen.

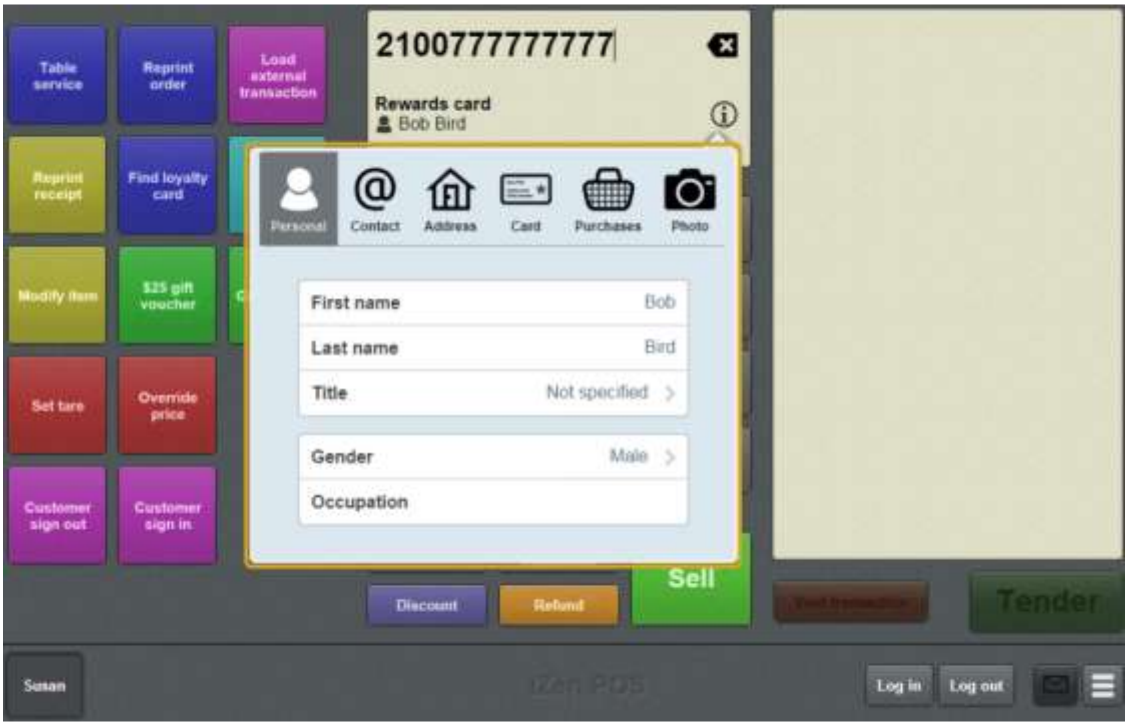
   The Item field displays the loyalty card information.

2100777777777

Rewards card
Bob Bird

2. Press ⓘ.

   The Loyalty screen is displayed with the customer's details.



2100777777777

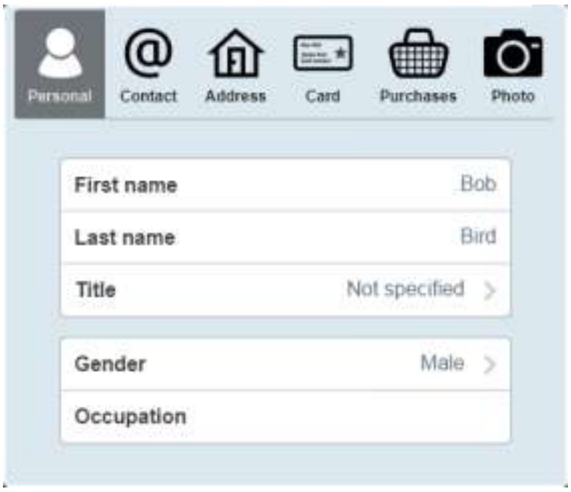
Rewards card
Bob Bird

First name	Bob
Last name	Bird
Title	Not specified
Gender	Male
Occupation	

Note: The Point of Sale opens whichever tab you last viewed on the Loyalty screen.

Loyalty window key fields and buttons

Personal tab



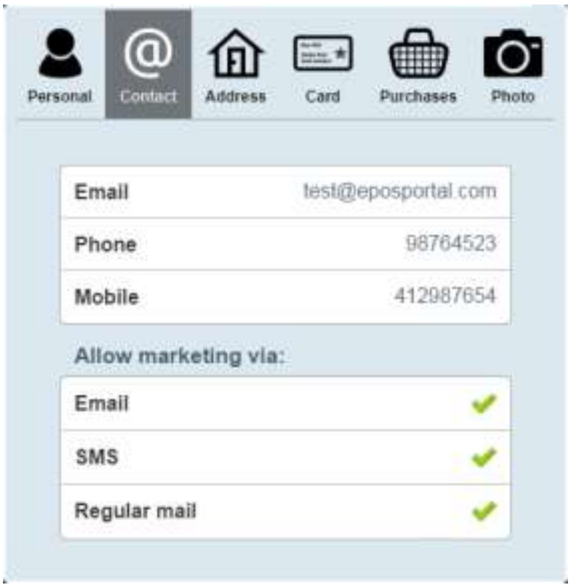
First name Bob
Last name Bird
Title Not specified
Gender Male
Occupation

The Personal tab records a customer's name and pertinent details for advertising or promotions, such as their gender and occupation.

Note: Depending on your Portal configuration, some fields may be mandatory.

Field	Description
First name	The customer's first name.
Last name	The customer's last name.
Title	The salutation or title the customer prefers. For example, Dr, Mr, Miss, Ms.
Gender	The customer's gender.
Occupation	The customer's occupation.

Contact tab



Email test@eposportal.com
Phone 98764523
Mobile 412987654
Allow marketing via:
Email ✓
SMS ✓
Regular mail ✓

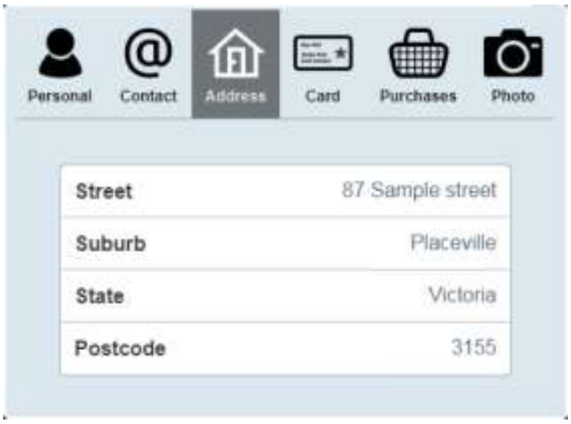
The Contact tab records a customer's contact information for advertising and promotions.

> **Note:** Depending on your Portal configuration, some fields may be mandatory.

Field	Description
Email	The customer's email address.
Phone	The customer's business or landline phone number.
Mobile	The customer's mobile phone number.
Allow marketing via: Email	Select (✓) if the customer wants to receive information or promotions via the email address recorded in the **Email** field above.
Allow marketing via: SMS	Select (✓) if the customer wants to receive information or promotions via the mobile phone number recorded in the **Mobile** field above.

Field	Description
Allow marketing via: Regular mail	Select (✓) if the customer wants to receive information or promotions via the address recorded in the Address tab.

Address tab



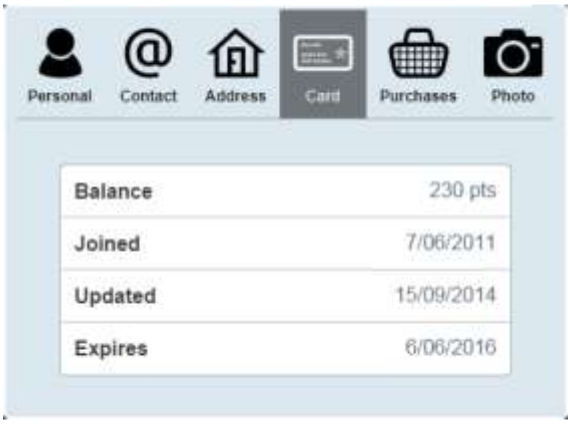
Street	87 Sample street
Suburb	Placeville
State	Victoria
Postcode	3155

The Address tab records the customer's home or postal address, where the customer wants to receive promotional mailouts.

Note: Depending on your Portal configuration, some fields may be mandatory.

Field	Description
Street	The unit number, street number and street name of the address. For example: Unit 23b, 123 Mountainview Street.
Suburb	The suburb or town of the address.
State	The state or territory of the address.
Postcode	The postcode or zipcode of the address.

Card tab

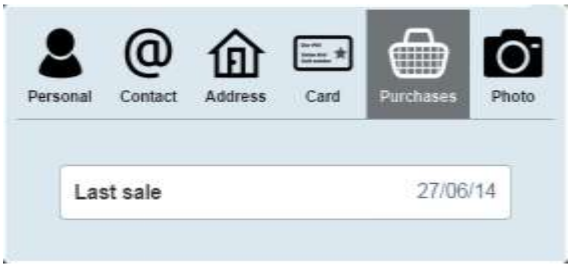


Balance	230 pts
Joined	7/06/2011
Updated	15/09/2014
Expires	6/06/2016

The Card tab records the customer's card details, including their loyalty points balance.

Field	Description
Balance	The number of loyalty points the customer currently has.
Joined	The date this loyalty card was created.
Updated	The date the customer's details were last updated.
Expires	The date the loyalty card expires.

Purchases tab

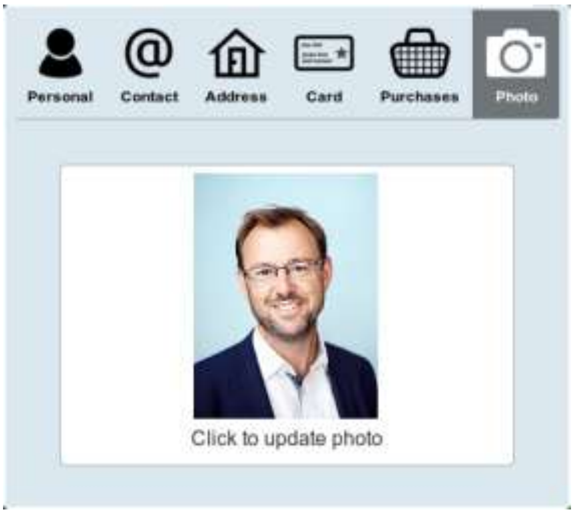


Last sale 27/06/14

The Purchases tab records information about the customer's purchase history.

Field	Description
Last sale	The date the customer last made a transaction linked to this card.

Photo tab



The Photo tab displays a customer photo, if one has been uploaded.

Field	Description
Click to update photo	Press to open the iPad's camera app and take a photo to update the customer photo. **Note:** The update photo function is only available on iPads.

Managing customer orders and laybys

Customer orders

You can create customer orders for when a customer wants a specific set of items to be delivered or collected on a specified date. You can create, add payments for, duplicate and collect customer orders via the Point of Sale.

See *Processing customer orders* on page 539.

Laybys

You can create laybys for when customers want to reserve something for purchase, but cannot pay the full amount on that day. Laybys have a date by which the balance must be paid for in full, or the customer forfeits the layby.

Laybys can be created and paid for through the Point of Sale. Layby collection is not recorded in the Point of Sale. Laybys can only be edited or cancelled through the Portal.

Key concepts

Complete order

Customer

Customer order

Deposit

Discount

Finalise

Fulfilled order

Item

One-shot button

Open order

Point of Sale

Portal

Quantity

Refund

Transaction

Also see:

- *Find customer or debtor screen* on page 568.
- *Customer orders screen* on page 570.
- *Order details screen* on page 573.
- *Print invoice screen* on page 579.
- *Layby details screen* on page 581.

What you can do:

- *Finding a customer* on page 541.
- *Creating a customer order* on page 543.
- *Finding an order* on page 547.
- *Adding a payment to a customer order* on page 550.
- *Completing a customer order* on page 552.

- *Duplicating a customer order* on page 554.
- *Printing an invoice* on page 557.
- *Creating a layby* on page 559
- *Finding an layby* on page 563.
- *Paying a layby* on page 565.
- *Cancelling a layby* on page 567.

Processing customer orders

Customer orders allow customers to request specific quantities of items, pay a deposit, and collect those items at a later date or have them delivered. Customer orders are managed both through the Point of Sale and the Portal.

To process an order from creation to collection or delivery on the Point of Sale:

1. Create the order for the customer

   See *Creating a customer order* on page 543.

2. The transaction containing the order is finalised and the customer pays a deposit for the order.
3. The order is sent to the Portal with a status of **Open**.

   The order has:

   - An optional delivery fee.
   - A deposit that has been paid.
   - The customer's details.
   - The items and quantities requested.
   - A delivery date.

   > **Note:** A minimum deposit and default delivery fee can be configured in the Terminal setup screen. See *Setting up laybys on the Point of Sale* on page 26.

4. The order is fulfilled via the Portal as the correct quantities of items are allocated to the customer.

   > **Note:** Orders must be fulfilled via the Portal. They cannot be fulfilled via the Point of Sale.

   The order has a status of **Fulfilled**.

   > **Note:** The quantities of items in the order may change in the delivery process. The order's total price reflects the actual quantity being delivered to the customer.

5. The customer may add payments to their order to reduce the balanced owed.

   See *Adding a payment to a customer order* on page 550.

6. Either:

   - The customer collects their order at your site and pays the order total, less the deposit and any other payments, via the Point of Sale.
   - The order is delivered and marked complete via the Portal.

The order has a status of **Complete**.

Finding a customer

You need to find a customer if you want to:

- Assign a customer to an order.

  See *Creating a customer order* on page 543.

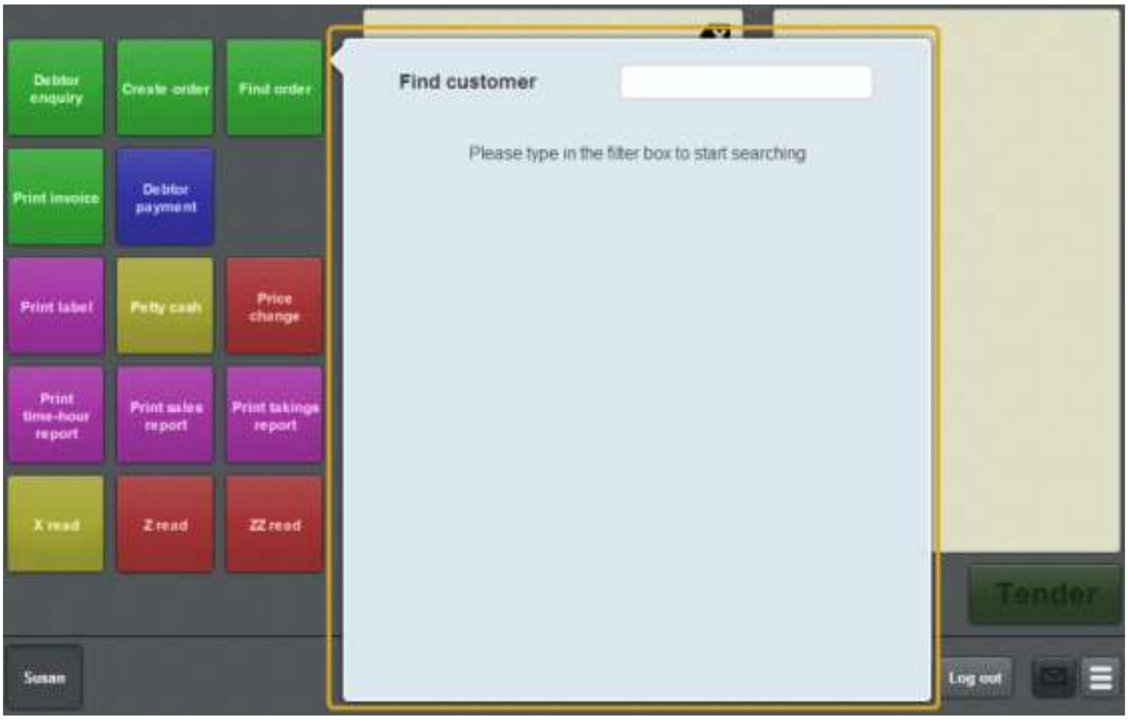
- View or open a customer's order.

  See *Finding an order* on page 547.

> **Note:** Some of these tasks require you to find the customer at the start of the task, while others prompt you to find the customer near the end of the task. In either case, the procedure for finding the customer using the Find customer screen is the same.

To find a customer in the Find customer screen:

1. The Find customer screen is displayed.

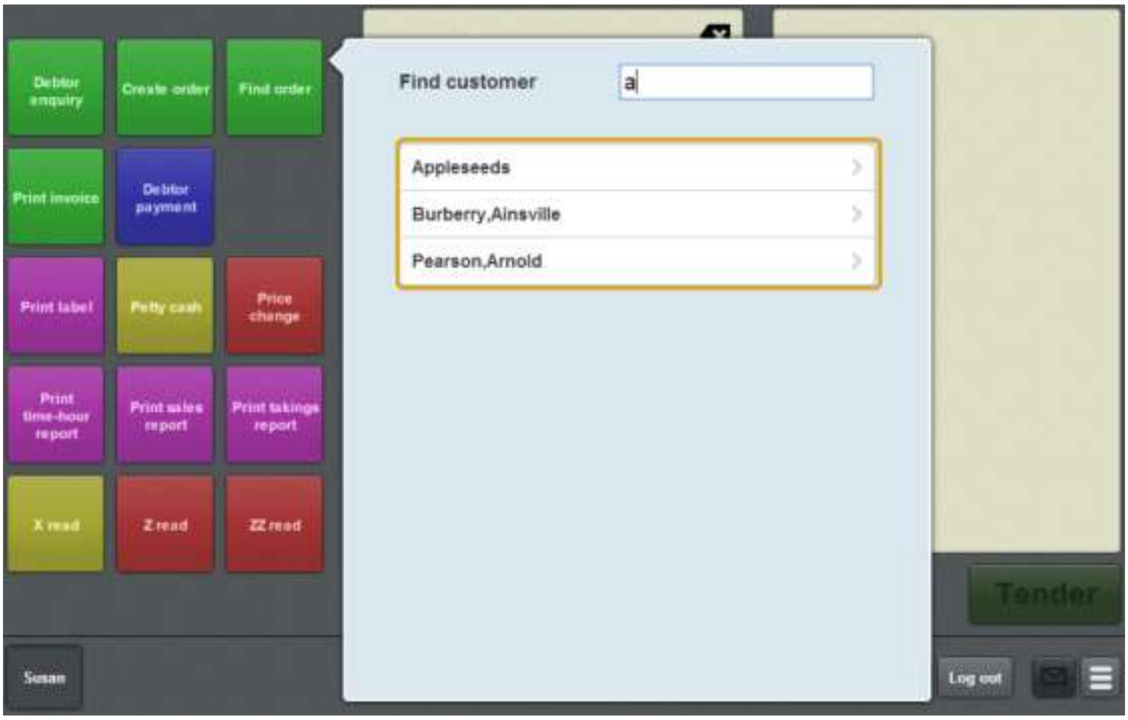


Please type in the filter box to start searching

2. Press the search field.
3. Type in a few letters of the customer's first or last name.

> **Note:** The customer search matches any contiguous part of the customer name. For example, if the customer name is Appleseeds, the customer search matches **APP**, **PLE** or **SEE** but not **APS**

The search results are displayed.



Find customer: a

Appleseeds

Burberry,Ainsville

Pearson,Arnold

4. Press the name of the relevant customer.

   The customer is selected, and you can continue your task.

Creating a customer order

Create an order when a customer wants to purchase a specific quantity of items to be collected or delivered on a specified date.

> **Note:** Orders cannot be edited on the Point of Sale once created. To edit an order, use the Portal.

> **Note:** Orders are only created once the transaction containing the order deposit is finalised.

> **Note:** Orders can only be created using a one-shot button. See *Creating a one-shot button to create orders* on page 151.

To create a customer order:

1. Press the Create order one-shot button.

   The Transaction screen displays the Customer order mode.

> **Note:** You cannot create an order from an existing transaction. If your transaction already contains items, either park or void the transaction before you start to create the order. Once you have created the order, you can add other items to the transaction with the deposit.

2. Search for items to add to the customer order.

See *Finding an item* on page 411

3. Select the item.
4. Press Quantity.

> **Note:** You must select the quantity, even if the item is normally sold by weight.

> **Tip:** If you need to correct the quantity, you can select the item and press Quantity again. See *Changing an item's quantity* on page 429.

5. Type in the number of units or the weight of the item the customer wants to order.
6. Press Add.

   The item is added to the order.

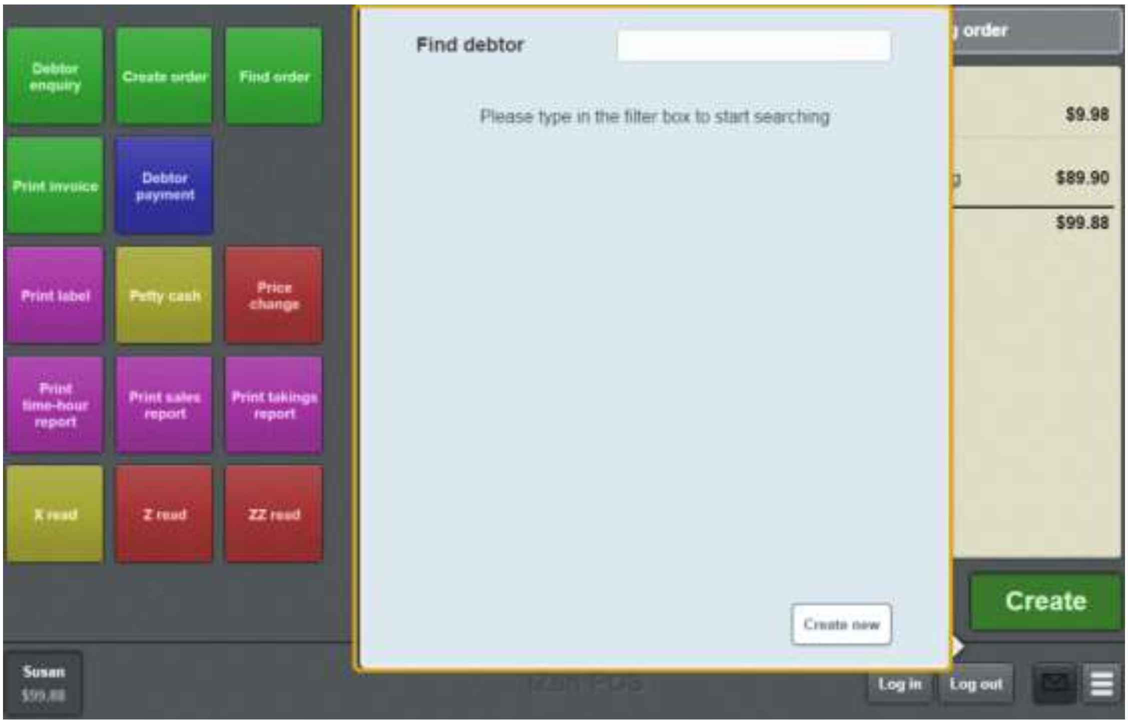
> **Note:** You can set discounts and price overrides on items in a customer order using one-shot buttons configured for discounts and price overrides. See *Creating a one-shot button to override an item price* on page 216. Also see *Creating a one-shot button to set a discount* on page 208.

7. Search for any additional items the customer wants to order.

> **Note:** Gift vouchers, refunded items and loyalty cards cannot be added to customer orders.

8. Press Create.

   The Find customer screen is displayed.

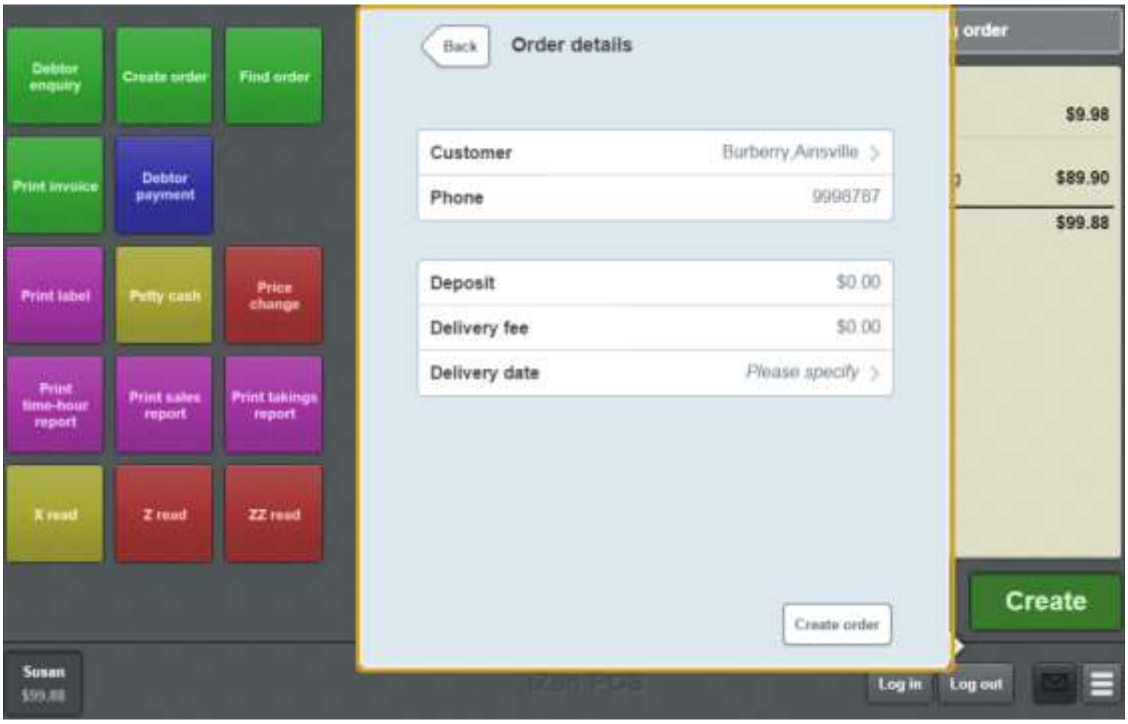


Please type in the filter box to start searching

9. Search for the customer you are creating the order for.

   See *Finding a customer* on page 541.

   The Order details screen is displayed.

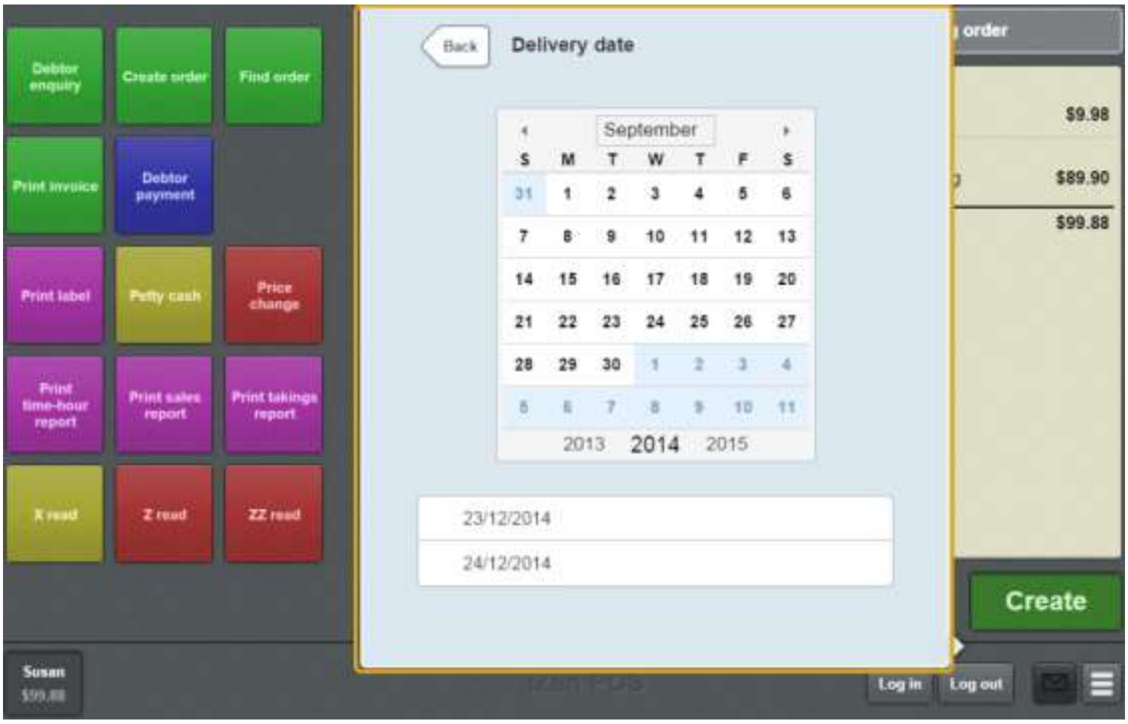


Customer Burberry,Ainsville
Phone 9998787
Deposit $0.00
Delivery fee $0.00
Delivery date Please specify

   See *Order details screen* on page 573

10. Update the **Deposit** and **Delivery fee** amounts, if required.
11. Press **Delivery date**.

The Delivery date screen is displayed.



23/12/2014

24/12/2014

12. Select a date by either:
    - Navigating through the calendar.
    - Pressing one of the pre-set dates.
13. Press Create order.

    The deposit is added to the transaction.

> **Note:** The order is not created on the Portal until this transaction has been finalised. If you void the transaction or the deposit, the order is cancelled.

14. Continue the transaction as normal.

    See *Selling and refunding items* on page 409.

Finding an order

Find an order if you want to:

- View the details of the customer order.

  See *Order details screen* on page 573.

- Duplicate the order.

  See *Duplicating a customer order* on page 554.

- Mark the order as completed.

  See *Completing a customer order* on page 552.

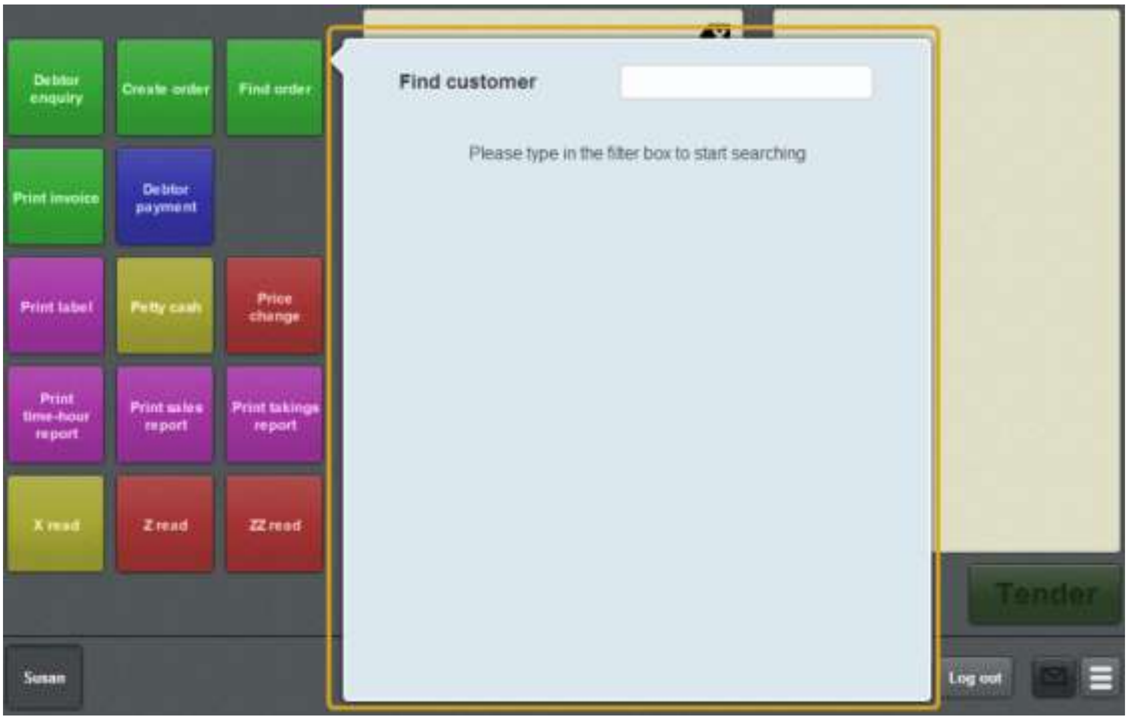
> **Note:** You can only search for orders via a one-shot button. See *Creating a one-shot button to find orders* on page 179.

To find an order:

1. Press the Find order one-shot button.

   > **Note:** Your one-shot button configuration may appear different to the documentation.

   The Find customer screen is displayed.



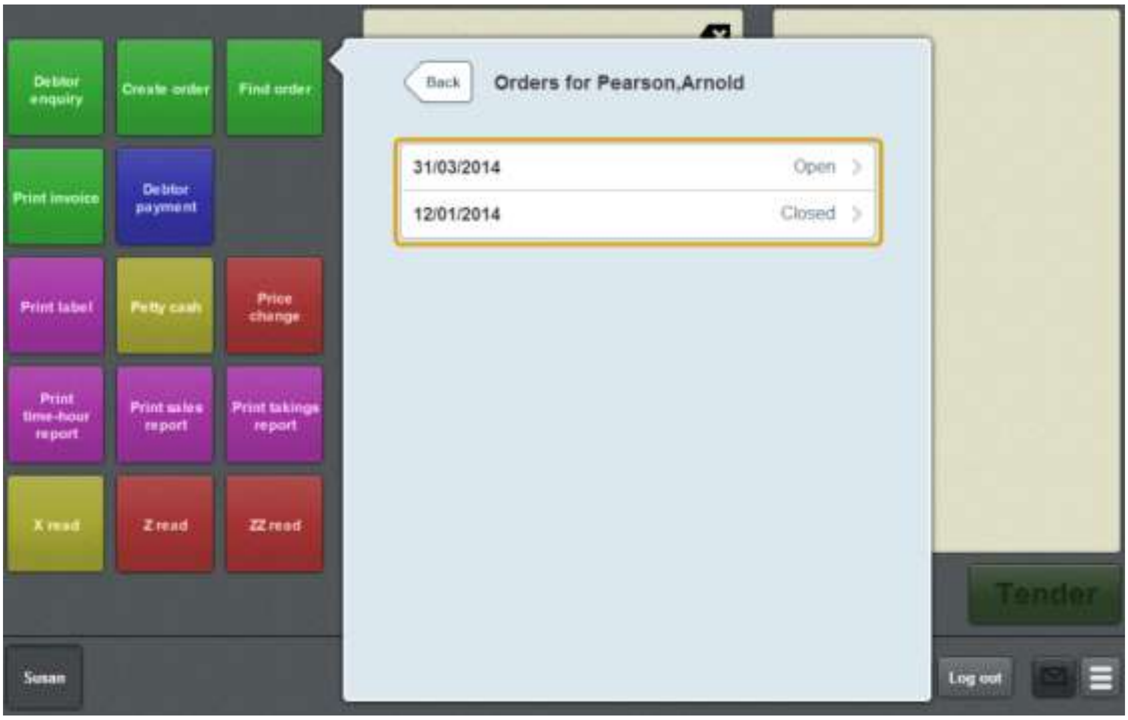
Please type in the filter box to start searching

2. Search for the customer whose order it is.

   See *Finding a customer* on page 541.

Note: Only customers with open orders are displayed.

The Orders for customer screen is displayed.



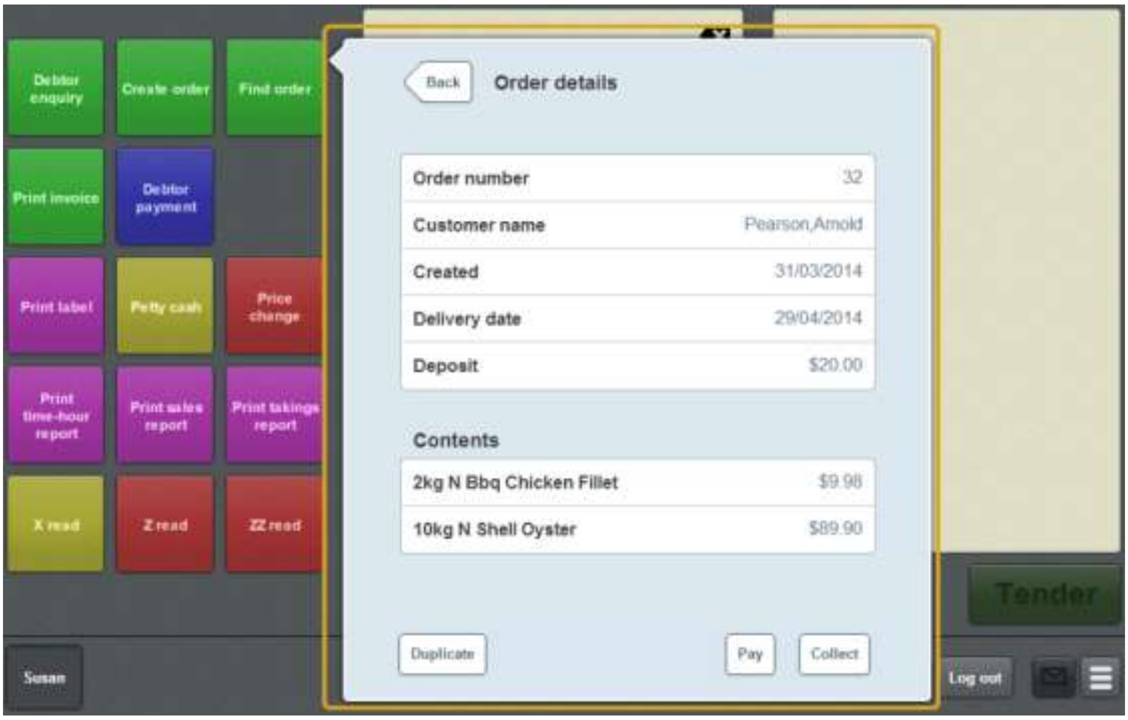
Orders for Pearson,Arnold

31/03/2014	Open
12/01/2014	Closed

See *Customer orders screen* on page 570.

3. Press the order you want to view.

   The Order details screen is displayed.



Order details

Order number	32
Customer name	Pearson,Arnold
Created	31/03/2014
Delivery date	29/04/2014
Deposit	$20.00

Contents

2kg N Bbq Chicken Fillet	$9.98
10kg N Shell Oyster	$89.90

See *Order details screen* on page 573.

Adding a payment to a customer order

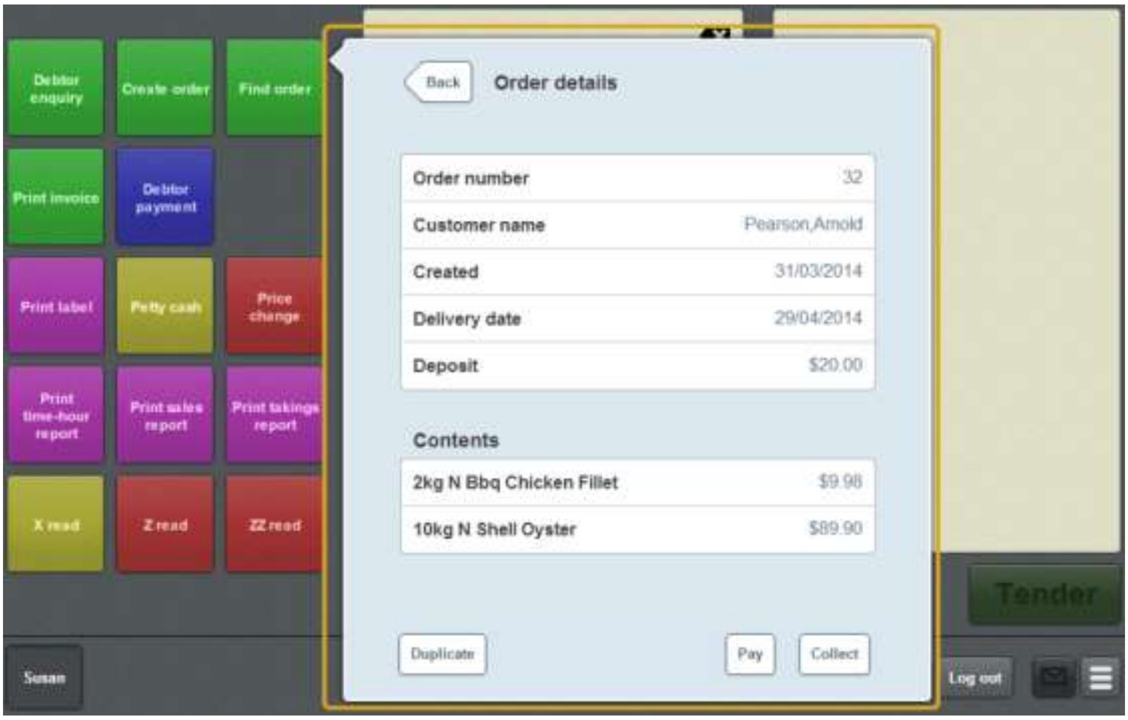
Add a payment to a customer order if the customer wants to pay some or all of the balance owing on their order. Customers cannot pay more than is owed on their order.

To add a payment to a customer order:

1. Find the customer order.

   See *Finding an order* on page 547.

2. The Order details screen is displayed.



Order details

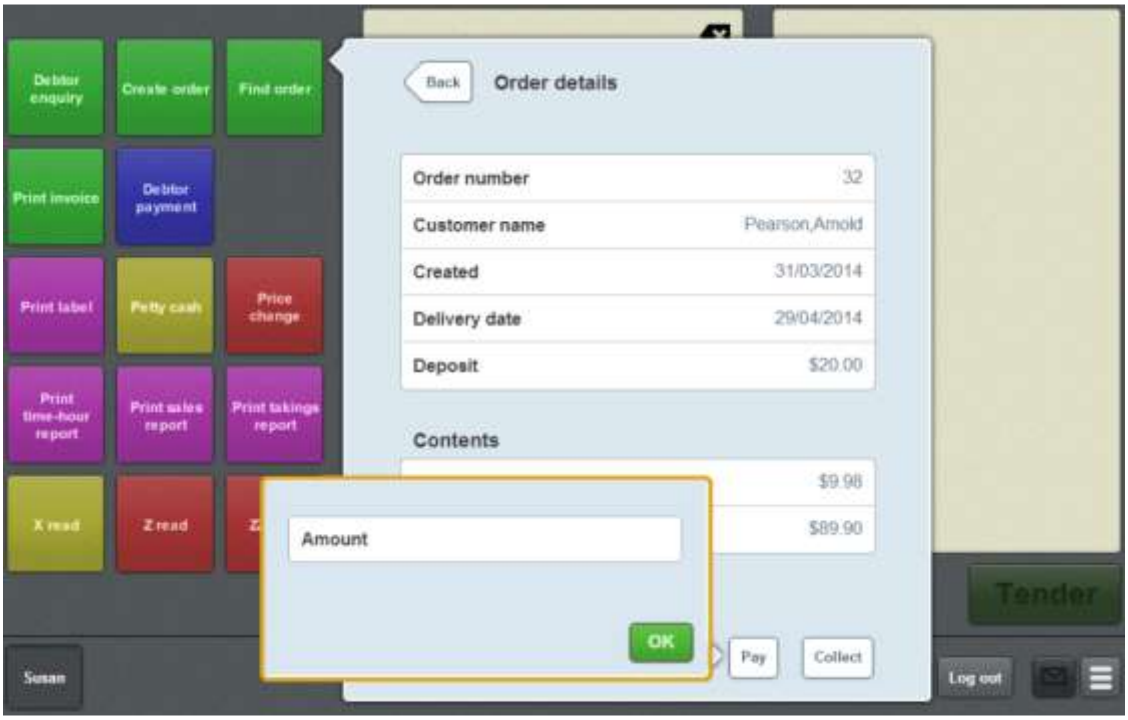
Order number	32
Customer name	Pearson,Arnold
Created	31/03/2014
Delivery date	29/04/2014
Deposit	$20.00

Contents

2kg N Bbq Chicken Fillet	$9.98
10kg N Shell Oyster	$89.90

3. Press Pay.

   A popup screen is displayed.



Order number 32
Customer name Pearson,Arnold
Created 31/03/2014
Delivery date 29/04/2014
Deposit $20.00

$9.98
$89.90

Amount

4. Type the amount the customer wants to pay into the Amount field.
5. Press OK.

   The payment is added to the transaction.
6. Continue the transaction as normal.

   See *Selling and refunding items* on page 409.

Completing a customer order

Complete a customer order when it has been fulfilled and the customer is collecting it from your site.

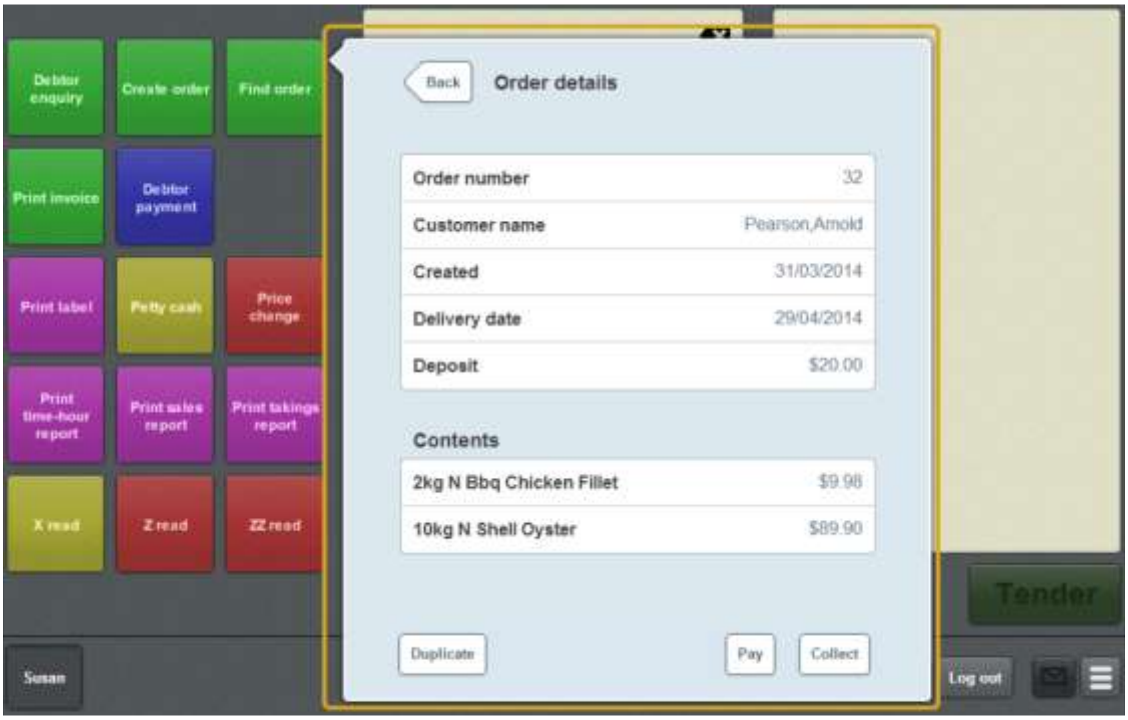
Note: When an order is fulfilled on the Portal, the order's listed item weights or quantities are changed to reflect the actual quantity added to the order. This may affect the total price of the order on collection. If an order is collected before it has been fulfilled on the Portal, the Point of Sale uses the original requested quantities exactly.

To complete an order:

1. Find the customer order you want to complete.

   See *Finding an order* on page 547.

   The Order details screen is displayed.



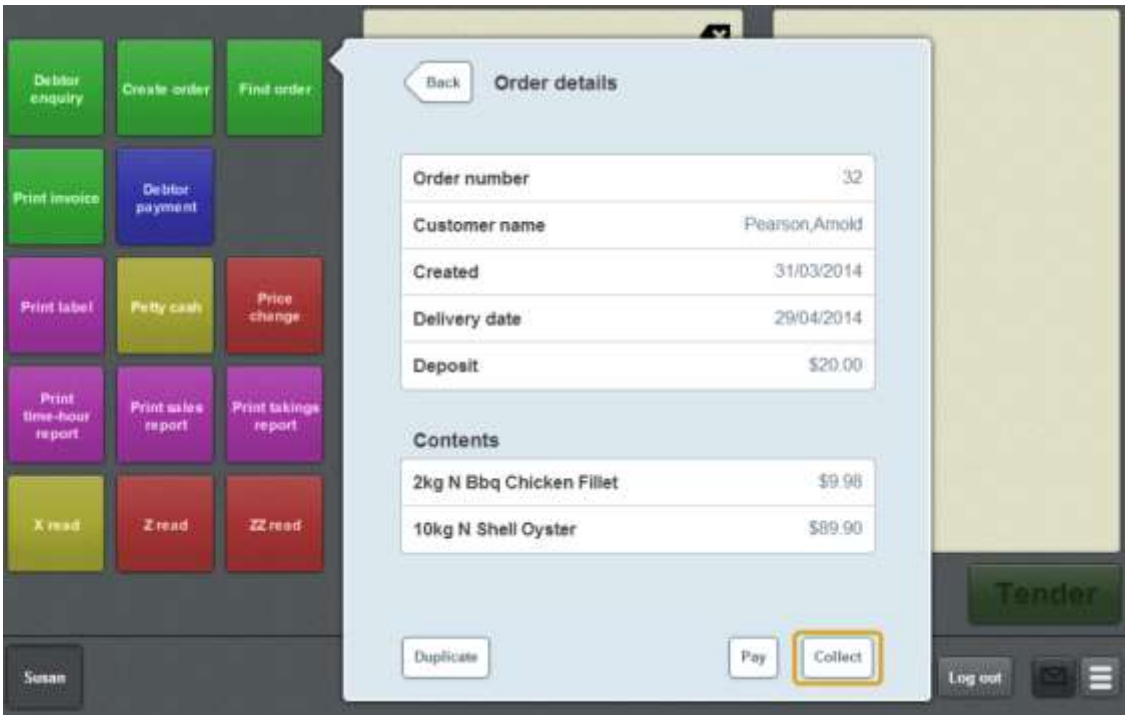
Order details

Order number	32
Customer name	Pearson,Arnold
Created	31/03/2014
Delivery date	29/04/2014
Deposit	$20.00

Contents

2kg N Bbq Chicken Fillet	$9.98
10kg N Shell Oyster	$89.90

2. Press Collect.



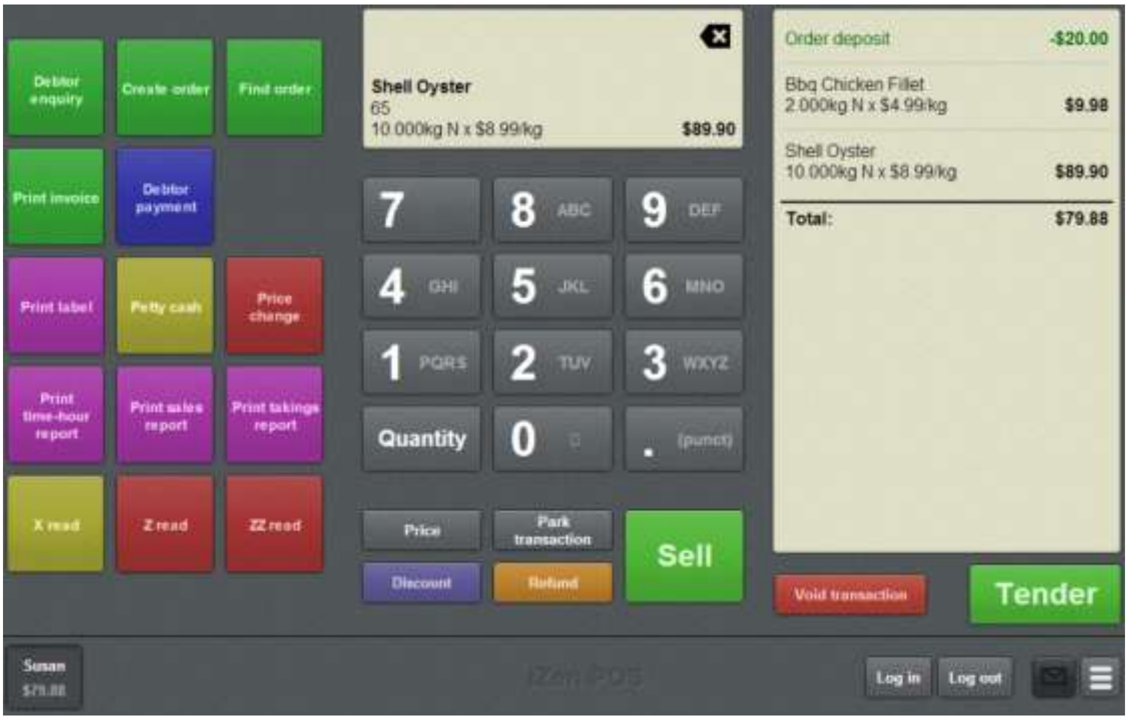
Order details

Order number	32
Customer name	Pearson,Arnold
Created	31/03/2014
Delivery date	29/04/2014
Deposit	$20.00

Contents

2kg N Bbq Chicken Fillet	$9.98
10kg N Shell Oyster	$89.90

The order is added to the transaction.



Shell Oyster
65
10.000kg N x $8.99/kg $89.90

Order deposit	-$20.00
Bbq Chicken Fillet 2.000kg N x $4.99/kg	$9.98
Shell Oyster 10.000kg N x $8.99/kg	$89.90
Total:	$79.88

> **Note:** The amount owed for the order is automatically added to the transaction. If the customer has already paid more than the amount owed, a refund is added to the transaction.

3. Continue the transaction as normal.

   See *Selling and refunding items* on page 409.

Duplicating a customer order

Duplicate a customer order if the customer wants to repeat an existing order with the exact items and quantities as the original order.

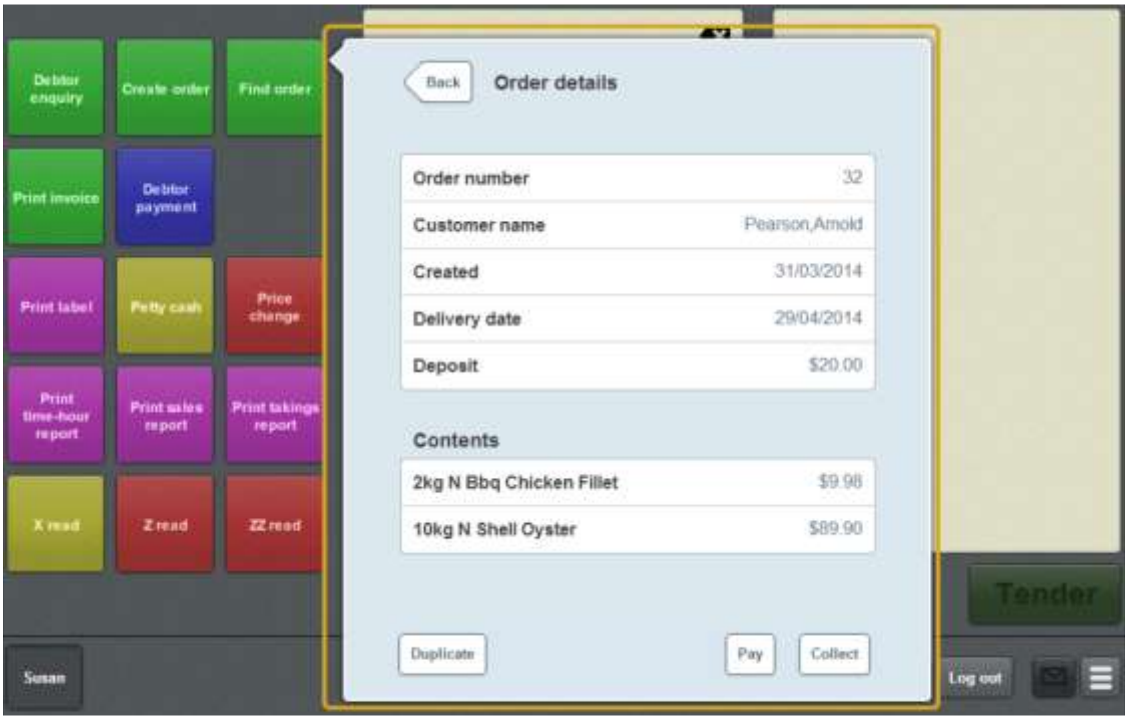
> **Note:** You cannot edit a duplicated order. If the customer wants to make any changes, you must create the order in full. See *Creating a customer order* on page 543.

To duplicate a customer order:

1. Find the customer order you want to duplicate.

   See *Finding an order* on page 547.

   The Order details screen is displayed.

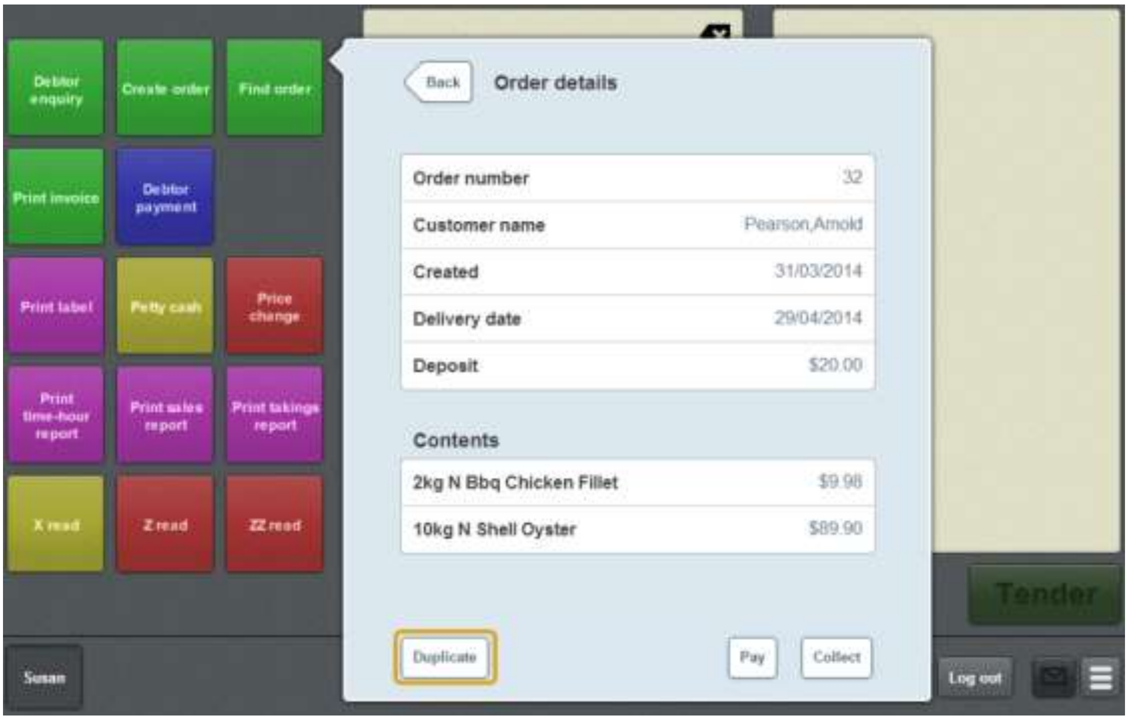


Order number	32
Customer name	Pearson,Arnold
Created	31/03/2014
Delivery date	29/04/2014
Deposit	$20.00

Contents

2kg N Bbq Chicken Fillet	$9.98
10kg N Shell Oyster	$89.90

2. Press Duplicate.



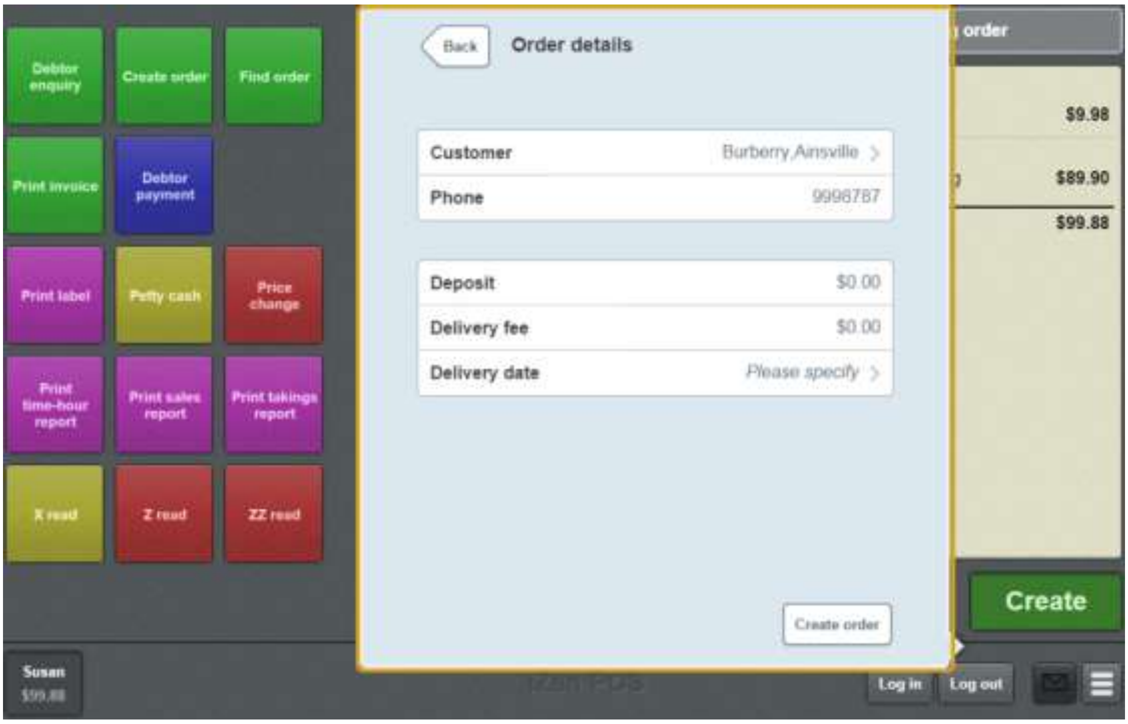
Order details

Order number	32
Customer name	Pearson,Arnold
Created	31/03/2014
Delivery date	29/04/2014
Deposit	$20.00

Contents

2kg N Bbq Chicken Fillet	$9.98
10kg N Shell Oyster	$89.90

The Order details screen for the new order is displayed.



Order details

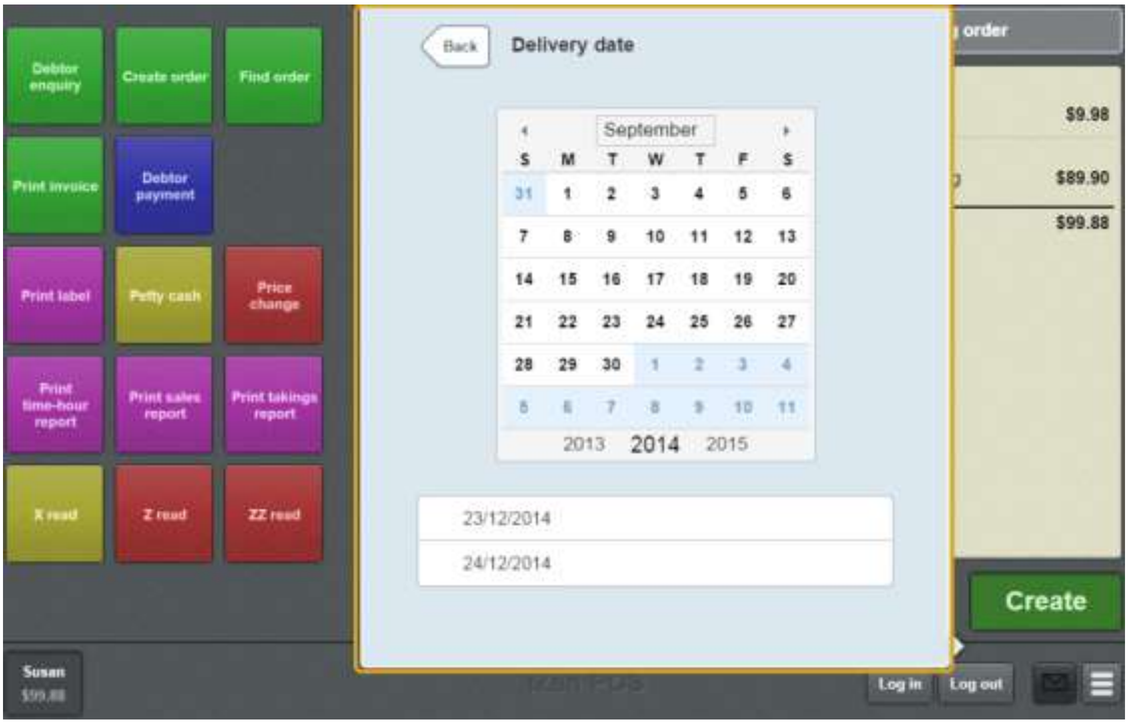
Customer	Burberry,Ainsville
Phone	9998787

Deposit	$0.00
Delivery fee	$0.00
Delivery date	Please specify

See *Order details screen* on page 573.

3. Update the **Deposit** and **Delivery fee** amounts, if required.
4. Press **Delivery date**.

   The Delivery date screen is displayed.



5. Select a date by either:
    - Navigating through the calendar.
    - Pressing one of the pre-set dates.
6. Press Create order.

    The deposit is added to the transaction.

> **Note:** The order is not created on the Portal until this transaction has been finalised. If you void the transaction or the deposit, the order is cancelled.

7. Continue the transaction as normal.

    See *Selling and refunding items* on page 409.

Printing an invoice

You can add a customer's details to a receipt to convert it into an invoice before a transaction is finalised.

> **Note:** You can request an invoice at any point in the transaction until the transaction has been finalised. You cannot print an invoice for a transaction that has been finalised.

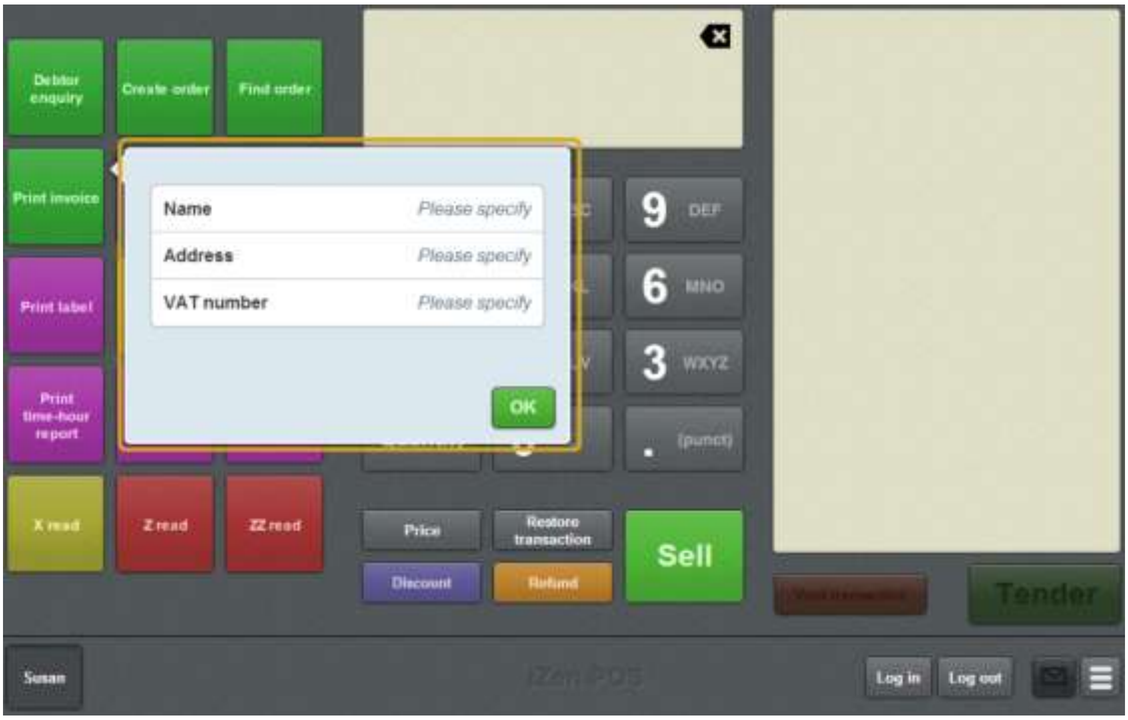
> **Note:** You must have a one-shot button configured to print a customer invoice. See *Creating a one-shot button to print invoices* on page 241.

To print a customer invoice:

1. Press the **Print invoice** one-shot button.

   > **Note:** Your one-shot button configuration may be different to the documentation.

The Print invoice screen is displayed.



Name: Please specify
Address: Please specify
VAT number: Please specify

2. Type in the customer **Name**, **Address** and the customer's **VAT number**.
3. Press OK.

   The customer details are printed on the receipt when the transaction is finalised.
4. Continue the transaction as normal.

   See *Selling and refunding items* on page 409.

Creating a layby

Create a layby if a customer wants to reserve items for purchase and complete the purchase at a later date.

> **Note:** Laybys must be created from an empty transaction. If you want to create a layby from an existing transaction, you must void the transaction and re-scan the items into the layby transaction.

To create a layby:

1. Press the **Create Layby** one-shot button.

   The layby is opened.

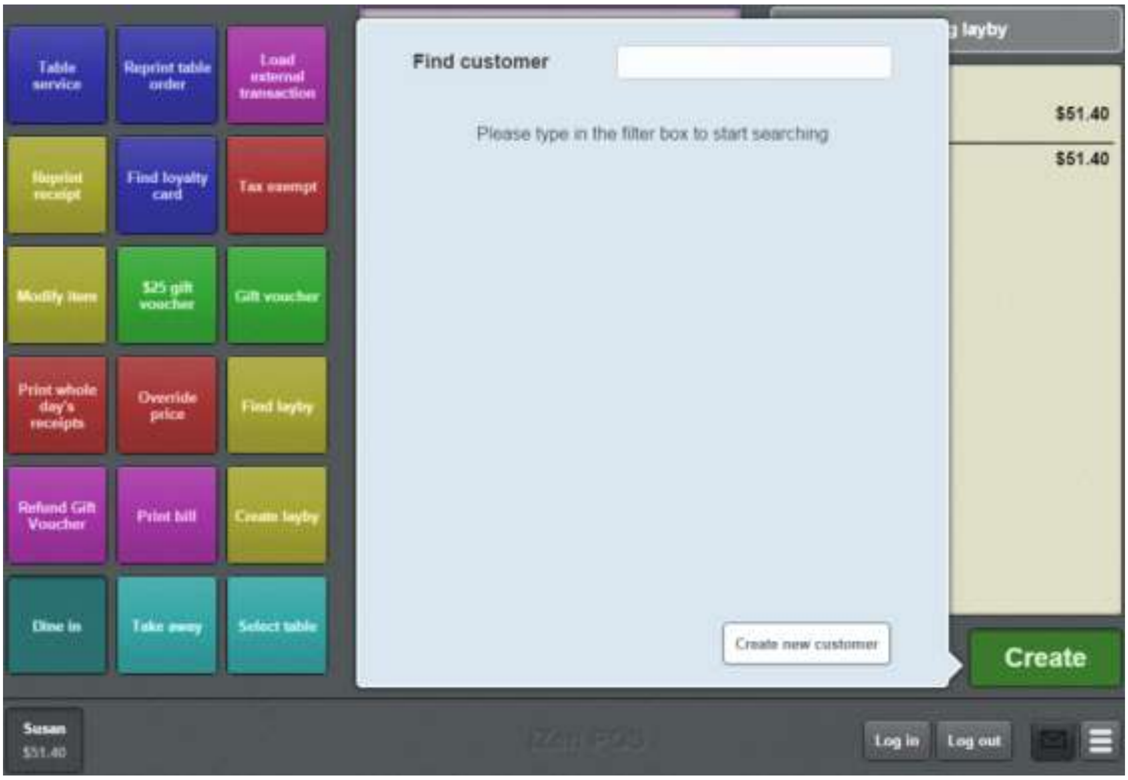
2. Add the items to the layby.

   See *Selling and refunding items* on page 409.

3. When you are finished, press Create.

> **Note:** You cannot add or remove items from the layby once it has been created. If you add or remove items in the transaction after the layby is created, the items are added to the regular transaction to be paid for in full, not added to the layby.

The Find customer screen is displayed.

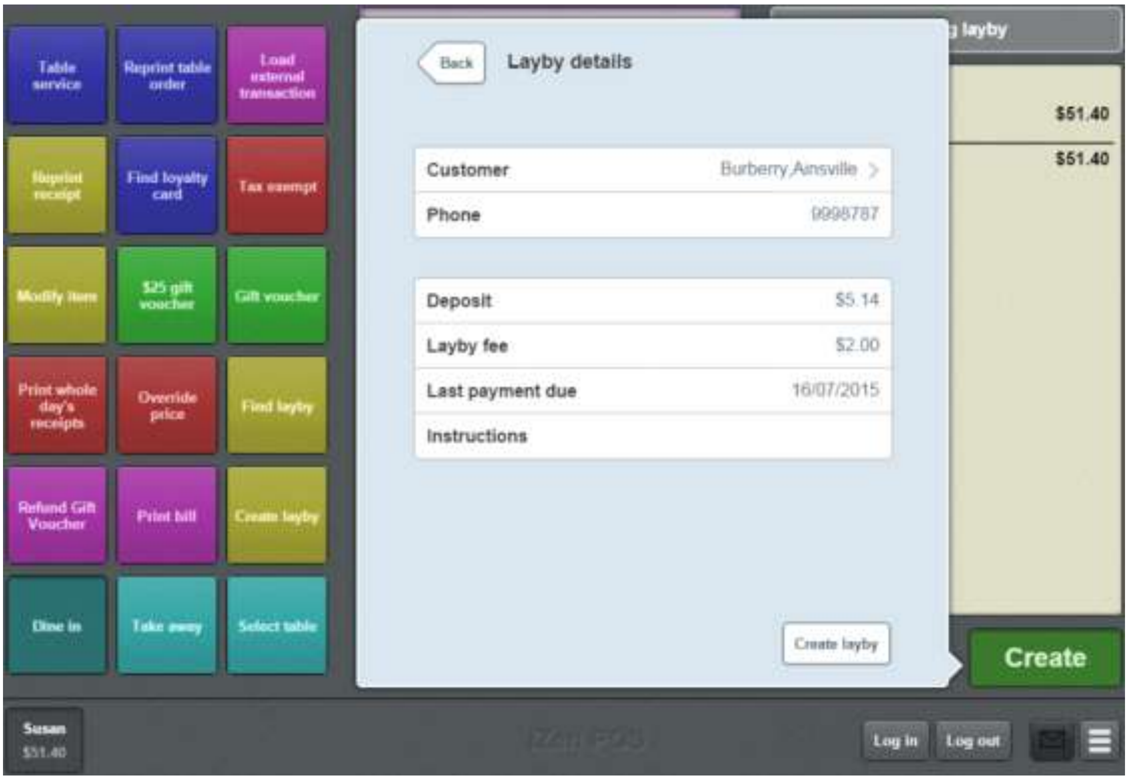


4. Either:
    1. Search for the customer you want to create a layby for.

       See *Finding a customer* on page 541.
    2. Create a new customer.

       See *Creating a new customer*.

   The layby details are displayed.



Layby details

Customer	Burberry Ainsville
Phone	9998787
Deposit	$5.14
Layby fee	$2.00
Last payment due	16/07/2015
Instructions	

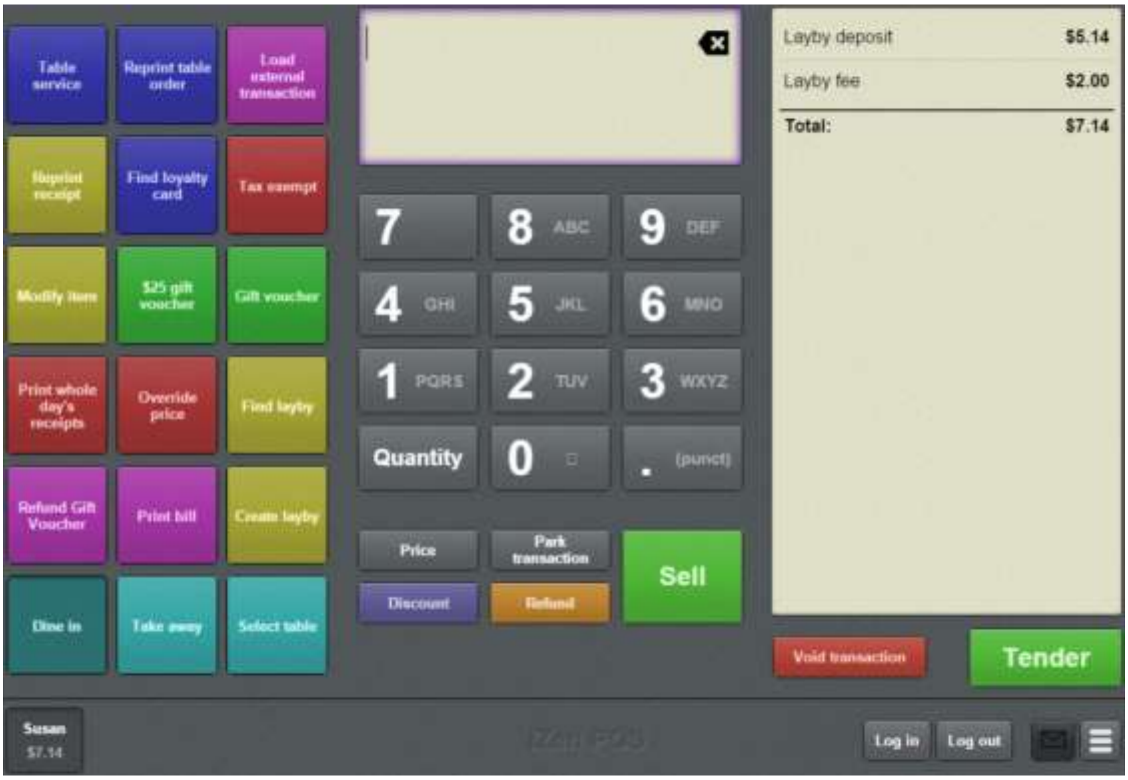
5. If you want to adjust the deposit, type the new deposit amount in the **Deposit** field.

> **Note:** The minimum deposit is configured in the Terminal setup screen. See *Setting up laybys on the Point of Sale* on page 26.

6. If you want to adjust the layby fee, type the new fee in the **Layby** fee field.

> **Note:** The fee amount is in addition to the deposit. It does not count towards the layby total.

7. If you need to note any comments or instructions, type them in the **Instructions** field.
8. Press Create layby.



Layby deposit	$5.14
Layby fee	$2.00
Total:	$7.14

> **Note:** You can add additional items to the transaction if required.

9. Press Tender.

   The Tender screen is displayed.

10. Tender the transaction as normal.

    See *Tendering transactions* on page 465.

Finding an layby

Find a layby if you want to:

- View the details of the layby.

  See *Layby details screen* on page 581.

- Pay all or part of the layby balance.

  See *Paying a layby* on page 565.

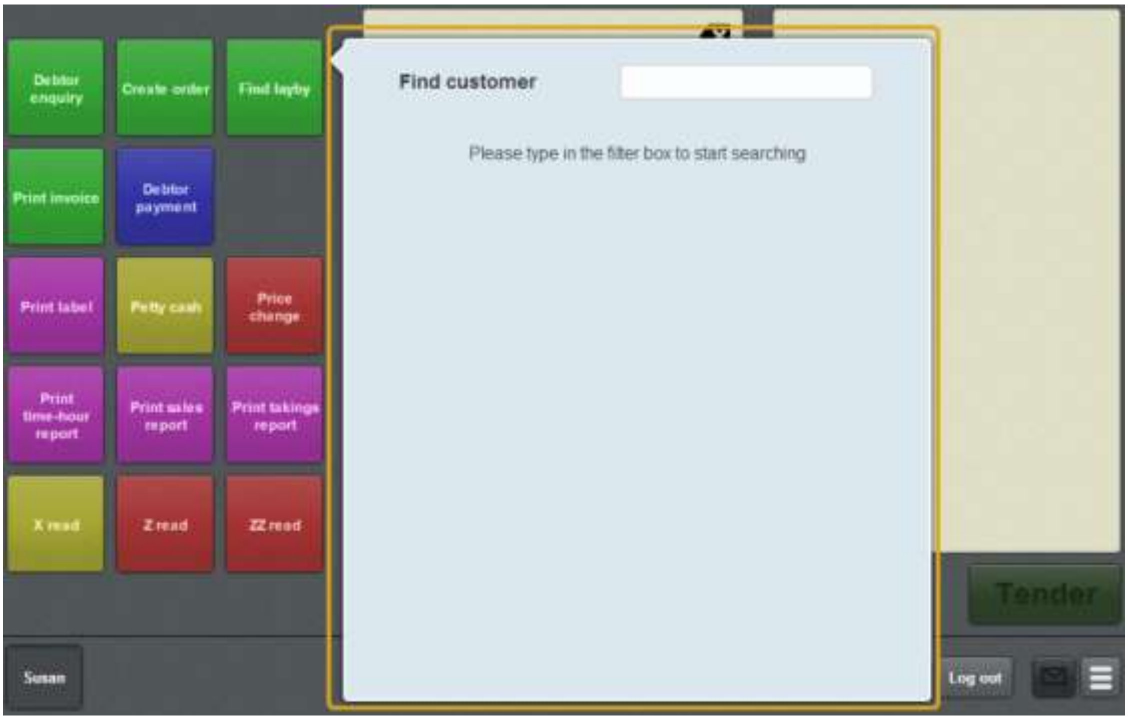
> **Note:** You can only search for laybys via a one-shot button. See *Creating a one-shot button to find laybys* on page 171.

To find an layby:

1. Press the Find layby one-shot button.

   > **Note:** Your one-shot button configuration may appear different to the documentation.

   The Find customer screen is displayed.



Find customer

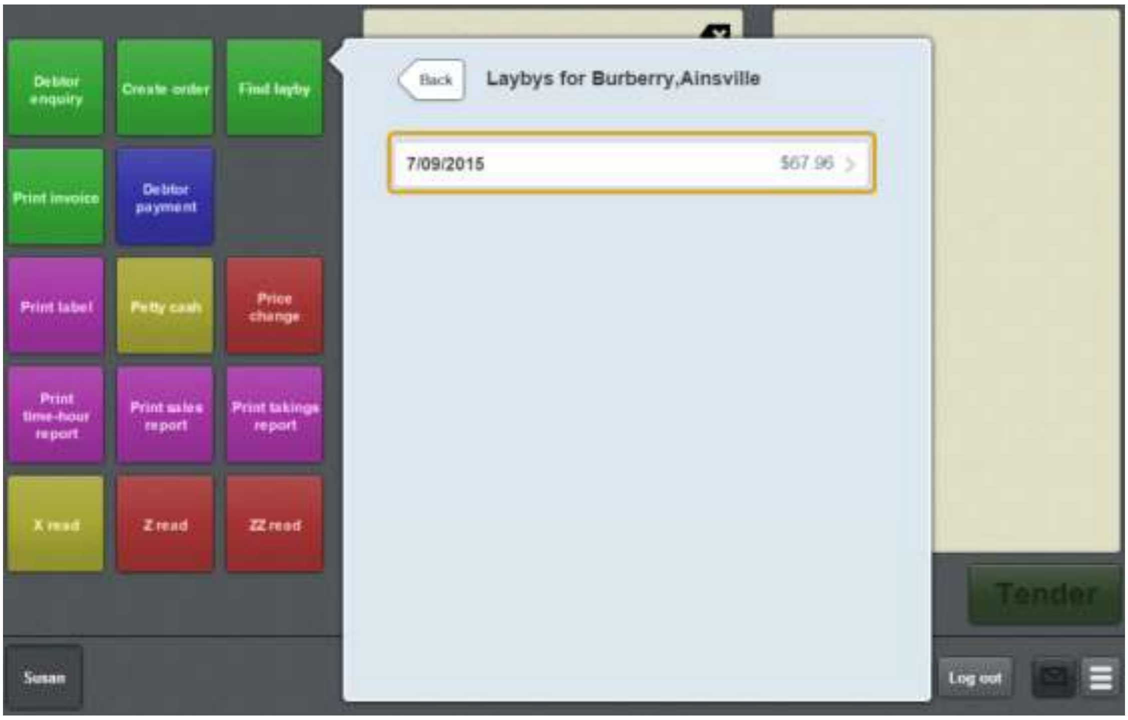
Please type in the filter box to start searching

2. Search for the customer whose layby it is.

   See *Finding a customer* on page 541.

   > **Note:** Only customers with open laybys are displayed.

The Laybys for customer screen is displayed.

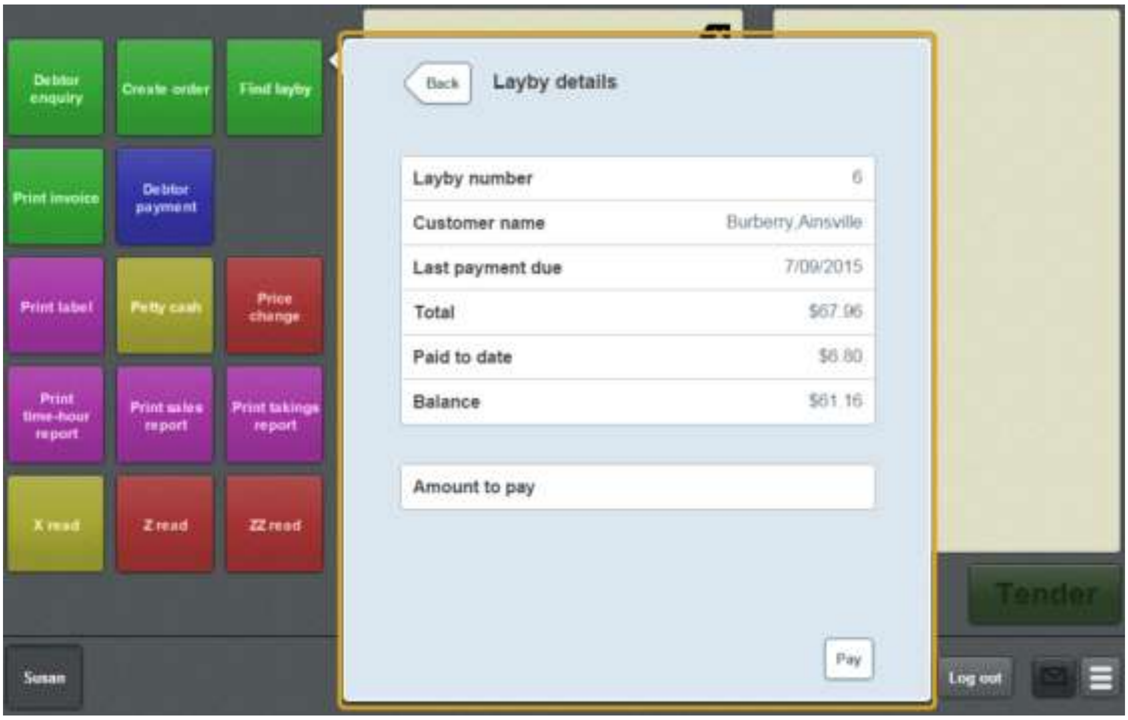


Laybys for Burberry,Ainsville

7/09/2015 $67.96

3. Press the layby you want to view.

   The layby details screen is displayed.



Layby details

Layby number	6
Customer name	Burberry,Ainsville
Last payment due	7/09/2015
Total	$67.96
Paid to date	$6.80
Balance	$61.16

Amount to pay

See *Layby details screen* on page 581.

Paying a layby

Pay a layby when you want to add a customer's payment to their layby balance to reduce the amount owed. Payments can be all or part of what is owed, but cannot be more than what is owed.

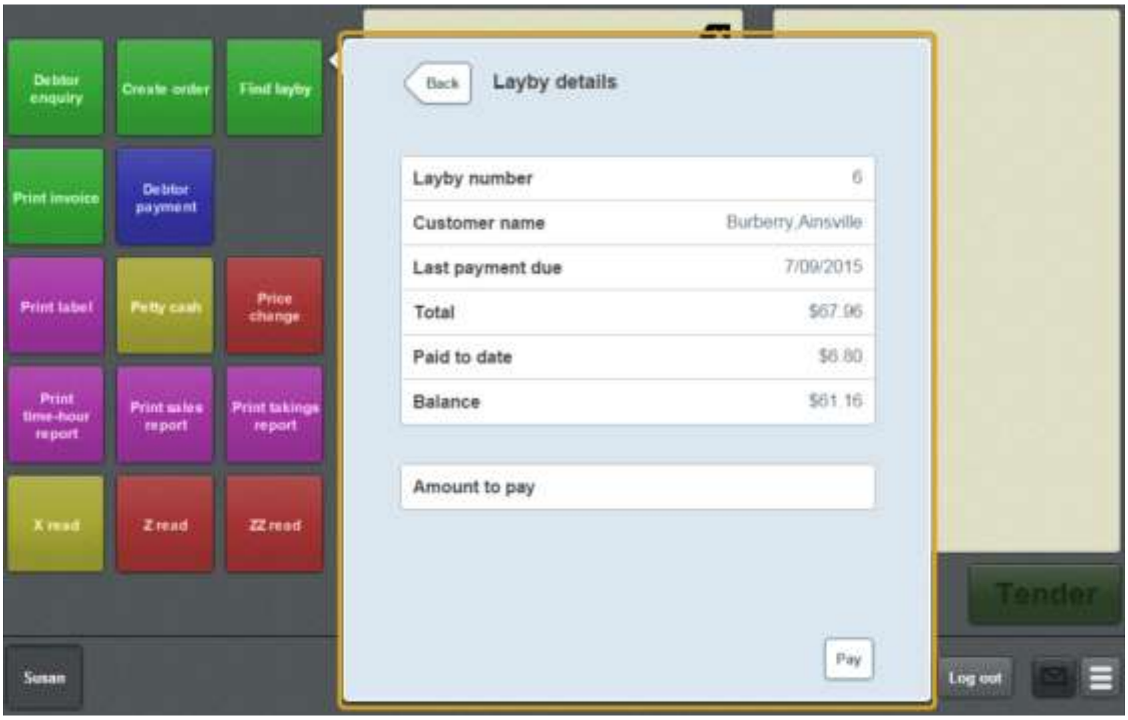
For example, if a customer owes $50 on their layby, they may pay the full $50, or make a partial payment of $30, but they cannot pay more than the $50 owed.

To pay a layby:

1. Find the layby.

   See *Finding an layby* on page 563.

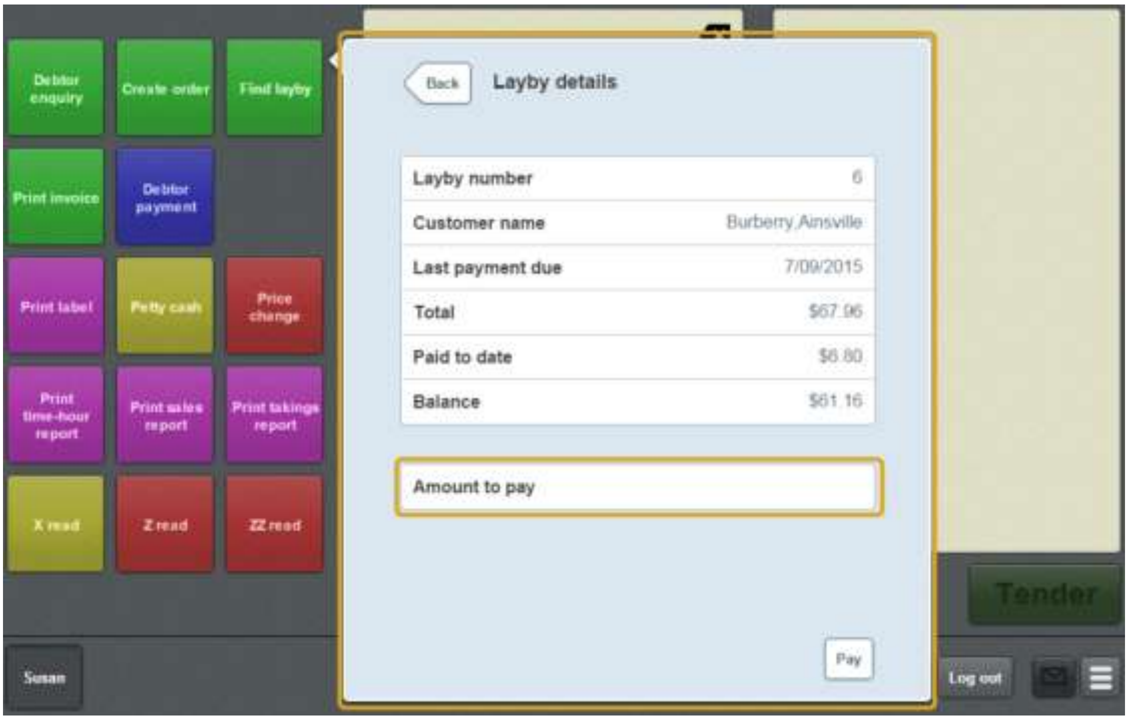
2. The customer layby is displayed.



Layby details

Layby number	6
Customer name	Burberry,Ainsville
Last payment due	7/09/2015
Total	$67.96
Paid to date	$6.80
Balance	$61.16
Amount to pay	

3. Type in the amount the customer wants to pay in the Amount to pay field.



Layby details

Layby number	6
Customer name	Burberry,Ainsville
Last payment due	7/09/2015
Total	$67.96
Paid to date	$6.80
Balance	$61.16

Amount to pay

4. Press Pay.

   The layby payment is added to the transaction.

5. Continue the transaction as normal.

   See *Selling and refunding items* on page 409.

Cancelling a layby

You cannot cancel a layby using the Point of Sale. If you need to cancel a layby, log into the Portal via a web browser and make the necessary changes.

Find customer or debtor screen

Use the Find customer or Find debtor screen to search for customers or debtors. See *Finding a customer* on page 541.

> **Note:** The Find debtor screen is exactly the same as the Find customer screen, except it searches only for customers who are also debtors. The Find debtor screen is opened by pressing the Debtor enquiry or Debtor payment one-shot buttons. See *Creating a one-shot button for debtor enquiries* on page 147 and *Creating a one-shot button for debtor payments* on page 167.

Opening the Find customer screen

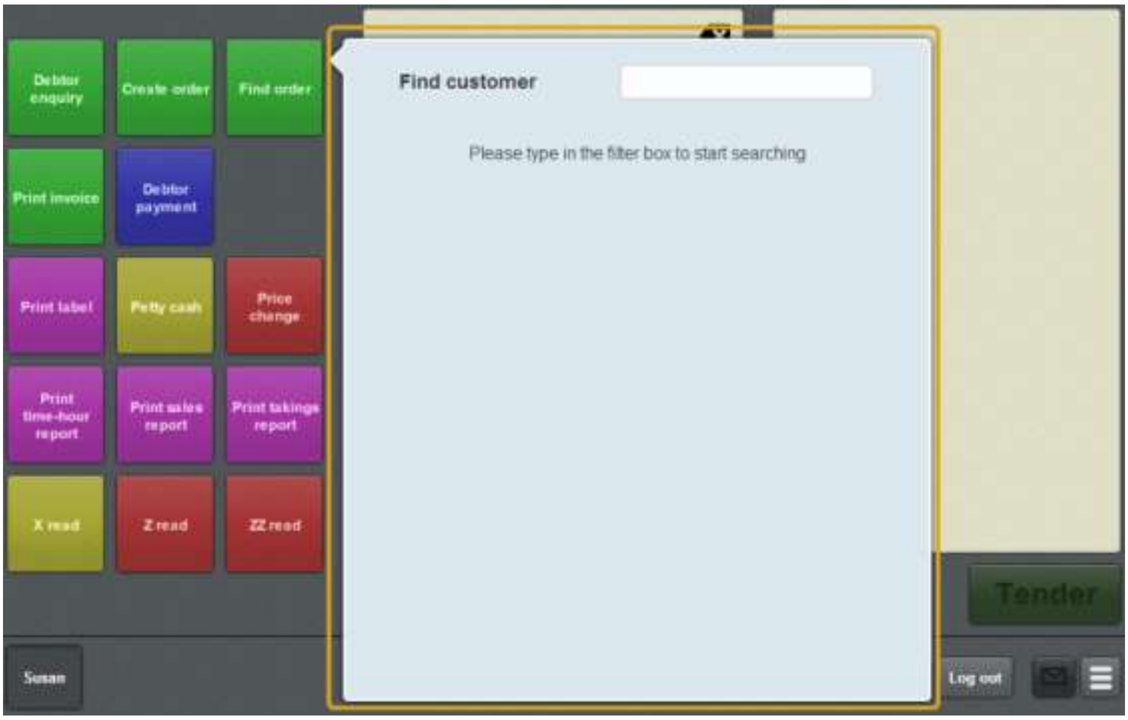
To open the Find customer or Find debtor screen:

1. Either:
    - Press the **Debtor enquiry** one-shot button.
    - Press the **Find order** one-shot button.
    - Press the **Debtor payment** one-shot button.
    - Create an order on the Transaction screen.

      See *Creating a customer order* on page 543.
    - Tender a debtor payment on the Tender screen.

      See *Tendering debtor payments* on page 476.

   The Find customer screen is displayed.



Please type in the filter box to start searching

Find customer screen key fields and buttons

Field	Description
Find customer	Type part or all of the customer's name to search for customers. **Note:** You can use any part of the customer's name. For example, **APPL**, **PLES** and **SEED** all return a match with Appleseeds. See *Finding a customer* on page 541.
Search results	The name of each customer is displayed. Press the customer to select them.

Customer orders screen

Use the Customer orders screen to select customer orders to view, complete or duplicate.

See:

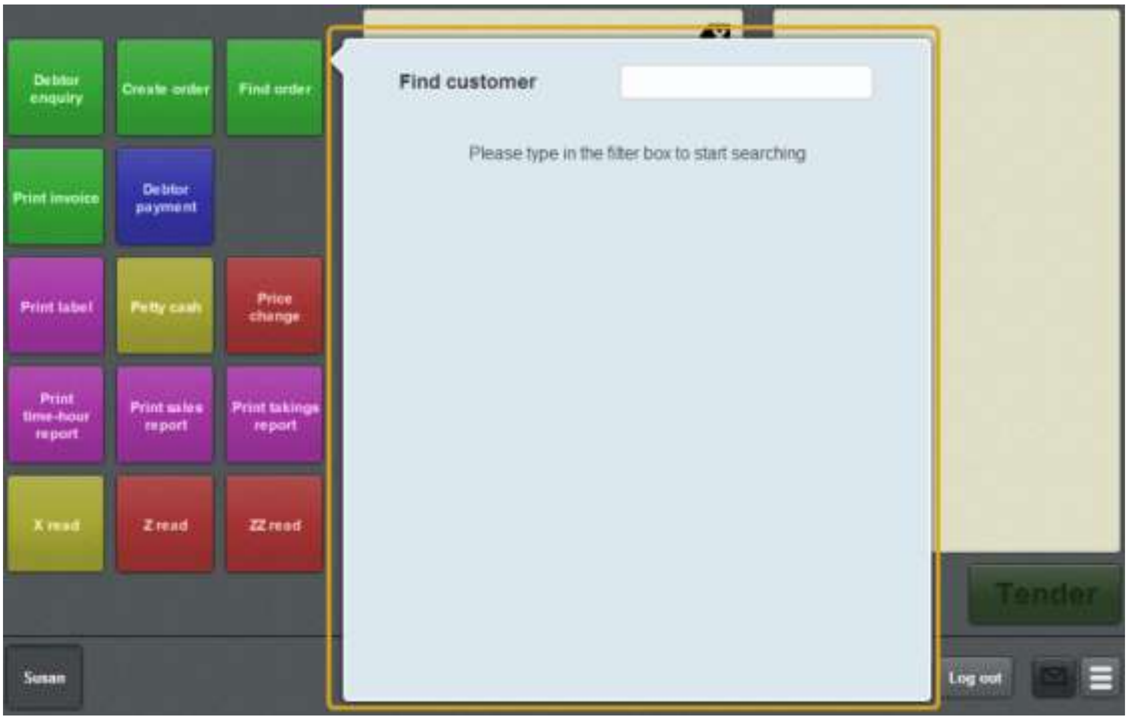
- *Finding an order* on page 547.
- *Completing a customer order* on page 552.
- *Duplicating a customer order* on page 554.

Opening the Customer orders screen

To open the Customer orders screen:

1. Press the **Find order** one-shot button.

   The Find customer screen is displayed.

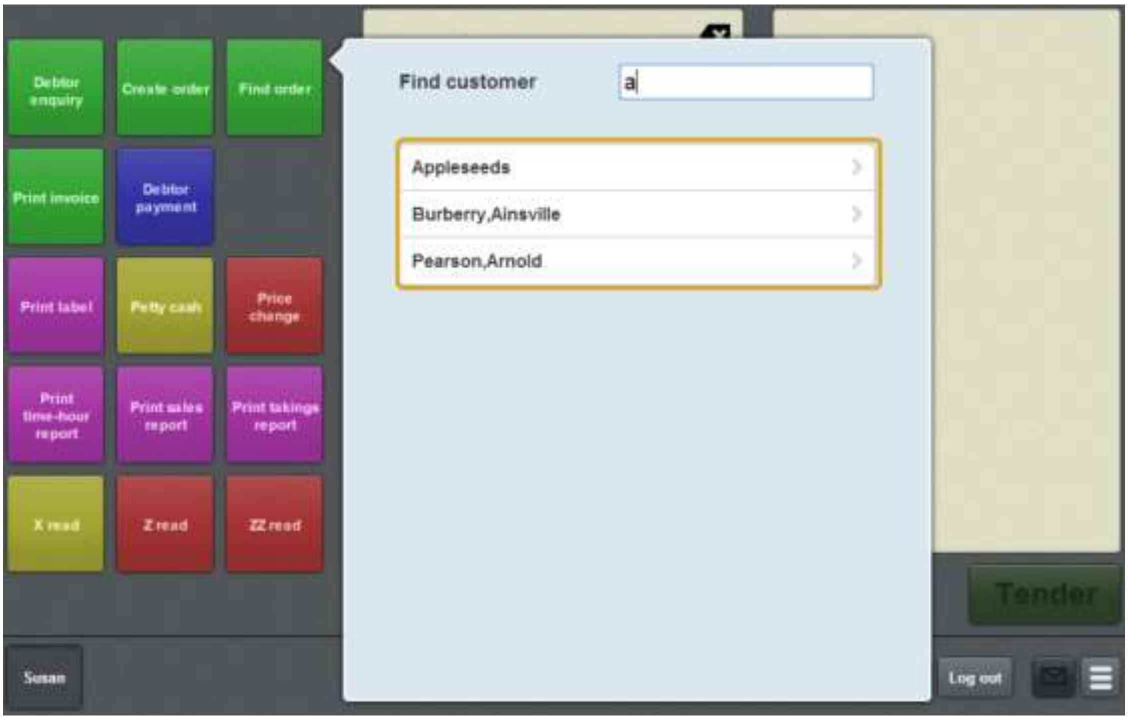


Find customer

Please type in the filter box to start searching

2. Search for the customer whose orders you want to find.

   See *Finding a customer* on page 541.

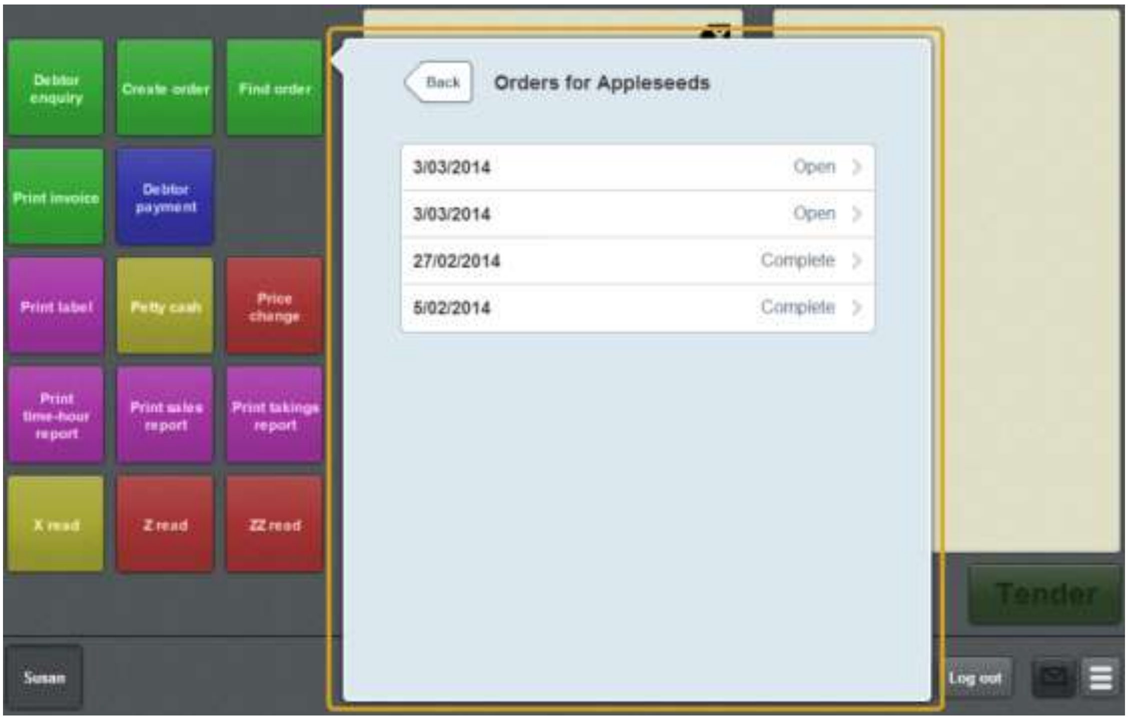


Find customer: a

- Appleseeds
- Burberry,Ainsville
- Pearson,Arnold

3. Press the customer whose orders you want to view.

   The Customer orders screen is displayed.



Orders for Appleseeds

3/03/2014	Open
3/03/2014	Open
27/02/2014	Complete
5/02/2014	Complete

Customer orders screen key fields and buttons

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Date</td><td>The date the order was created.</td></tr>
<tr><td>Status</td><td>The status of the order:
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Open</td><td>The order has been created and is awaiting fulfilment.</td></tr>
<tr><td>Fulfilled</td><td>The order has been created, and has been marked as fulfilled on the Portal.
Note: The item weights of the fulfilled order may differ slightly from those requested in the original order, as the Portal records the actual weight of each item included in the order.</td></tr>
<tr><td>Complete</td><td>The order has been created and collected by the customer.
Note: It is possible to complete an order that has not been marked as fulfilled. In this case, the requested weights</td></tr>
</table></td></tr>
<tr><td>Back</td><td>Return to the Find customer results screen to choose another customer.</td></tr>
</table>

Order details screen

Use the Order details screen to:

- View the order number, delivery date and deposit amount.
- View the order contents.
- Duplicate a customer's order.

  See *Duplicating a customer order* on page 554.
- Mark a customer's order as complete.

  See *Completing a customer order* on page 552.
- Add a payment to a customer order.

  See *Adding a payment to a customer order* on page 550.

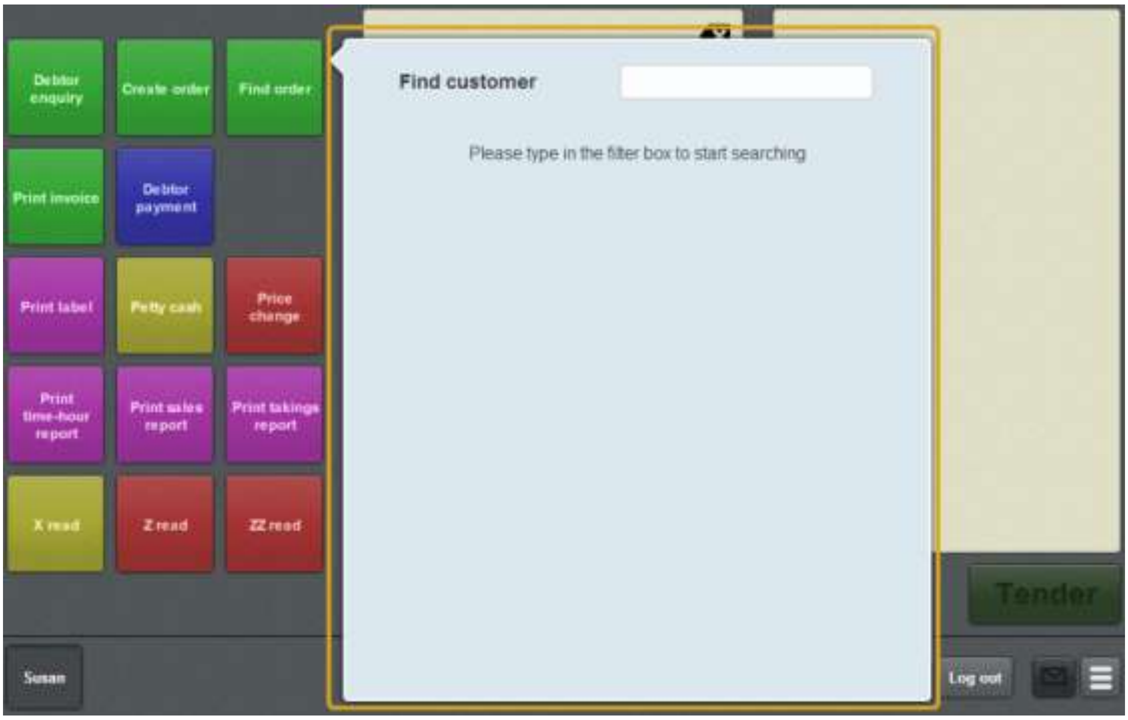
Note: Orders cannot be edited on the Point of Sale.

Opening the Order details screen

To open the Order details screen:

1. Press the **Find order** one-shot button.

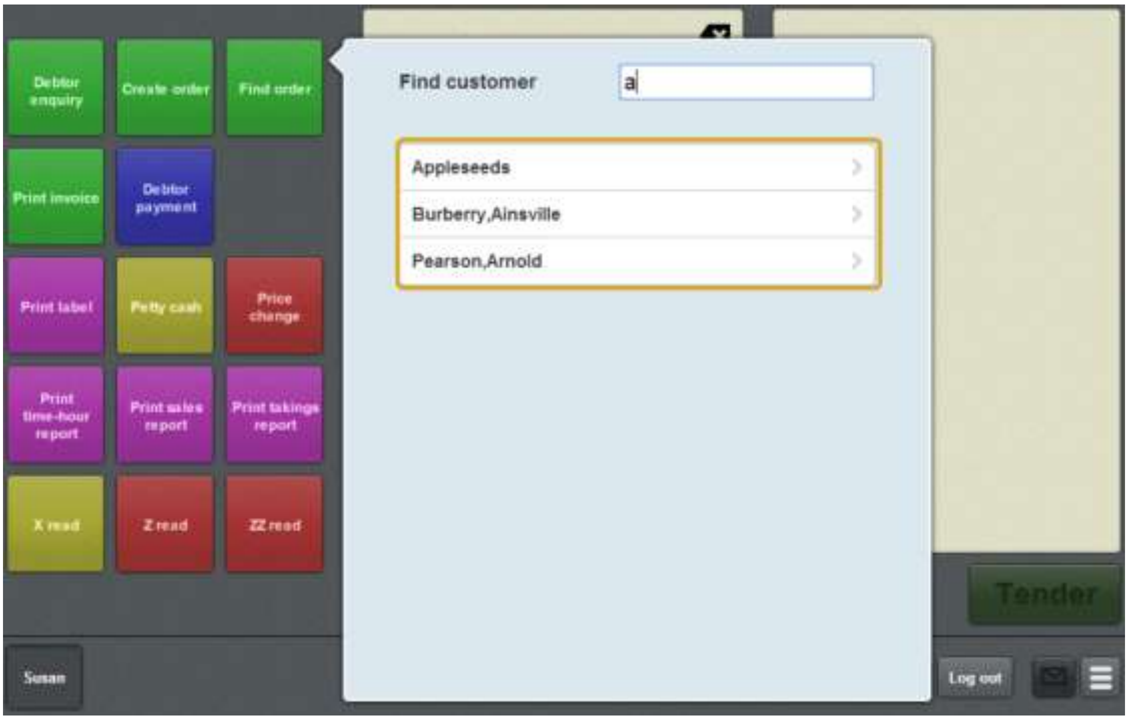
   The Find customer screen is displayed.



Please type in the filter box to start searching

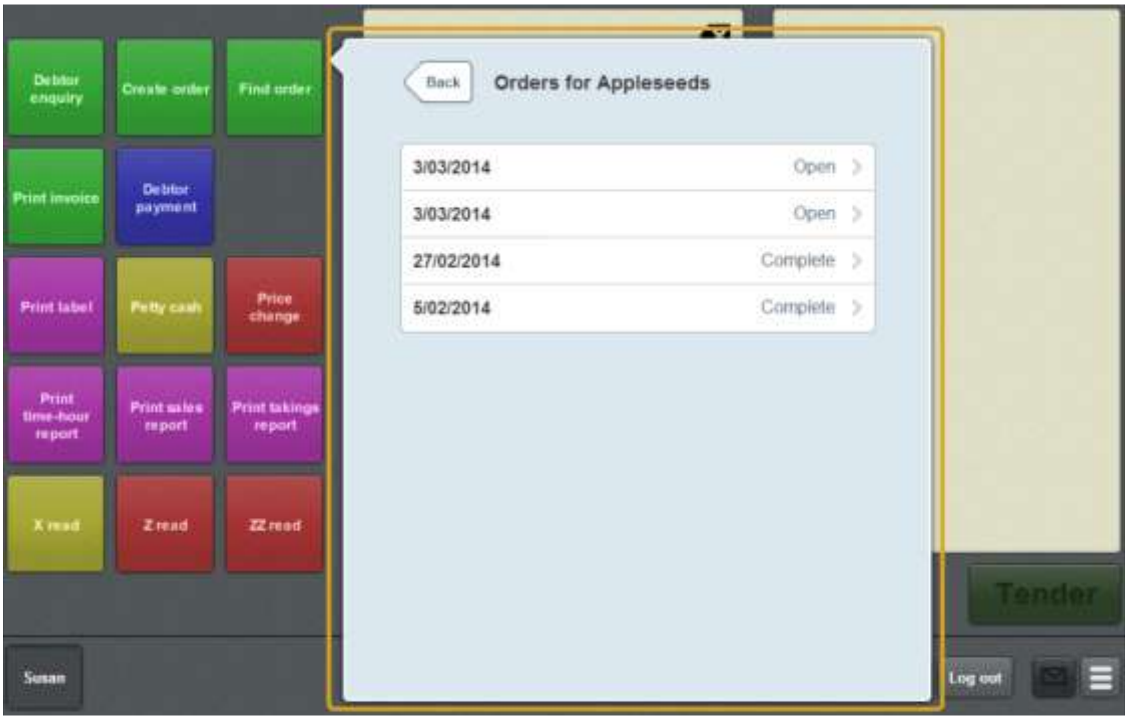
2. Search for the customer whose orders you want to find.

   See *Finding a customer* on page 541.



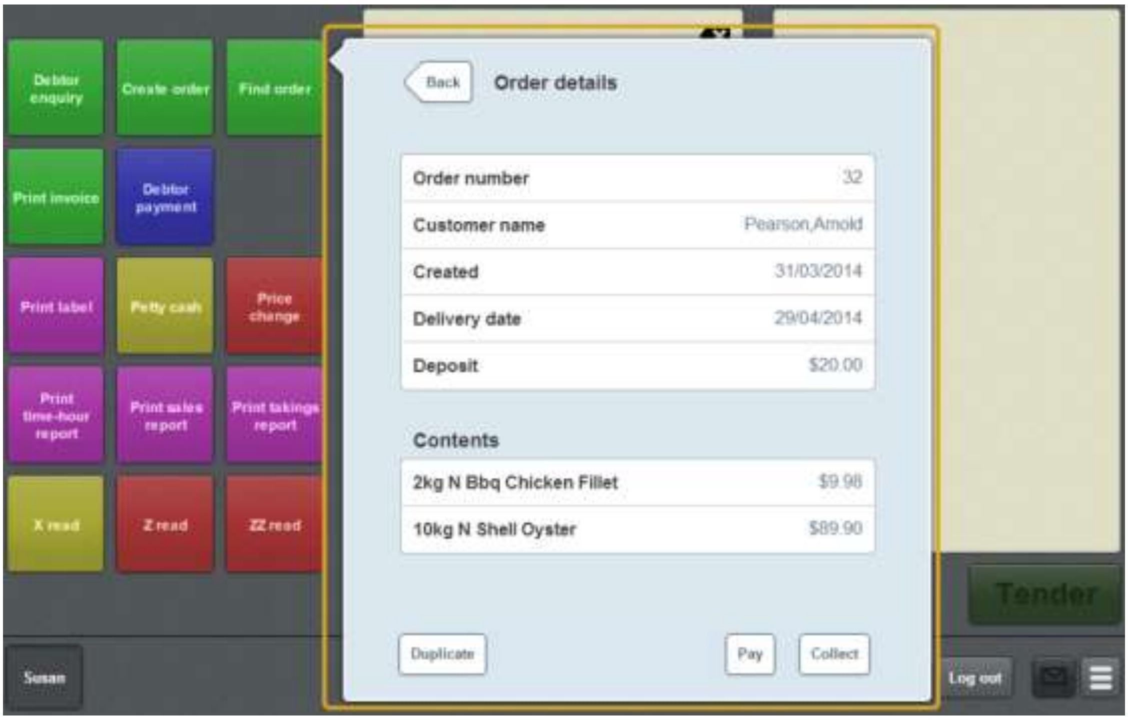
3. Press the customer whose orders you want to view.

   The Customer orders screen is displayed.



4. Press the order you want to view.

   The Order details screen is displayed.



Order details

Order number	32
Customer name	Pearson,Arnold
Created	31/03/2014
Delivery date	29/04/2014
Deposit	$20.00

Contents

2kg N Bbq Chicken Fillet	$9.98
10kg N Shell Oyster	$89.90

Order details screen key fields and buttons

Note: These fields are not editable. Orders can only be edited on the Portal.

Order area

This area displays information about the order itself.

Field	Description
	Press to return to the Customer orders screen and select a different order. See *Customer orders screen* on page 570.
Order number	The unique number that identifies this order on the Portal.
Customer name	The name of the customer who placed the order.
Created	The date the order was created.
Delivery date	The date the order is scheduled for delivery.
Deposit	The deposit paid for the order.
	Press to duplicate this order for a new delivery date. See *Duplicating a customer order* on page 554.
	Press to add a payment to this order. See *Adding a payment to a customer order* on page 550.
	Press to collect this order.

Field	Description
	See *Completing a customer order* on page 552.

Contents area

This area displays information about the items the order contains.

Field	Description
Quantity	The number of units or amount of weight ordered for this item.
Item name	The name of the ordered item.
Line price	The total price of this item line. That is, the item's individual unit price multiplied by the quantity.

Print invoice screen

Use the Print invoice screen to print customer invoices.

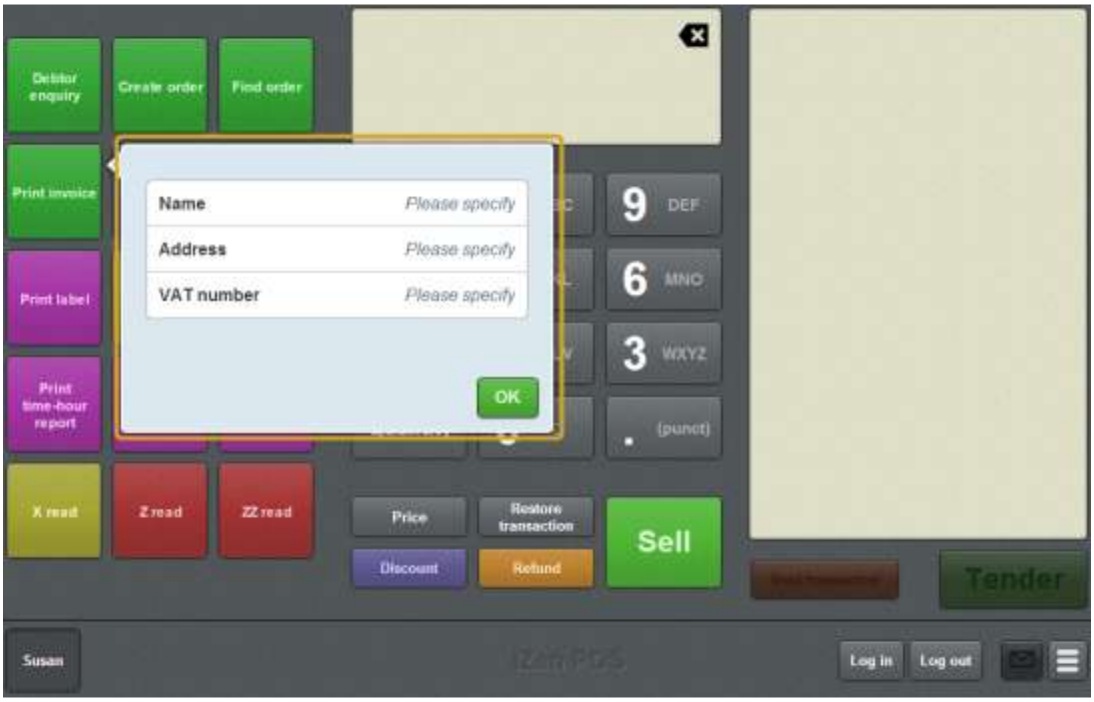
Opening the Print invoice screen

To open the Print invoice screen:

1. Press the **Print invoice** one-shot button.

> **Note:** Your one-shot button configuration may be different to the documentation.

The Print invoice screen is displayed.



Print invoice screen key fields and buttons

Field	Description
Name	The customer's name.
Address	The customer's address.
VAT Number	The customer's tax number.

Layby details screen

Use the Layby details screen to view a customer's layby and add payments to their layby balance.

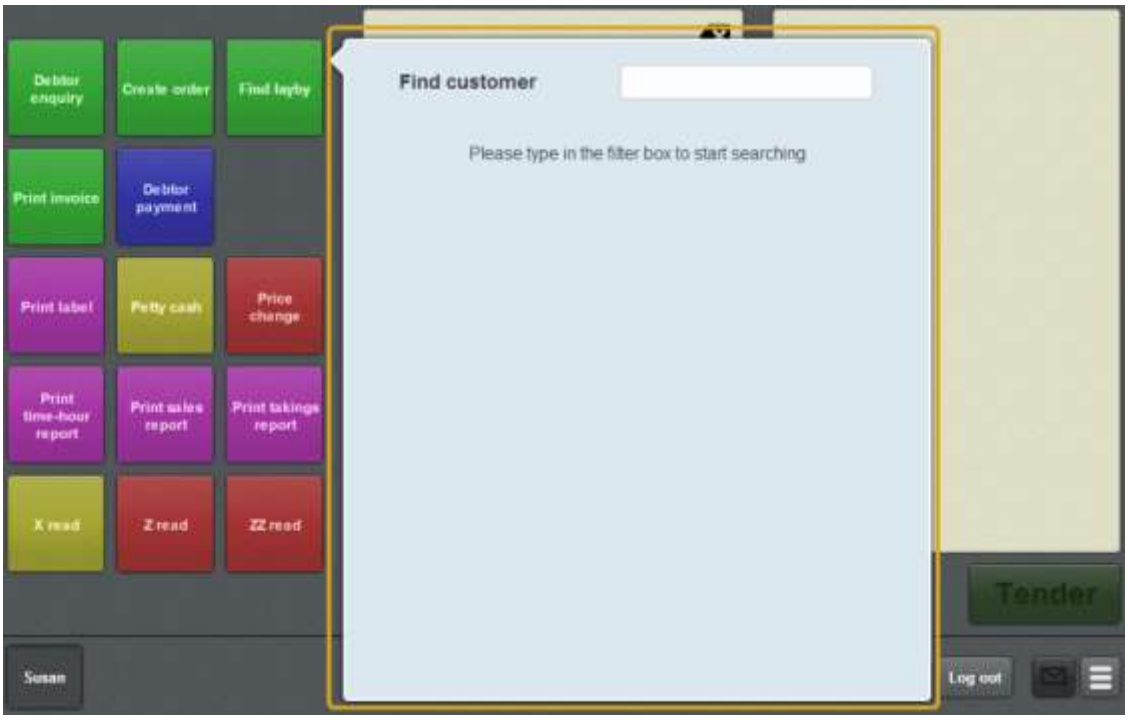
Opening the Layby details screen

To open the Layby details screen:

1. Press the Find layby one-shot button.

> **Note:** Your one-shot button configuration may appear different to the documentation.

The Find customer screen is displayed.



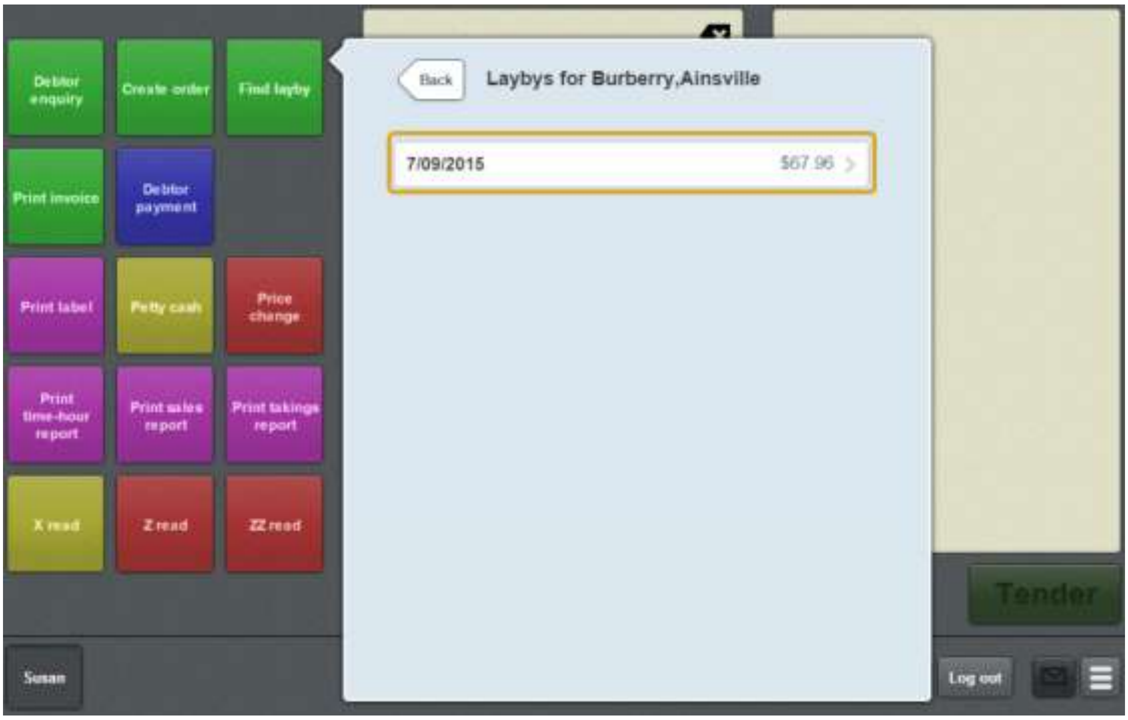
Please type in the filter box to start searching

2. Search for the customer whose layby it is.

See *Finding a customer* on page 541.

> **Note:** Only customers with open laybys are displayed.

The Laybys for customer screen is displayed.

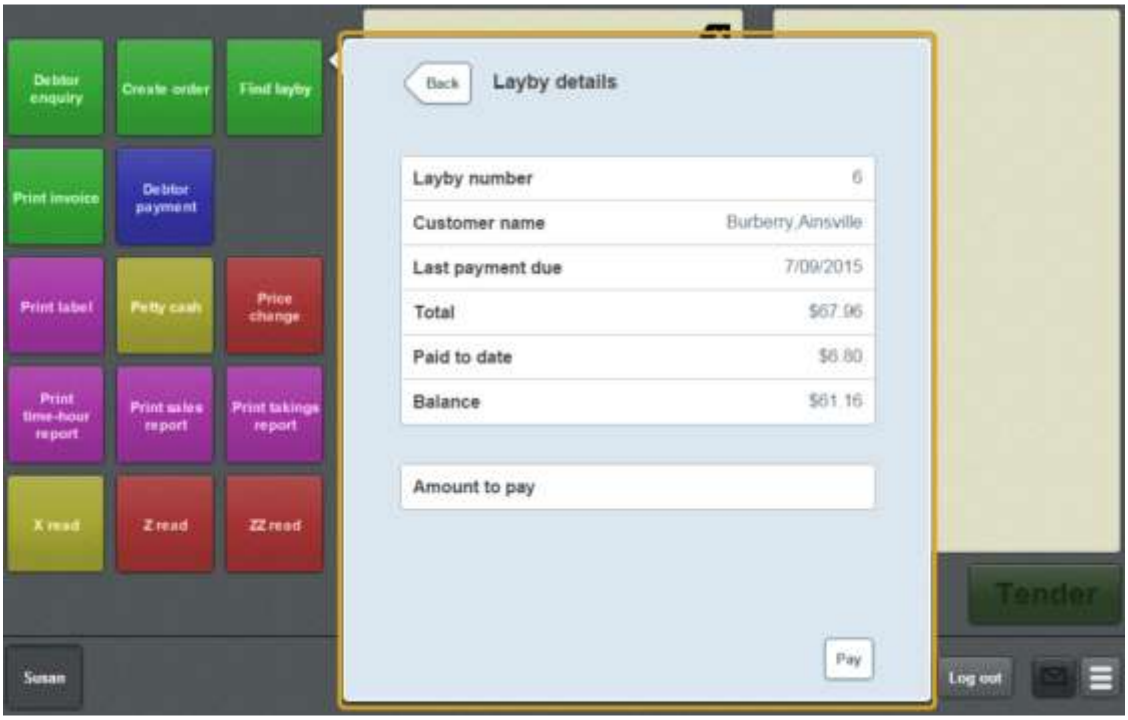


Laybys for Burberry,Ainsville

7/09/2015 $67.96

3. Press the layby you want to view.

   The layby details screen is displayed.



Layby details

Layby number	6
Customer name	Burberry,Ainsville
Last payment due	7/09/2015
Total	$67.96
Paid to date	$6.80
Balance	$61.16

Amount to pay

See *Layby details screen* on page 581.

Layby details screen key fields and buttons

Field	Description
Back	Return to the list of laybys for the selected customer.
Layby number	A unique number identifying the layby.
Customer name	The name of the customer who owns the layby.
Last payment due	The date the layby must be paid in full by. **Note:** This field is not editable.
Total	The total amount of the layby.
Paid to date	The amount of the layby that has been paid so far.
Balance	The amount still to pay on the layby.
Amount to pay	The amount the customer wants to pay in this transaction. See *Paying a layby* on page 565.
Pay	Press to add the amount listed in the **Amount to pay** field to the current transaction.

Managing debtors

Debtors can use their debtor accounts to pay for transactions, and make payments back to their debtor accounts via the Point of Sale.

Key concepts

Credit limit
Debtor
Debtor balance
Debtor enquiry
Debtor payment
Discount
Finalise
Item
One-shot button
Point of Sale
Portal
Price level
Quantity
Refund
Transaction

Also see the following topics:

- *Find customer or debtor screen* on page 568.
- *Debtor details screen* on page 596.
- *Debtor payment screen* on page 600.

What you can do:

- *Performing a debtor enquiry* on page 587.
- *Finding a debtor* on page 585.
- *Viewing a debtor's details* on page 588.
- *Adding a debtor to a transaction* on page 590.
- *Adding a debtor payment to a transaction* on page 593.

Finding a debtor

Find a debtor if you want to:

- View a debtor's details.

  See *Viewing a debtor's details* on page 588.

- Add a debtor to a transaction.

  See *Adding a debtor to a transaction* on page 590.

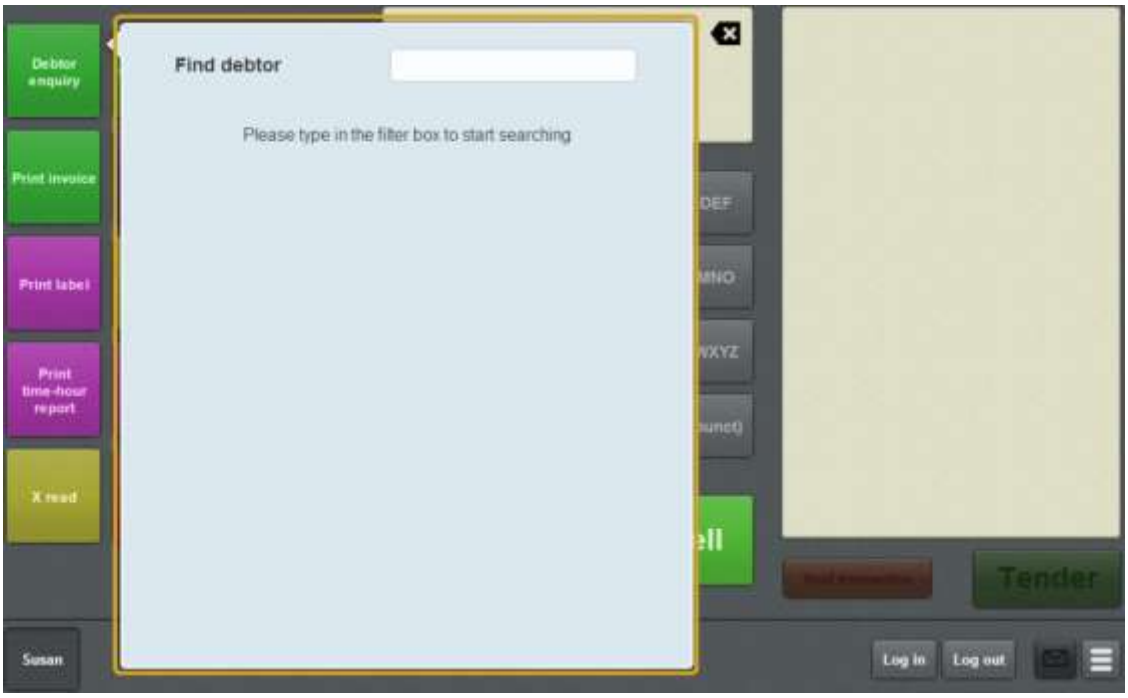
- Add a debtor tender to a transaction.

  See *Tendering debtor payments* on page 476.

> **Note:** Some of these tasks require you to find the debtor at the start of the task, while others prompt you to find the debtor near the end of the task. In either case, the procedure for finding the debtor using the Find debtor screen is the same.

To find a debtor in the Find debtor screen:

1. The Find debtor screen is displayed.



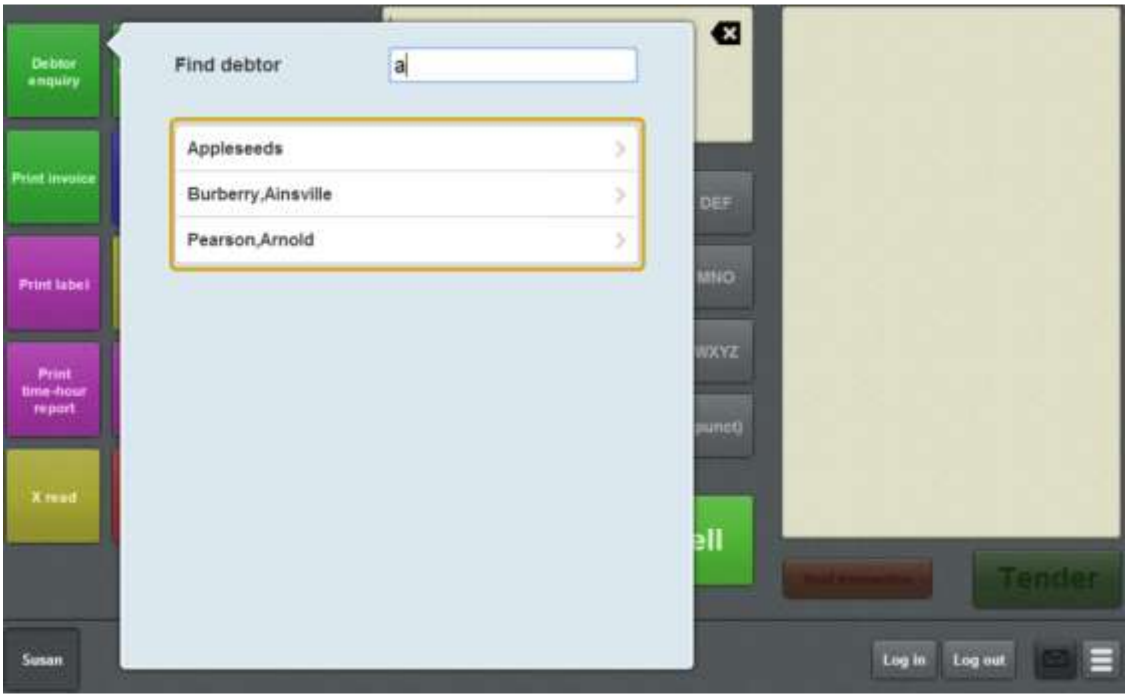
Find debtor

Please type in the filter box to start searching

2. Press the search field.
3. Type in a few letters of the debtor's first or last name.

> **Note:** The debtor search matches any contiguous part of the debtor's name. For example, if the debtor's name is Appleseeds, the debtor search matches **APP**, **PLE** or **SEE** but not **APS**

The search results are displayed.



Find debtor: a

Appleseeds

Burberry,Ainsville

Pearson,Arnold

4. Press the name of the relevant debtor.

   The debtor is selected, and you can continue your task.

Performing a debtor enquiry

Perform a debtor enquiry to find a debtor and view their details, or add them to a transaction.

See:

- *Viewing a debtor's details* on page 588.
- *Adding a debtor to a transaction* on page 590.

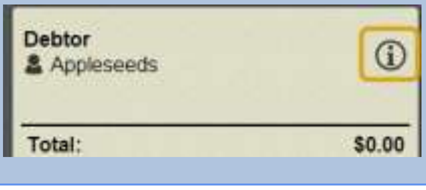
Also see *Finding a debtor* on page 585.

Viewing a debtor's details

You can view a debtor's details, including the:

- Debtor's name and address.
- Credit limit, current balance and available credit.
- Discounts and price levels the debtor receives.

> **Note:** You can only search for a debtor via a one-shot button. See *Creating a one-shot button for debtor enquiries* on page 147.

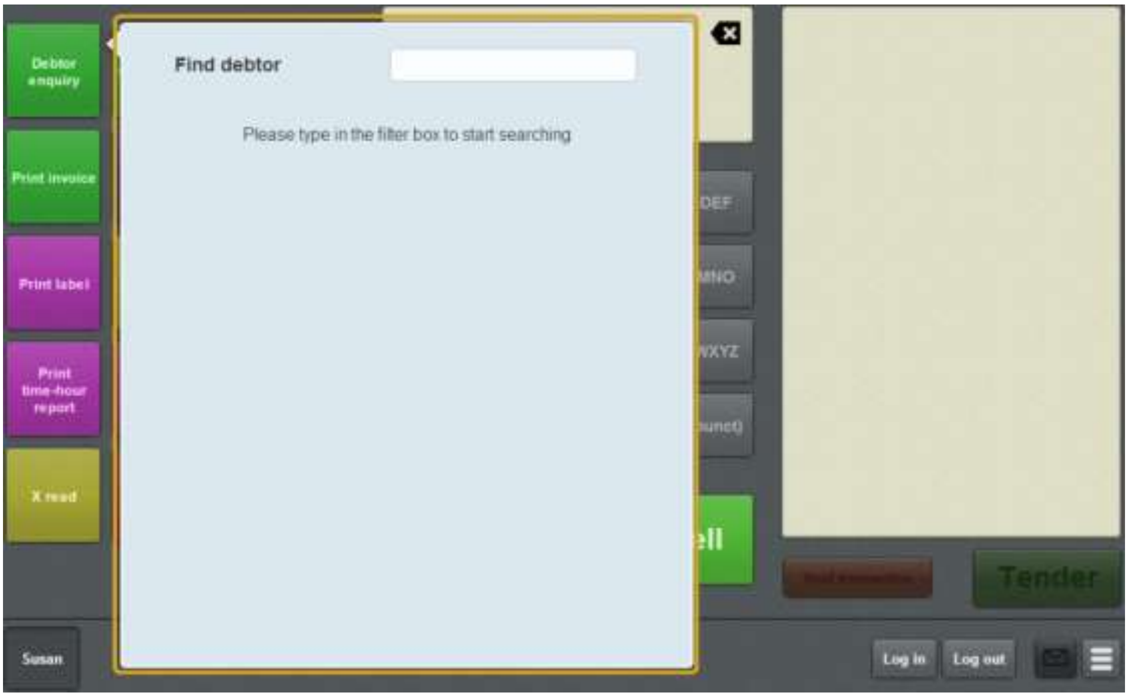
> **Note:** If a debtor has been added to a transaction, you can view their details by pressing the button in the Transaction list.
>
> 
>

To view a debtor's details:

1. Press the **Debtor enquiry** one-shot button.

   > **Note:** Your one-shot button configuration may appear different to the documentation.

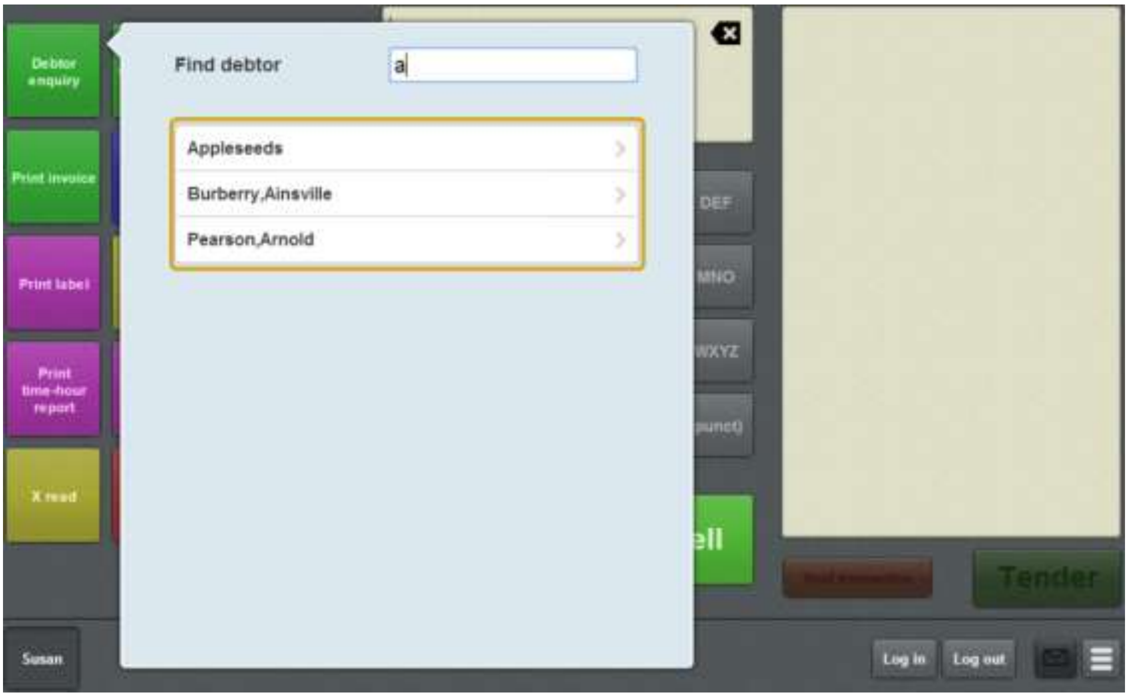
   The Find debtor screen is displayed.

   Please type in the filter box to start searching

2. Search for the debtor you want to view.

   See *Finding a debtor* on page 585.

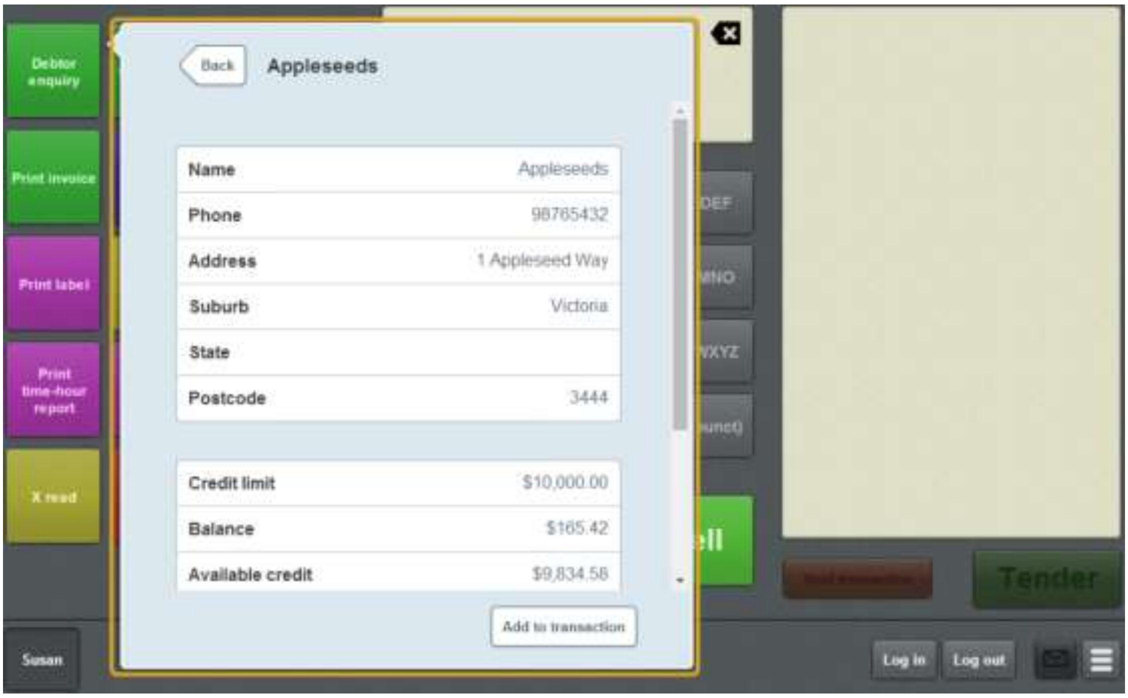


Find debtor: a

- Appleseeds
- Burberry,Ainsville
- Pearson,Arnold

3. Press the appropriate debtor from the search results.

   The debtor details screen is displayed.



Appleseeds

Name	Appleseeds
Phone	98765432
Address	1 Appleseed Way
Suburb	Victoria
State	
Postcode	3444
Credit limit	$10,000.00
Balance	$165.42
Available credit	$9,834.58

See *Debtor details screen* on page 596.

Adding a debtor to a transaction

Add a debtor to a transaction to:

- Enable special discounts or price levels that the debtor is entitled to.
- Permit a debtor to pay for a transaction using their debtor account.

  See *Tendering debtor payments* on page 476.

Note: Adding a debtor to a transaction does not convert the transaction into a customer order. Customer orders can only be created using the Create order one-shot button while in an empty transaction. See *Creating a customer order* on page 543.

Note: Customers can only be added to transactions via a one-shot button. See *Creating a one-shot button for debtor enquiries* on page 147.

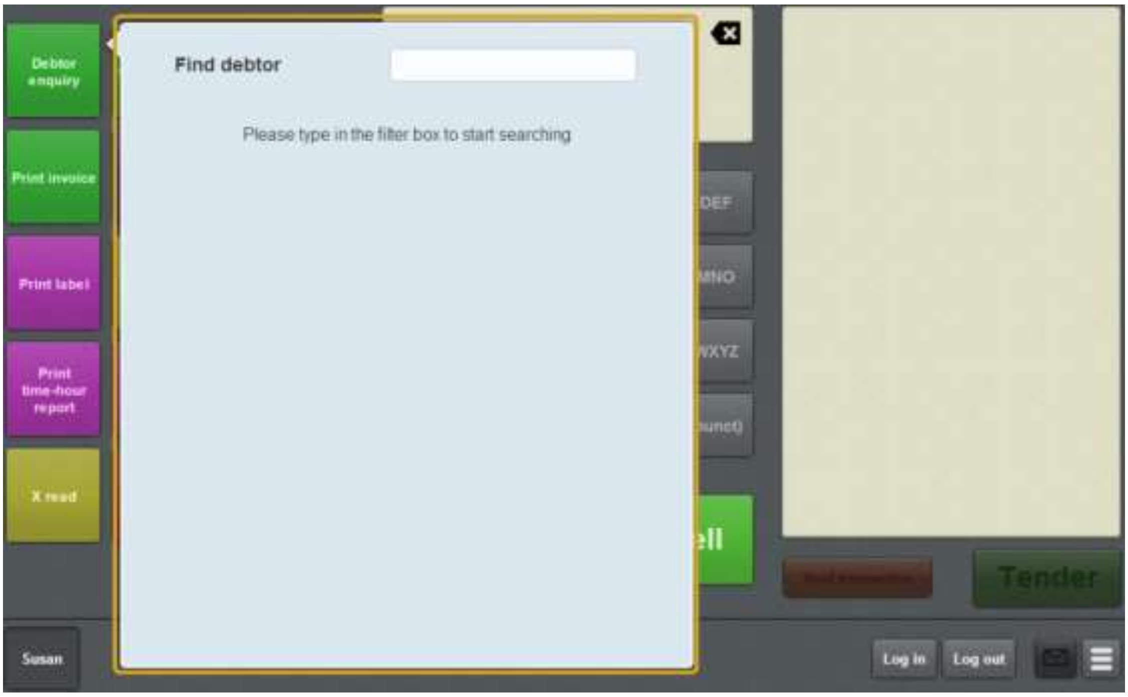
Note: You can add a debtor to a transaction at any point before the transaction is finalised, but only one debtor can be added to a transaction. If you add a second debtor , the first debtor is removed from the transaction.

To add a debtor to a transaction:

1. Press the **Debtor enquiry** one-shot button.

   Note: Your one-shot button configuration may appear different to the documentation.

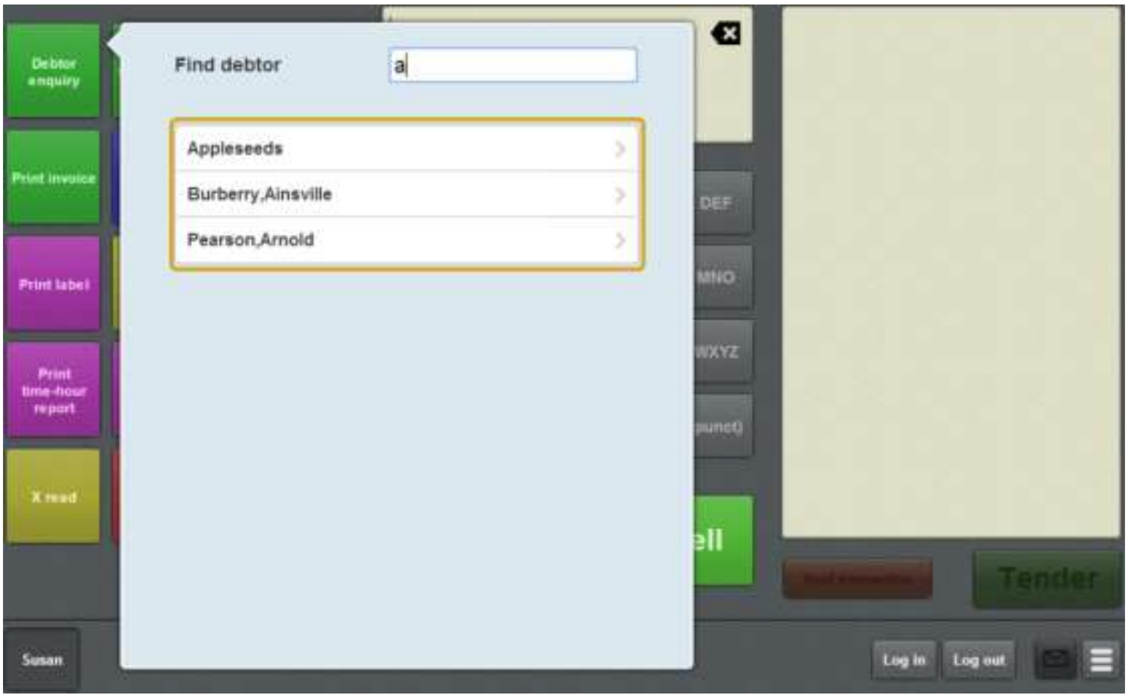
   The Find debtor screen is displayed.



Please type in the filter box to start searching

2. Search for the debtor you want to add to the transaction.

   See *Finding a customer* on page 541.

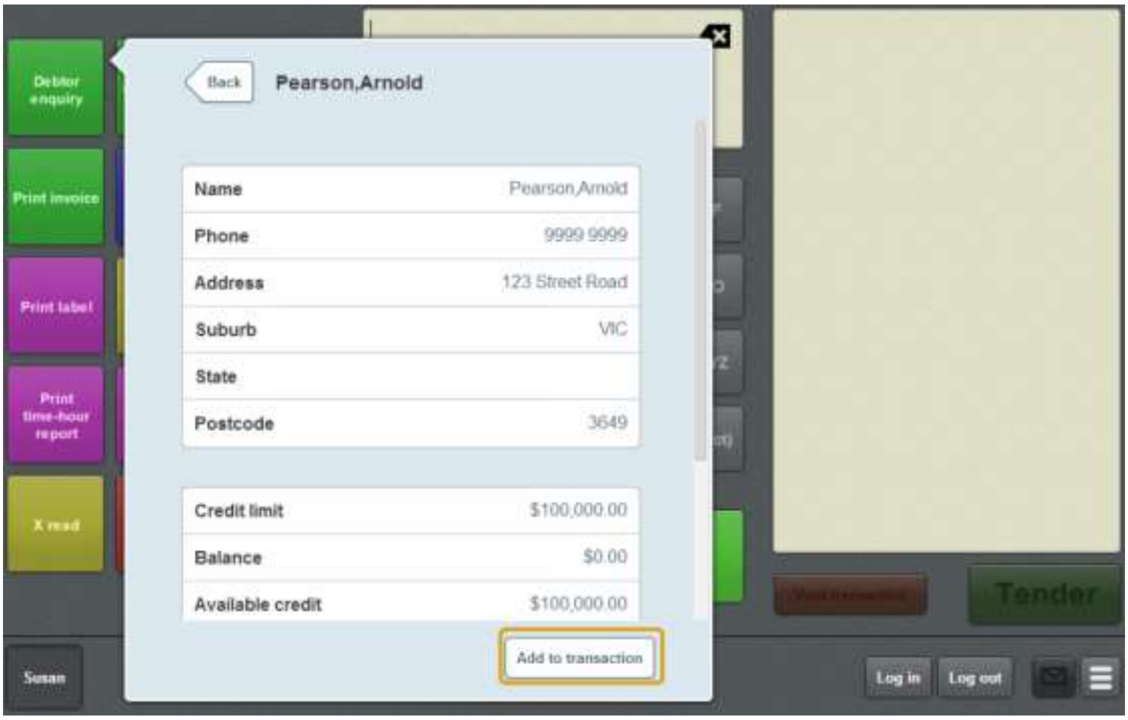


Appleseeds
Burberry,Ainsville
Pearson,Arnold

3. Press the appropriate debtor from the search results.

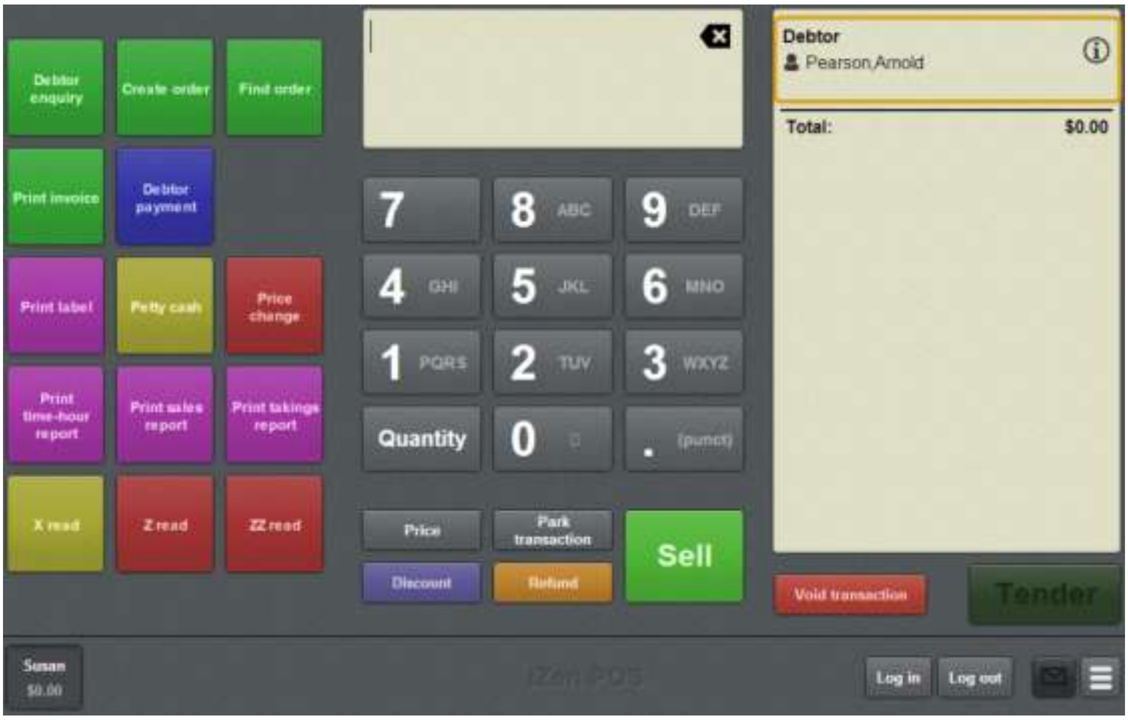
   The Debtor details screen is displayed.

4. Press Add to transaction.



Name	Pearson,Arnold
Phone	9999 9999
Address	123 Street Road
Suburb	VIC
State	
Postcode	3649
Credit limit	$100,000.00
Balance	$0.00
Available credit	$100,000.00

The debtor is added to the transaction.



Debtor
Pearson,Arnold

Total: $0.00

5. Continue the transaction as normal.

   See *Selling and refunding items* on page 409.

Adding a debtor payment to a transaction

Add a debtor payment if a debtor wants to pay off a portion of their debtor account via the Point of Sale.

> **Note:** Some debtors may have payment minimums configured on the Portal, and cannot make payments of less than this amount.

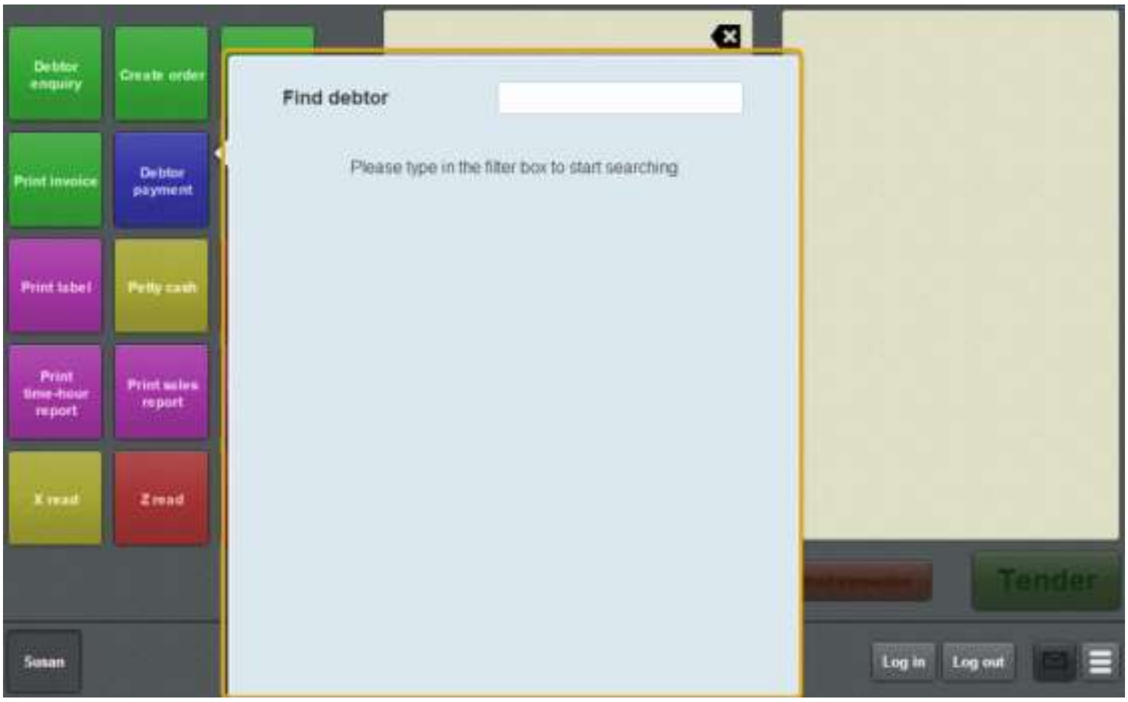
> **Note:** Debtor payments must be configured as one-shot buttons. See *Creating a one-shot button for debtor payments* on page 167.

To add a debtor payment to a transaction:

1. Press the **Debtor payment** one-shot button.

   > **Note:** Your one-shot button configuration may appear different to the documentation.

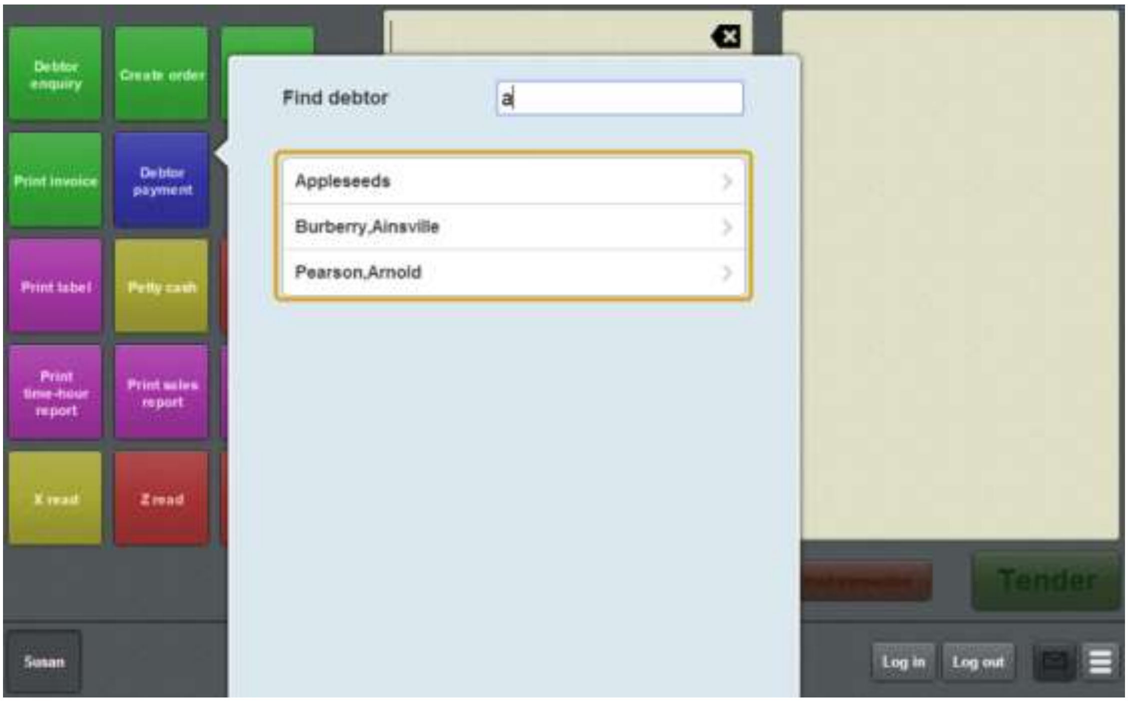
   The Find customer screen is displayed.



Please type in the filter box to start searching

2. Search for the debtor you want to process a payment for.

   See *Finding a customer* on page 541.



Find debtor: a

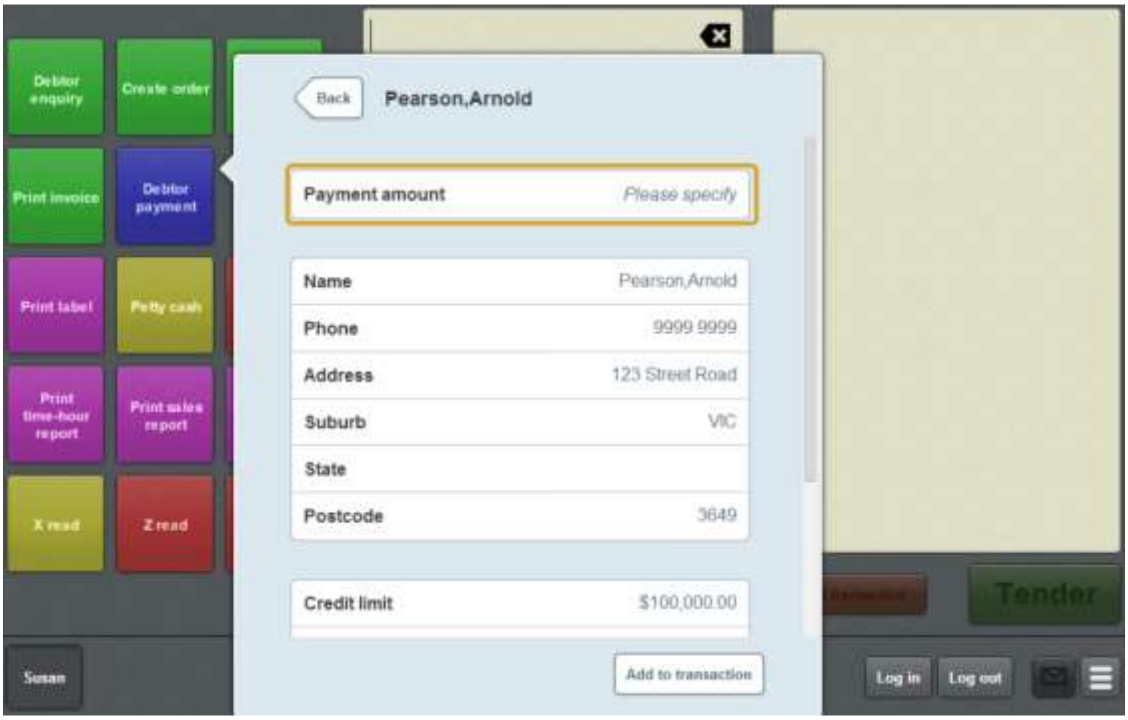
Appleseeds

Burberry,Ainsville

Pearson,Arnold

3. Press the appropriate debtor from the search results.

   The Debtor payment screen is displayed.



Pearson,Arnold

Payment amount: Please specify

Name: Pearson,Arnold

Phone: 9999 9999

Address: 123 Street Road

Suburb: VIC

State:

Postcode: 3649

Credit limit: $100,000.00

4. Press the **Payment amount** field.
5. Type in the amount the debtor wants to pay.

> **Tip:** The total amount owed on the debtor's account is displayed in the Balance field.

6. Press Add to transaction.

   The payment is added to the transaction.

7. Continue the transaction as normal.

   See *Selling and refunding items* on page 409.

Debtor details screen

Use the Debtor details screen to view a debtor's:

- address and contact details
- credit limit, current balance and available credit
- discounts and price levels.

You can also use the Debtor details screen to add a debtor to a transaction so they can:

- view the prices and discounts available to them
- pay for the transaction using their debtor account.

Note: Debtor details cannot be edited on the Point of Sale.

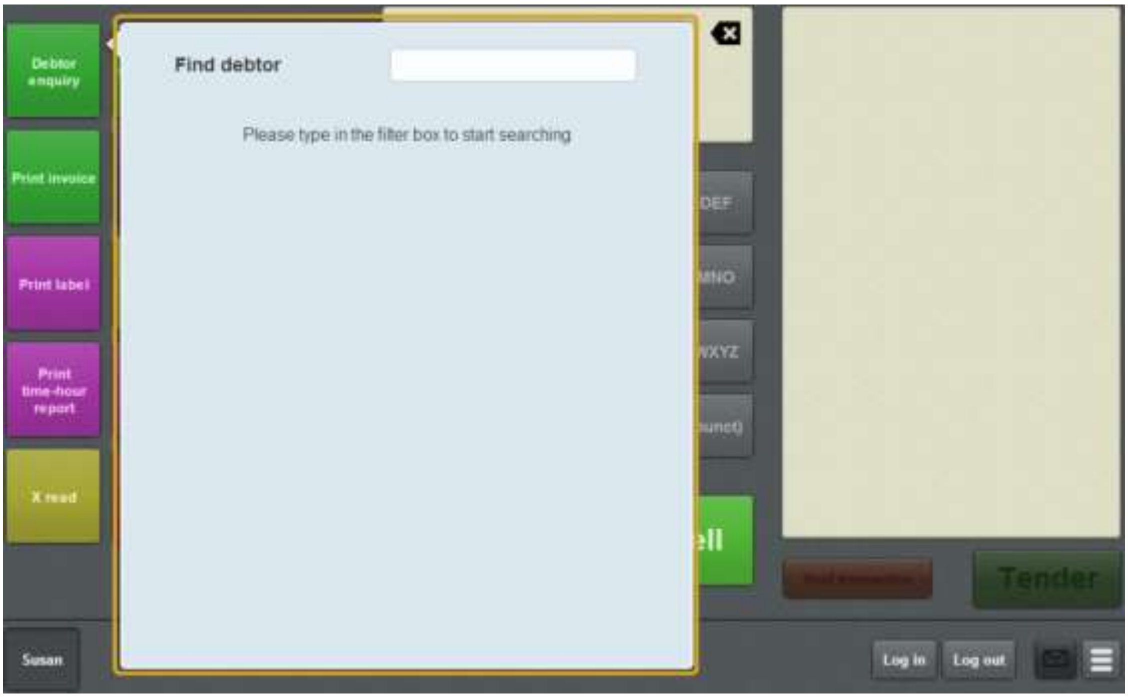
Opening the Debtor details screen

To open the Debtor details screen:

1. Press the **Debtor enquiry** one-shot button.

   Note: Your one-shot button configuration may appear different to the documentation.

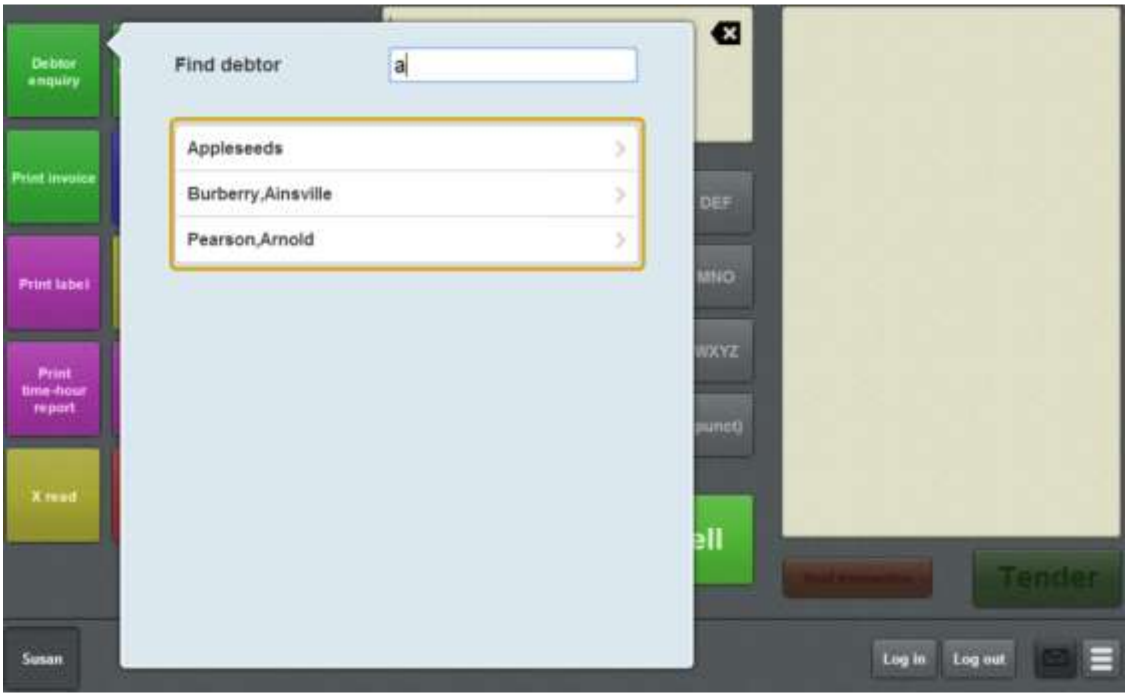
   The Find debtor screen is displayed.



Please type in the filter box to start searching

2. Search for the debtor you want to view.

   See *Finding a debtor* on page 585.

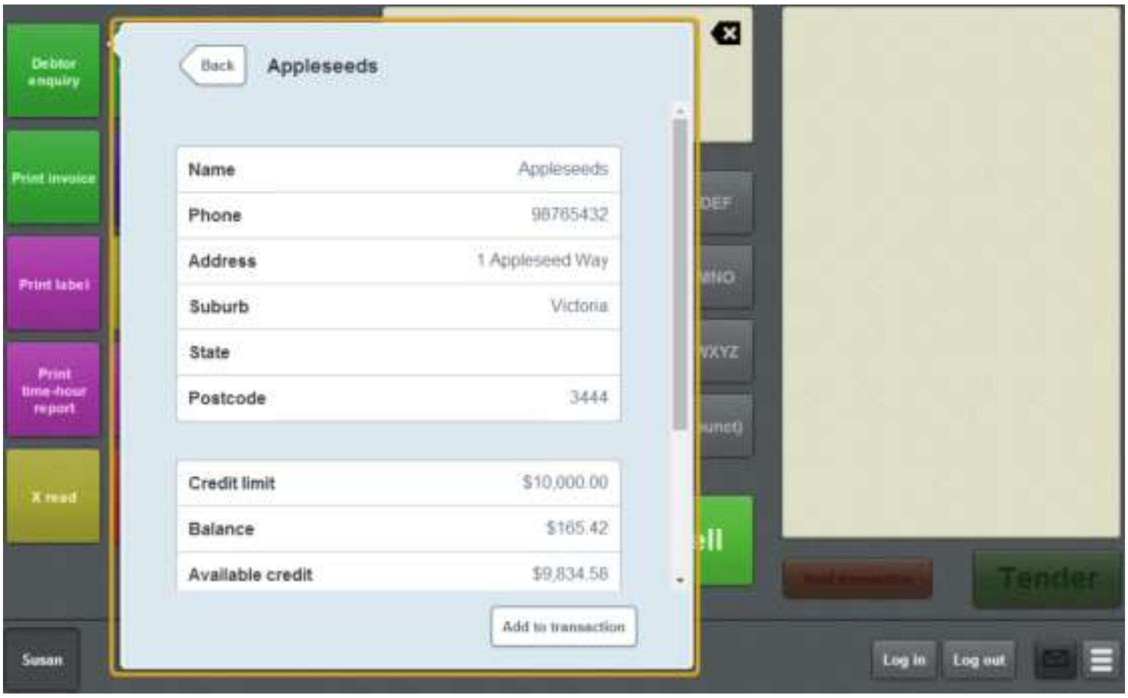


Find debtor: a

- Appleseeds
- Burberry,Ainsville
- Pearson,Arnold

3. Press the appropriate debtor from the search results.

   The Debtor details screen is displayed.



Appleseeds

Name	Appleseeds
Phone	98765432
Address	1 Appleseed Way
Suburb	Victoria
State	
Postcode	3444

Credit limit	$10,000.00
Balance	$165.42
Available credit	$9,834.58

Debtor details screen key fields and buttons

Note: These fields are not editable. Debtor information can only be edited on the Portal.

Field	Description
Name	The debtor's name.
Phone	The debtor's business phone number.
Address	The debtor's billing address.
Suburb	The debtor's billing address suburb.
State	The debtor's billing address state.
Postcode	The postcode of the debtor's billing address.
Credit limit	The maximum amount the debtor is allowed to owe your organisation at one time.
Balance	The amount the debtor currently owes your organisation.
Available credit	The amount the debtor is allowed to spend before they reach their credit limit.
Discount	The maximum discount the debtor is entitled to.
Price level	The price level the debtor is entitled to.

Field	Description
Set transaction price level	Select to enable the debtor's price level for item prices.
	Press to add this debtor to the current transaction. See *Adding a debtor to a transaction* on page 590.

Debtor payment screen

Use the Debtor payment screen to add a debtor's account payment to a transaction. See *Adding a debtor payment to a transaction* on page 593.

Note: Debtor details cannot be edited on the Point of Sale.

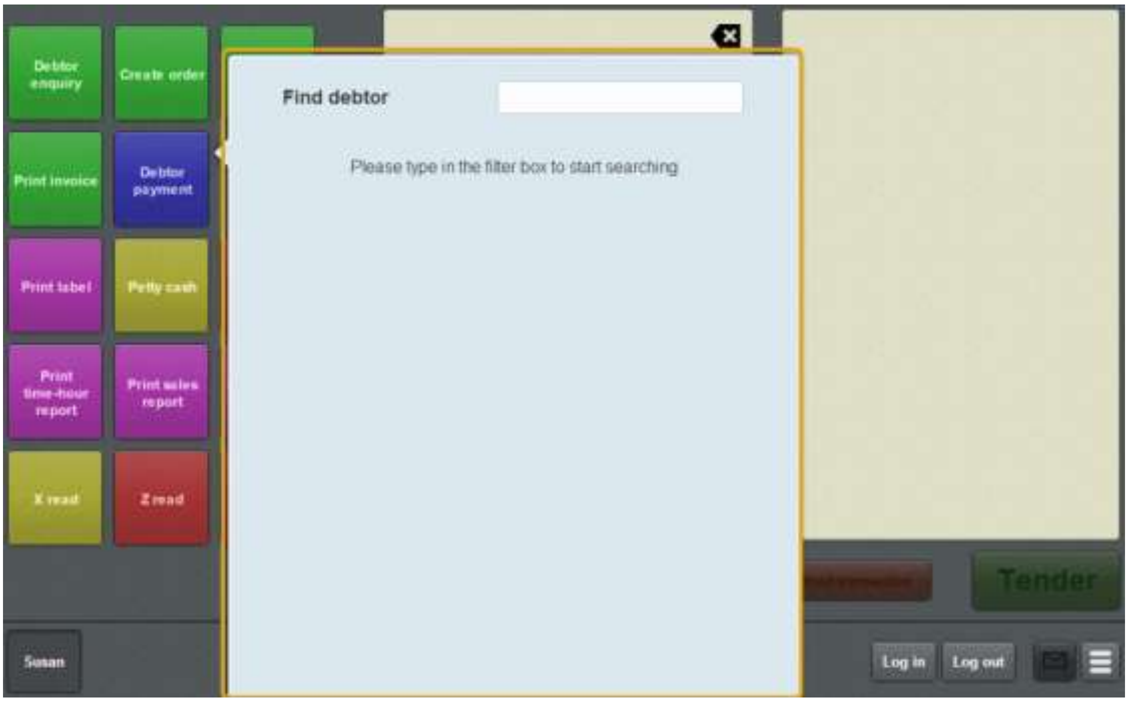
Opening the Debtor payment screen

To open the Debtor payment screen:

1. Press the **Debtor payment** one-shot button.

   Note: Your one-shot button configuration may appear different to the documentation.

   The Find debtor screen is displayed.



Find debtor

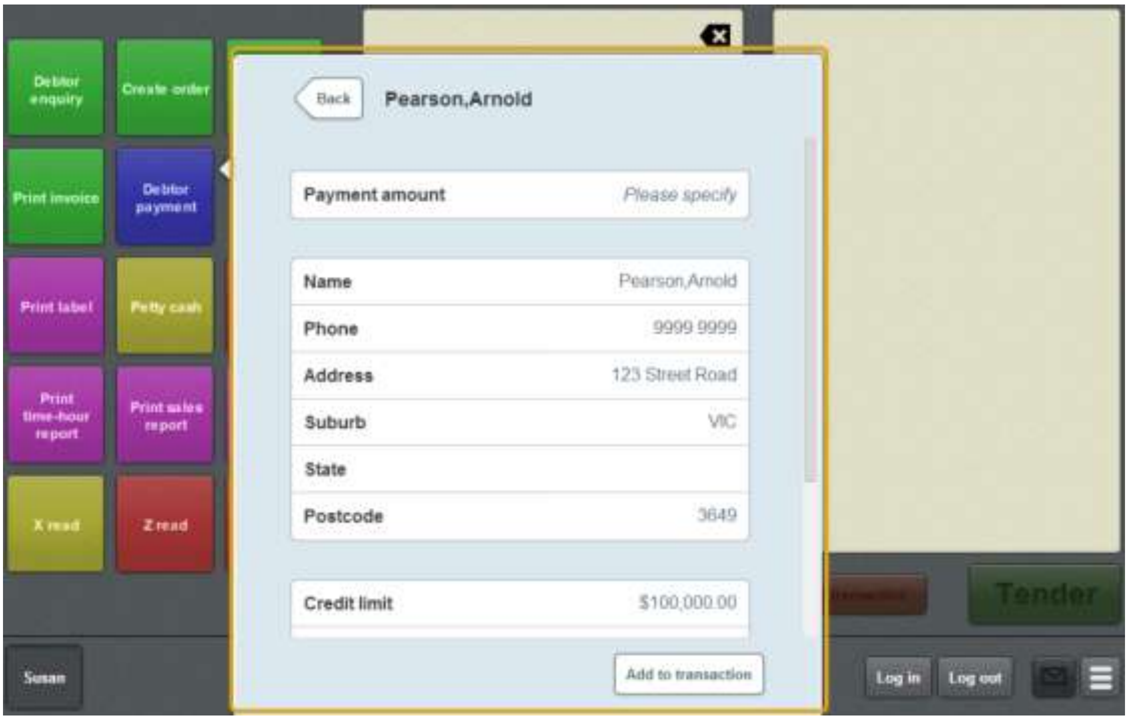
Please type in the filter box to start searching

2. Search for the debtor you want to view.

   See *Finding a debtor* on page 585.

3. Press the appropriate debtor from the search results.

   The Debtor payment screen is displayed.



Pearson,Arnold

Payment amount	Please specify
Name	Pearson,Arnold
Phone	9999 9999
Address	123 Street Road
Suburb	VIC
State	
Postcode	3649
Credit limit	$100,000.00

Debtor payment screen key fields and buttons

Note: These fields are not editable. Debtor information can only be edited on the Portal.

Field	Description
Payment amount	The amount to pay on the debtor account. See *Adding a debtor payment to a transaction* on page 593.
Name	The debtor's name.
Phone	The debtor's business phone number.
Address	The debtor's billing address.
Suburb	The debtor's billing address suburb.
State	The debtor's billing address state.
Postcode	The postcode of the debtor's billing address.
Credit limit	The maximum amount the debtor is allowed to owe your organisation at one time.
Balance	The amount the debtor currently owes your organisation.
Available credit	The amount the debtor is allowed to spend before they reach their credit limit.
Discount	The maximum discount the debtor is entitled to.

Field	Description
Price level	The price level the debtor is entitled to.
Set transaction price level	Select to enable the debtor's price level for item prices.
Add to transaction	Press to add this debtor to the current transaction. See *Adding a debtor to a transaction* on page 590.

Paying for external transactions

You can process payments for external transactions from the Scheduler or the Portal using the Point of Sale. The process for importing an external transaction into the Point of Sale is the same whether it's from the Portal or the Scheduler. Appointment details are managed by the Scheduler.

Key appointment concepts

Please see the *Glossary* on page 649 for information relating to the following terms:

Appointment	Scheduler	Transaction
Point of Sale	Terminal	Transaction list

Also see *Transaction screen* on page 455.

What you can do:

The following topics explain the tasks related to appointments:

- *Retrieving external transactions* on page 606.
- *Setting up external transaction payments on the Point of Sale* on page 43.

Retrieving external transactions

Retrieve an appointment or other external transaction to add the items it contains to the current transaction.

I can't void an imported item: External transactions cannot be removed from a transaction once added. If you have added an external transaction by mistake, or added the wrong external transaction, you must void the Point of Sale transaction and start over. See *Voiding a transaction* on page 453.

Note: The Point of Sale must be configured to enable external transactions. See *Setting up external transaction payments on the Point of Sale* on page 43.

To retrieve an external transaction:

1. Press the **Load external transaction** one-shot button.

(Walk-in customer) 27/10/2013, 9:00 AM to 9:15 AM	$159.00
Bob Bird 2/10/2013, 10:30 AM to 10:45 AM	$120.00
Julie Smith 1/10/2013, 11:00 AM to 11:00 AM	$105.00
(Walk-in customer) 1/08/2013, 9:00 AM to 9:30 AM	$140.00

Note: The **Load external transaction** button may appear differently on your Point of Sale. See *Setting up external transaction payments on the Point of Sale* on page 43.

The list of unpaid external transactions is displayed.

2. Press the external transaction you want to retrieve.

   The external transaction items are added to the Point of Sale transaction.

Ladies Cut - Restyle MtoF	$105.00
Ladies Cut - Trim	$10.00
Total:	$115.00

Note: Imported items are marked with the icon.

I can't edit the external transaction items: If you need to edit the external transaction details, you must void the transaction and edit the details in the Scheduler (for appointments) or Portal (for other external transactions). External transaction details cannot be edited in the Point of Sale.

3. Continue the transaction as normal. See *Selling and refunding items* on page 409.

Waiting tables

You can create a list of tables or a floor map to represent your tables to:

- Record dine in or take away orders.
- Send those orders to the kitchen.
- Process the table's transactions.

Note: If the terminal is offline, table service is not available. Orders sent to the kitchen are parked until the terminal is online again.

Note: You must configure your Point of Sale for table service before you can use the features. See *Setting up table service on the Point of Sale* on page 29

Dine in and take away

You can configure two types of table service, called dine in orders and take away orders. These two types of table service operate exactly the same way, but can be configured separately. If you don't want to use two different kinds, you can configure the Point of Sale to hide the second order type to avoid confusion.

See *Configuring transaction types* on page 32.

Table names, numbers and covers

You can configure the Point of Sale to record customer names, table numbers, and the number of people sitting at a table (covers). These configurations can be different for dine in or take away orders. Names, table numbers and covers are specified when a table order's first items are sent to the kitchen.

Key concepts

Please see the *Glossary* on page 649 for information relating to the following terms:

Cover
Finalise
Item
One-shot button
Point of Sale
Table
Terminal
Transaction
Transaction list

Also see *Select table screen* on page 630.

What you can do:

The following topics explain the tasks related to waiting tables.

Waiting tables

- *Selecting a table* on page 614.
- *Recording a table order* on page 611.
- *Sending orders to the kitchen* on page 620.
- *Adding to a table order* on page 618.
- *Moving a transaction to another table* on page 625
- *Cancelling a table order* on page 626.
- *Reprinting an order* on page 627.
- *Printing a bill for a table* on page 629.
- *Finalising a transaction* on page 466.
- *Setting up table service on the Point of Sale* on page 29.
- *Configuring transaction types* on page 32.

Recording a table order

Record a table order to:

- Select if the order is dine in or take away.
- Assign a customer to a table.
- Send a customer's requests to the kitchen.
- Combine the customer's orders into one transaction.
- Finalise the customer's transaction.

> **Note:** Your Point of Sale must be configured for waiting tables. See *Setting up table service on the Point of Sale* on page 29.

To record a table order:

1. Select the table by either:
    - Pressing the one-shot button that corresponds to the table where the customer is sitting.
    - Pressing the **Select table** one-shot button and selecting a table from the Free tables list.

    > **Note:** Your Point of Sale may have been configured to automatically assign tables. See *Configuring transaction types* on page 32.

    > **Note:** If your Point of Sale uses transaction types, either select the transaction type before selecting the table on the Free tables list, or use the dine in or take away one-shot buttons after you select the table. A transaction type cannot be changed once the order has been sent to the kitchen.

    See *Selecting a table* on page 614.

    The Transaction list displays the number of the selected table.

> **Note:** When you select a table, any active transaction is sent to the kitchen (if it is another table order) or parked (if it is a regular transaction). See *Sending orders to the kitchen* on page 620. Also see *Parking a transaction* on page 448.

> **How do I assign this transaction to a table?** If you forget to select a table, before adding items to a transaction, you can select the table in the normal way before sending items to the kitchen.

2. Add the items to the customer's order.

   See *Selling an item by unit* on page 414.

3. Add any additional options to items, if required.

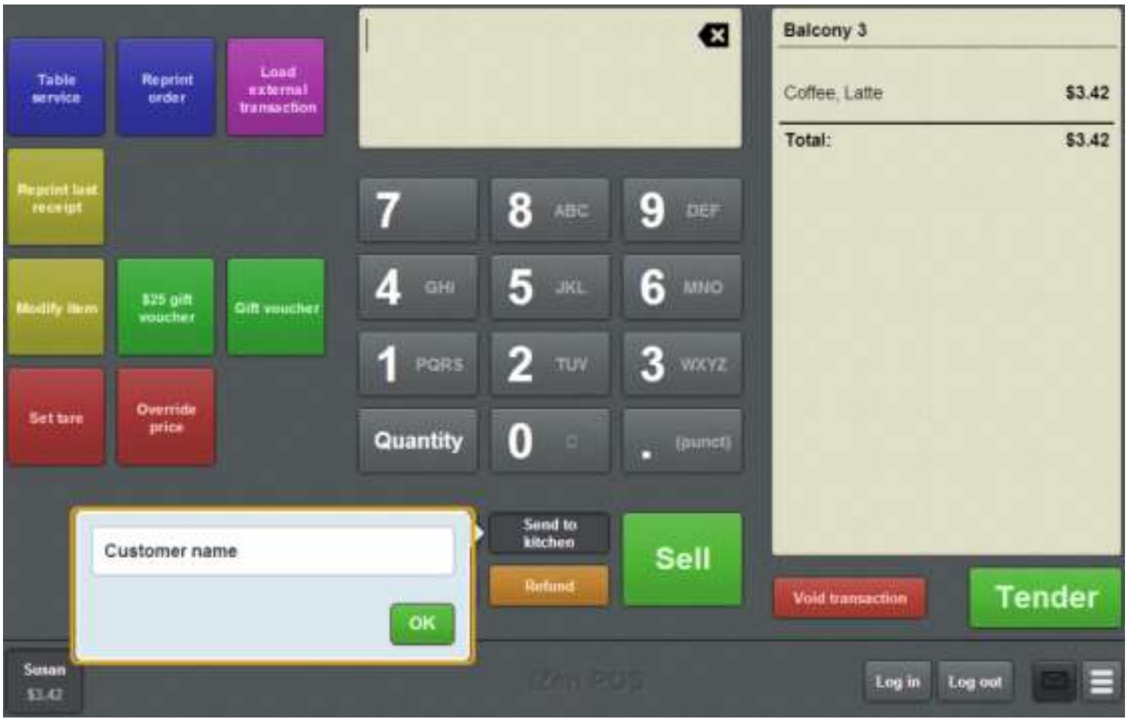
   See *Adding options to items* on page 432.

4. Send the order to the kitchen.

   See *Sending orders to the kitchen* on page 620.

> **Note:** Selecting another table automatically sends the current order to the kitchen.

If the Point of Sale is configured to collect customer names or covers, a popup screen is displayed to record these the first time items are sent to the kitchen from this order.



Customer name

Balcony 3	
Coffee, Latte	$3.42
Total:	$3.42

Tip: You can type in a ticket number or table number instead of a customer name if your company prefers to use floating table service numbers.

Note: This screen is only displayed if there are items in the table order.

5. Type a name to identify the customer's table.

Tip: If the customer wants to add to their order at a later point, you can select their table, add the items and send their order to the kitchen. See *Adding to a table order* on page 618.

6. When the customer is ready to pay, select their table and finalise the transaction. See *Finalising a transaction* on page 466.

   The table order is complete.

   The table is cleared for the next customer.

   The Point of Sale is ready for a new transaction.

Selecting a table

There are three ways to select a table for table service, depending on your Point of Sale configuration:

- You select a table from a layout of tables made with one-shot buttons.
- You select a table from a list of tables on the Select table screen.
- Tables are automatically assigned by the Point of Sale when you type in the customer's name.

If you need to select a table:

1. Press the one-shot button that corresponds to the table layout or table list.
2. Press the button that corresponds to the table you want to select.

To select or change the transaction type, press the one-shot button that corresponds to the transaction type.

You can select the transaction type and table in either order, but the transaction type cannot be changed once items have been sent to the kitchen for that order.

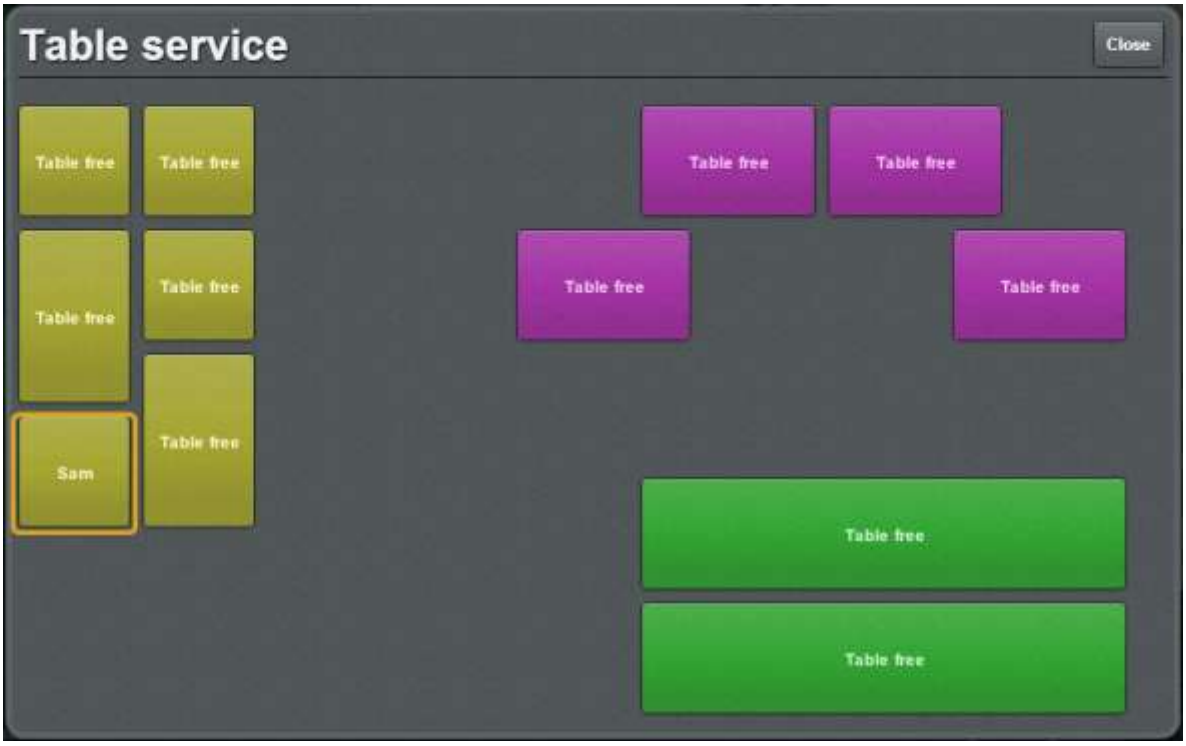
Tip: If you are selecting a table from the Select table list and **Enable transaction type selection** is enabled in the Miscellaneous tab of your Terminal setup screen, you can also use the dine in and take away buttons on the Select table screen to choose the transaction type. See *Terminal setup screen - Miscellaneous tab* on page 72.

Note: If you do not want to use more than one transaction type, you can avoid having to select the type by configuring the Point of Sale to default to your chosen type and hide the transaction type buttons on the table list page.

You can configure your Point of Sale to allow both table selection methods. Any free or active table can be correctly selected by either method.

Selecting a table via a layout of one-shot buttons

If you want to represent your table layout for table selection, you can configure a one-shot button for each table, and position the buttons on a one-shot button page to mimic your table layout.



If you use a table-layout selection process and you want to be able to select a dine in or take away transaction type, you must also create one-shot buttons to choose either dine in or take away. These buttons can be placed on the same one-shot button page as the table layout.

To configure your Point of Sale to select tables this way, see:

- *Creating a one-shot button to open a one-shot button page* on page 126.
- *Creating a one-shot button to retrieve a table* on page 257
- *Creating a one-shot button to set a transaction type* on page 291.

Selecting a table via a list of tables in the Select table screen

If you want to select tables from a list of tables, you can configure a one-shot button to open a list of all your tables, sorted by whether the tables are free or currently occupied (active). Use the **Free tables** and **Active tables** buttons to switch between the two lists.

This has the advantage of not having to configure a separate one-shot button for each table, but you cannot directly control the order in which the tables are displayed, the colour of the buttons, or add any non-table buttons to the page.

> **Note:** If you have configured one-shot buttons to select a specific table, the Point of Sale uses the colour of the button you configured for that table on the Select table screen.

You can configure the table list page to hide or display the dine in and take away buttons used to select a table service transaction type. You can also configure one-shot buttons to select the transaction type on a different one-shot button page or the main screen.

To configure your Point of Sale to select tables from a table list, see:

- *Creating a one-shot button to select a free or active table* on page 286.
- *Creating a one-shot button to set a transaction type* on page 291

Selecting a table when sending to the kitchen

If either dine in or takeaway transaction type is selected, and a table has not been assigned when the order is first sent to the kitchen, the Point of Sale prompts the operator to select a table using the Select table screen.

You can use this feature if you do not want to create one-shot buttons to select tables.

Note: If the Point of Sale is configured to automatically assign a table, but there is no table available in the range, the Select table screen is displayed for the operator to assign a table.

Adding to a table order

Add to a table order when the customer has an existing table order and wants to add more items.

To add to a table order:

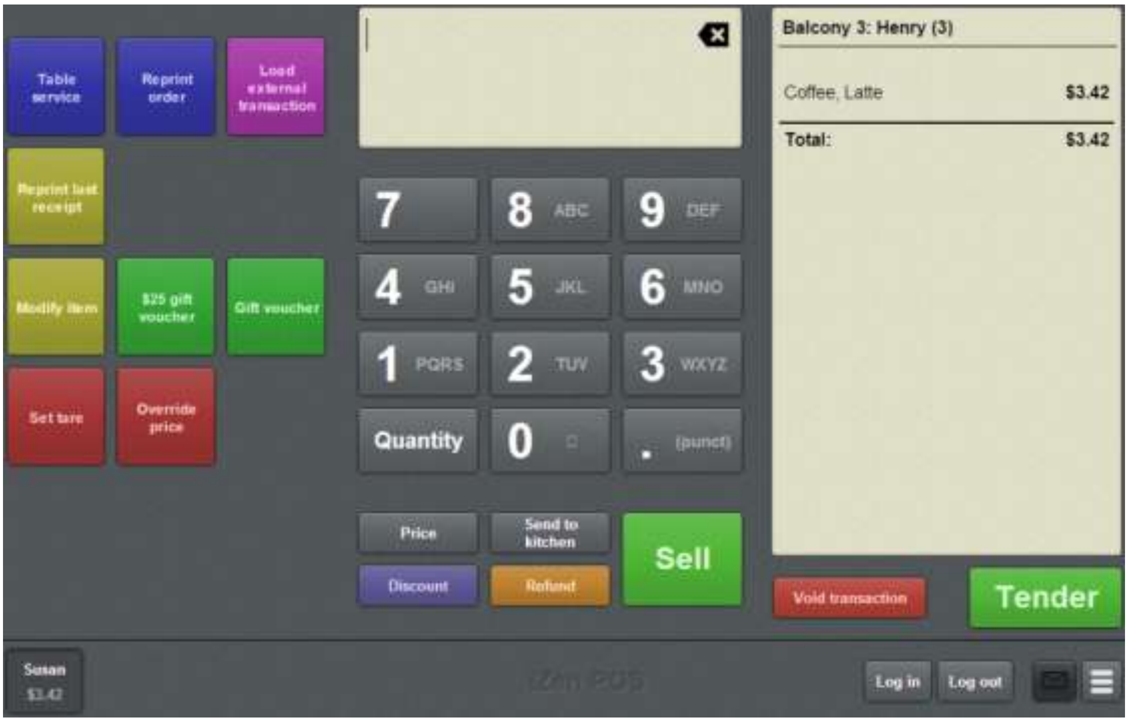
1. Select the table by either:
    - Pressing the one-shot button that corresponds to the table where the customer is sitting.
    - Pressing the **Select table** one-shot button and selecting a table from the Free tables list.

    > **Note:** Your Point of Sale may have been configured to automatically assign tables. See *Configuring transaction types* on page 32.

    > **Note:** If your Point of Sale uses transaction types, either select the transaction type before selecting the table on the Free tables list, or use the dine in or take away one-shot buttons after you select the table. A transaction type cannot be changed once the order has been sent to the kitchen.

    See *Selecting a table* on page 614.

    The customer's order is displayed in the Transaction list.



Balcony 3: Henry (3)

Coffee, Latte	$3.42
Total:	$3.42

Susan
$3.42

2. Add the items of the customer's order.

See *Selling an item by unit* on page 414.

3. Add any additional options to items, if required.

   See *Adding options to items* on page 432.

4. If the customer wants to:

   - Order more items at a later point, send the order to the kitchen.

     See *Sending orders to the kitchen* on page 620.

   - Pay for their order, finalise the transaction.

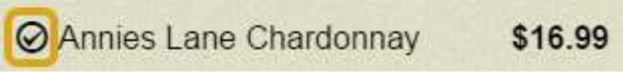
     See *Finalising a transaction* on page 466.

     Note: Finalising the transaction also sends the order to the kitchen, if there are items that have not yet been sent.

Sending orders to the kitchen

Send an order to the kitchen when you need to process an order without finalising the transaction. For example, if the customers want to order drinks while they decide their meal order. Each item that has not yet been sent to the kitchen is sent to the remote printer that is configured for the item on the Portal.

Tip: Items that have already been sent to the kitchen are identified with a tick symbol.



Annies Lane Chardonnay $16.99

Note: You must have a table selected and items in the transaction before you can send the order to the kitchen. Sending an empty table order to the kitchen cancels the table selection. See *Recording a table order* on page 611.

Note: Your Point of Sale must be configured for waiting tables. See *Setting up table service on the Point of Sale* on page 29.

To send a table order to the kitchen:

1. On the Transaction screen, press the one-shot button that corresponds to the table where the customer is sitting.
2. Add the items of the customer's order.

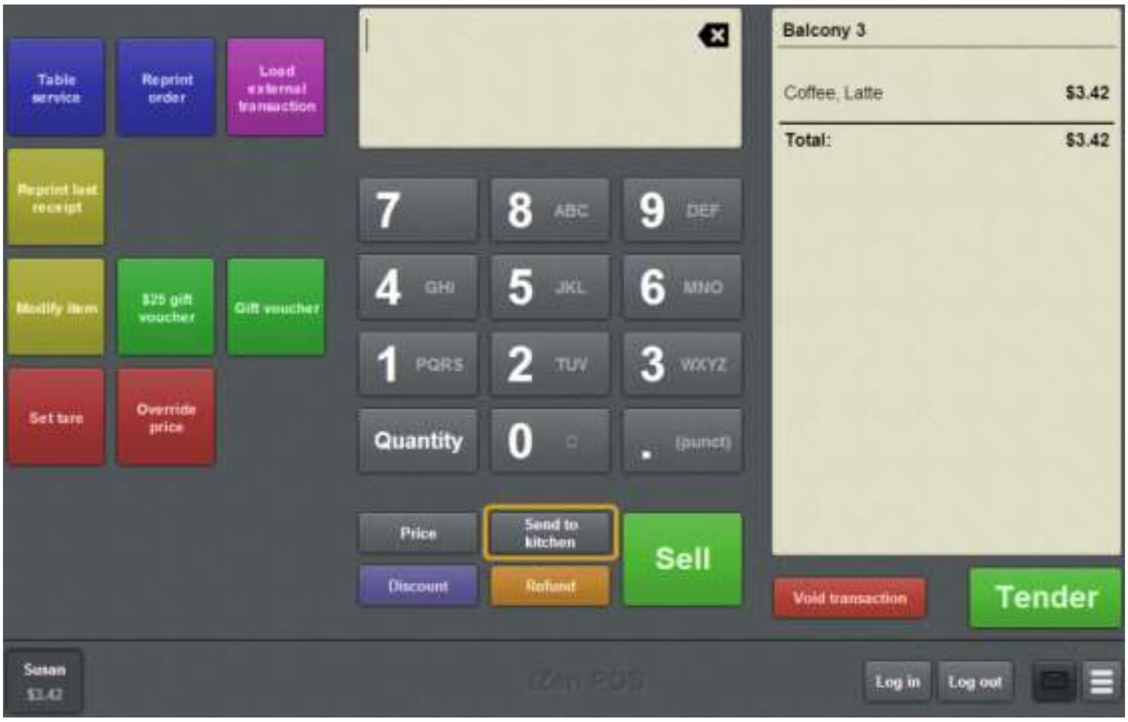
   See *Selling an item by unit* on page 414.

   Note: You can't send an empty order to the kitchen.

3. Add any additional options to items, if required.

   See *Adding options to items* on page 432.

4. Press  .

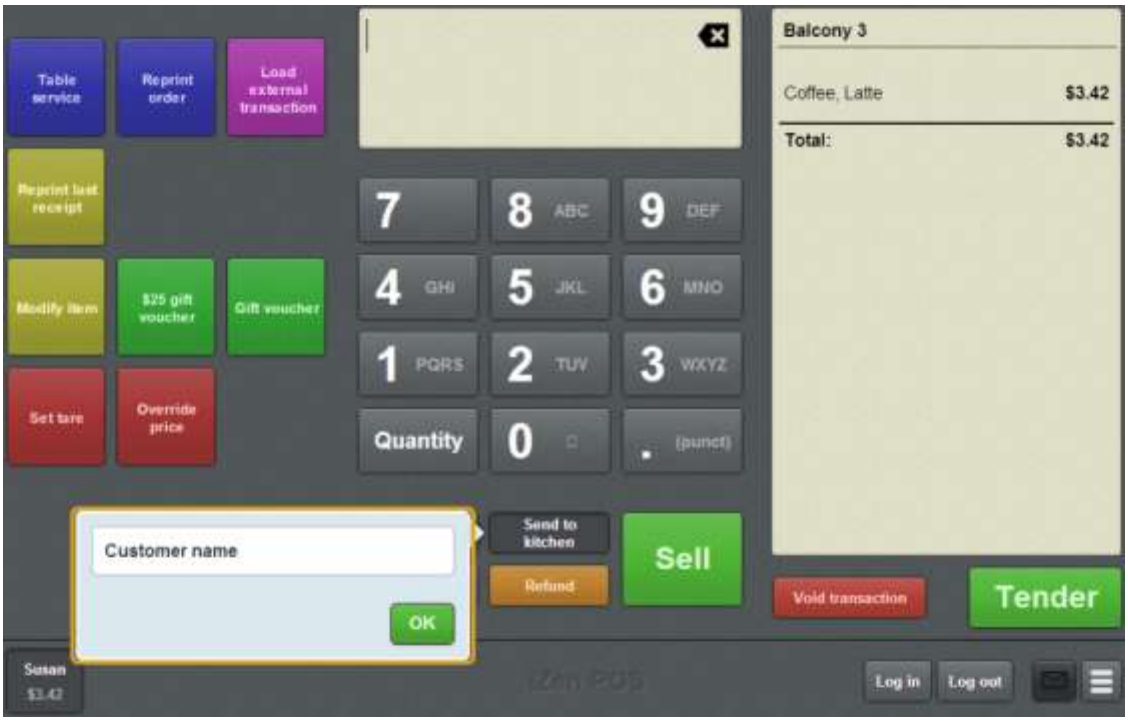


Balcony 3

Coffee, Latte $3.42

Total: $3.42

5. If your Point of Sale is configured to collect customer names or covers and this customer has not already placed an order in this transaction, a popup screen is displayed.



Balcony 3

Coffee, Latte $3.42

Total: $3.42

6. Type the required information.

7. Press OK.

The order is sent to the kitchen.

The Transaction screen is ready for the next transaction.

Editing a table order

Edit a table order when the customer has an existing table order and wants to change the quantity or modification of an item that has already been sent to the kitchen.

> **Note:** Items that have not been sent to the kitchen can be edited as normal. Items that have been sent to the kitchen must be voided and re-ordered to ensure the kitchen is properly notified of the change.

To edit a table order:

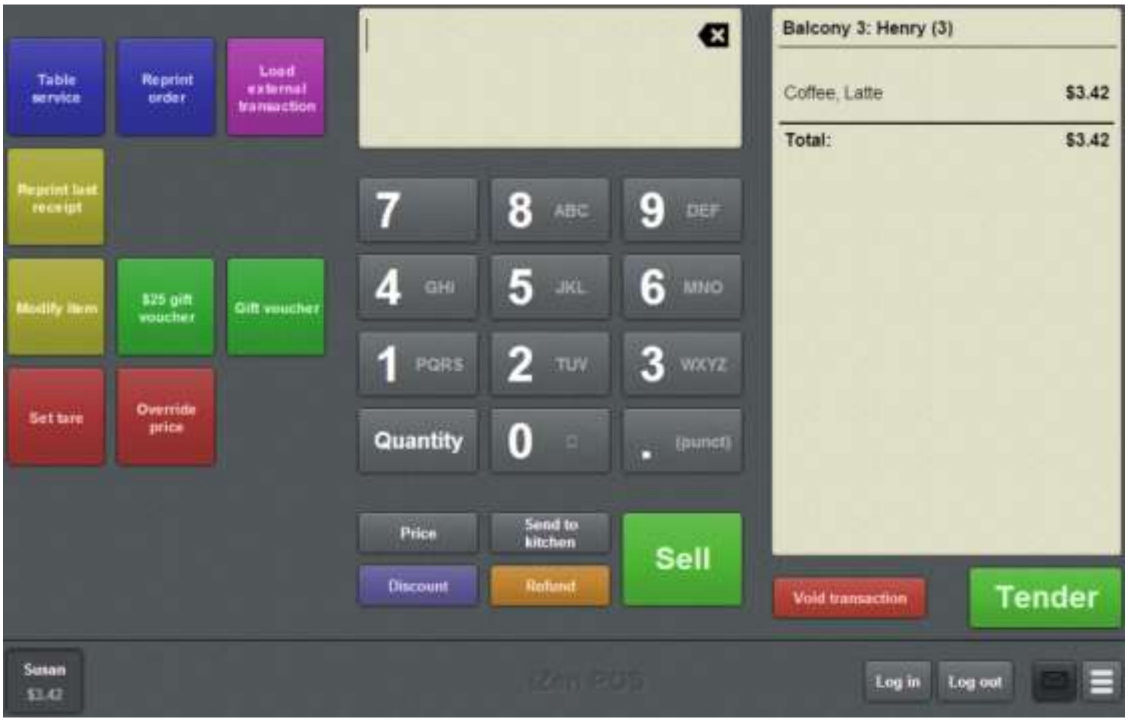
1. Select the table by either:
    - Pressing the one-shot button that corresponds to the table where the customer is sitting.
    - Pressing the **Select table** one-shot button and selecting a table from the Free tables list.

    > **Note:** Your Point of Sale may have been configured to automatically assign tables. See *Configuring transaction types* on page 32.

    > **Note:** If your Point of Sale uses transaction types, either select the transaction type before selecting the table on the Free tables list, or use the dine in or take away one-shot buttons after you select the table. A transaction type cannot be changed once the order has been sent to the kitchen.

    See *Selecting a table* on page 614.

   The customer's order is displayed in the Transaction list.



Balcony 3: Henry (3)

Coffee, Latte	$3.42
Total:	$3.42

2. Select and void the item you want to change.

   See *Voiding an item* on page 451.

3. Add the item back to the order.

   See *Selling an item by unit* on page 414.

4. Add any additional options to item, if required.

   See *Adding options to items* on page 432.

5. If the customer wants to:

   - Order more items at a later point, send the order to the kitchen.

     See *Sending orders to the kitchen* on page 620.

   - Pay for their order, finalise the transaction.

     See *Finalising a transaction* on page 466.

> **Note:** Finalising the transaction also sends the order to the kitchen, if there are items that have not been sent.

Moving a transaction to another table

Move a table when you want to assign a transaction to another free table. The kitchen is notified of the change, and any items ordered after the move are assigned to the new table.

> **Note:** You can only move a transaction to a free table. You cannot use this feature to combine two table transactions.

> **Note:** You must configure a one-shot button to move a table. See *Creating a one-shot button to move a transaction to another table* on page 187.

To move a transaction to another table:

1. Select the transaction you want to move.

   See *Selecting a table* on page 614.

2. Press the Move table one-shot button.

   The Select table screen is displayed.

3. Press the button corresponding to the table you want to move the transaction to.

   The transaction is moved.

Cancelling a table order

Cancel a table order when you have selected the wrong table by mistake, or accidentally started table service on your terminal.

> **Note:** If you have added items to the order, you must either void those items or void the transaction to cancel the order. See *Voiding an item* on page 451. Also see *Voiding a transaction* on page 453.

To cancel a table order:

1. Void any items in the transaction that have not already been sent to the kitchen.

   > **Note:** If there are any new items in the transaction, the items are automatically sent to the kitchen by this process.

2. You can:
   - Press another table one-shot button to switch to that table instead.
   - Press **Send to kitchen** to cancel the table service mode and return to the normal Transaction screen.


Balcony 3
Coffee, Latte $3.42
Total: $3.42

Reprinting an order

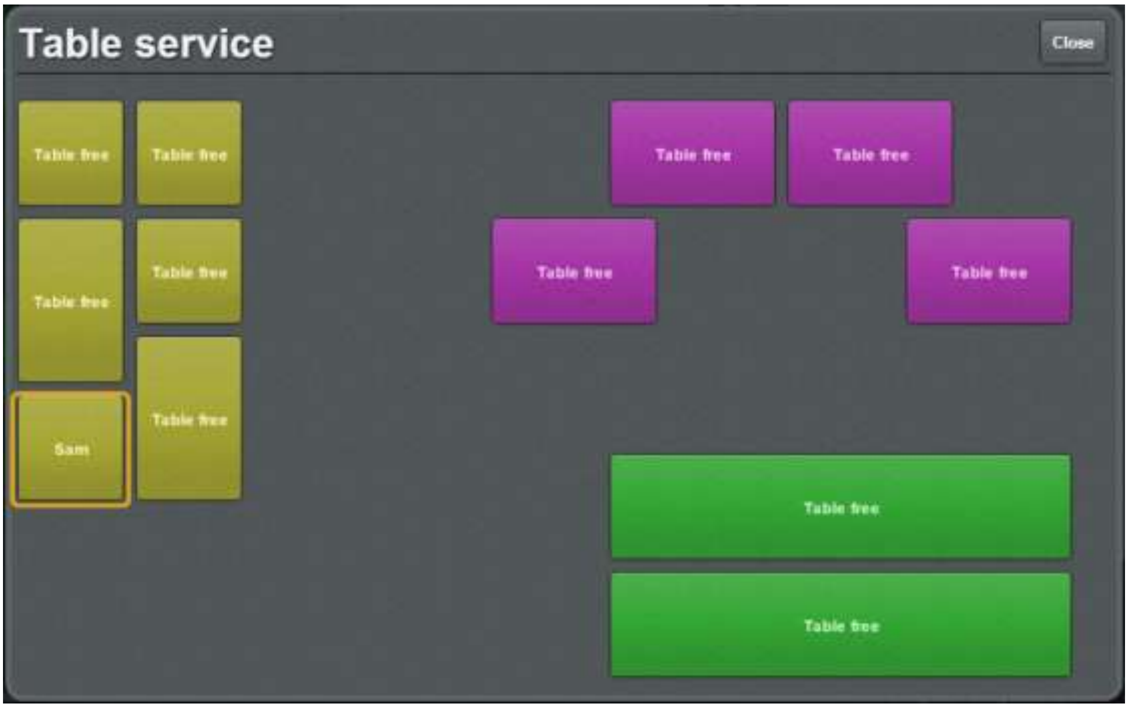
You can reprint a table order from the Transaction screen.

> **Note:** You must have a one-shot button configured to reprint a table order. See *Creating a one-shot button to reprint orders* on page 249.

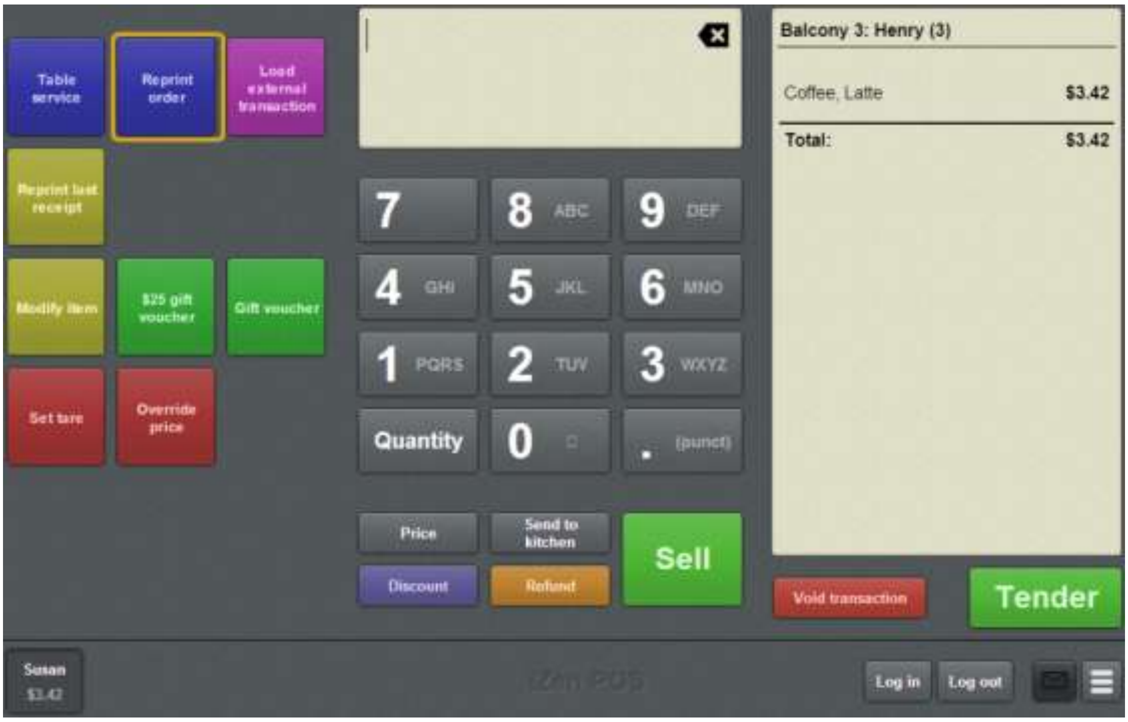
To reprint a table order:

1. Press the one-shot button representing the table that you want to reprint the order for.

   > **Note:** Your one-shot button configuration may be different to the documentation.



2. Press the **Reprint order** one-shot button.



Balcony 3: Henry (3)

Coffee, Latte	$3.42
Total:	$3.42

The table order is reprinted.

Printing a bill for a table

Print a bill for a table to present them with an itemised receipt including total amount owed prior to payment.

> **Note:** You must configure a one-shot button to print a table bill. See *Creating a one-shot button to print a table bill* on page 233.

To print a bill for a table:

1. Press the **Print bill** one-shot button.

   The Select table screen is displayed.

2. Select the table you want to print a bill for.

   See *Selecting a table* on page 614.

   The bill is printed.

Select table screen

Use the table selection screen to find and select a free or active table for table service.

> **Note:** To open the Select table screen, you must have configured a one-shot button. See *Creating a one-shot button to select a free or active table* on page 286.

Opening the Select table screen

To open the Select table screen:

1. Press the **Select table** one-shot button.

   The Select table screen is displayed.

For more information, see *Selecting a table* on page 614.

Select table select screen key fields and buttons

Field	Description
	Press to display only tables that are not currently occupied by a customer.

Field	Description
	Press to display only tables that are currently occupied by a customer.
	Press to close the Select table screen.
	Press to select the Dine in or Take away table order type for the next table you select. These two buttons function as a toggle: the button that is selected is the order type used for the next table order. **Note:** Table order types cannot be changed once an order has been sent to the kitchen. **Note:** These buttons only appear if the **Enable table type selection** field is selected in the Miscellaneous tab of Terminal setup screen.
	Press to select a table to create or retrieve a table order.

Field	Description
	Type to search for a table by its name or code.
	Press to close the Select table screen.

Site reports

Print site reports to review the sales and takings information for your site. Different reports represent and summarise the information in different ways. All site reports pertain to a specified calendar day and are printed from the terminal's receipt printer.

Key concepts

Advance
Barcode
Base station
Cash-drawer
Customer
Discount
Handover
Invoice
Item
Label
No sale
One-shot button
Operator
Receipt
Sales report
Site
Takings report
Time-hour report
Transaction
X read
Z read
ZZ read

What you can do:

- *Printing a time-hour report* on page 638.
- *Printing a sales report* on page 634.
- *Printing a takings report* on page 636.
- *Printing the day's receipts* on page 640.

Also see:

- *Printing a label for an item sold by unit* on page 364.
- *Printing an invoice* on page 557.
- *Performing an X read* on page 383.
- *Performing a Z read* on page 385.
- *Performing a ZZ read* on page 386.

Printing a sales report

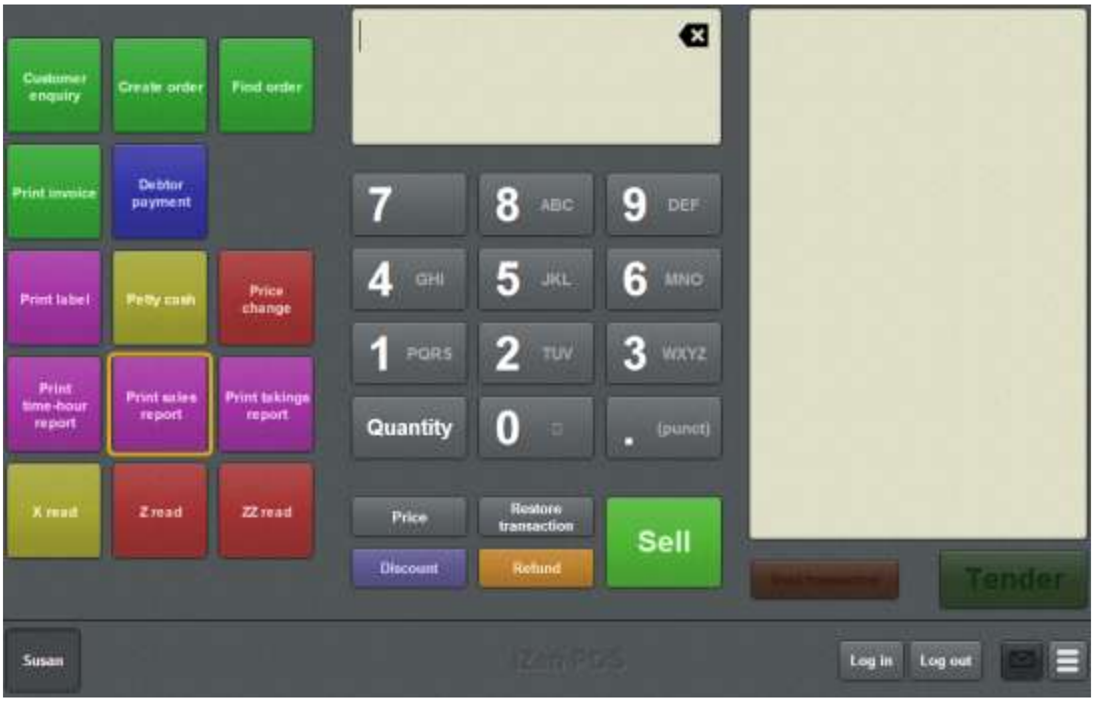
Print a sales report from the terminal's receipt printer to summarise the transaction information for a selected date, including:

- Takings by tender type and total number of transactions.
- Takings by department type, and total number of items sold in each department.
- Takings per item, transactions including that item and quantity of each item sold.
- Number of transactions by operator and cash-drawer, and quantity of each item sold by each operator.

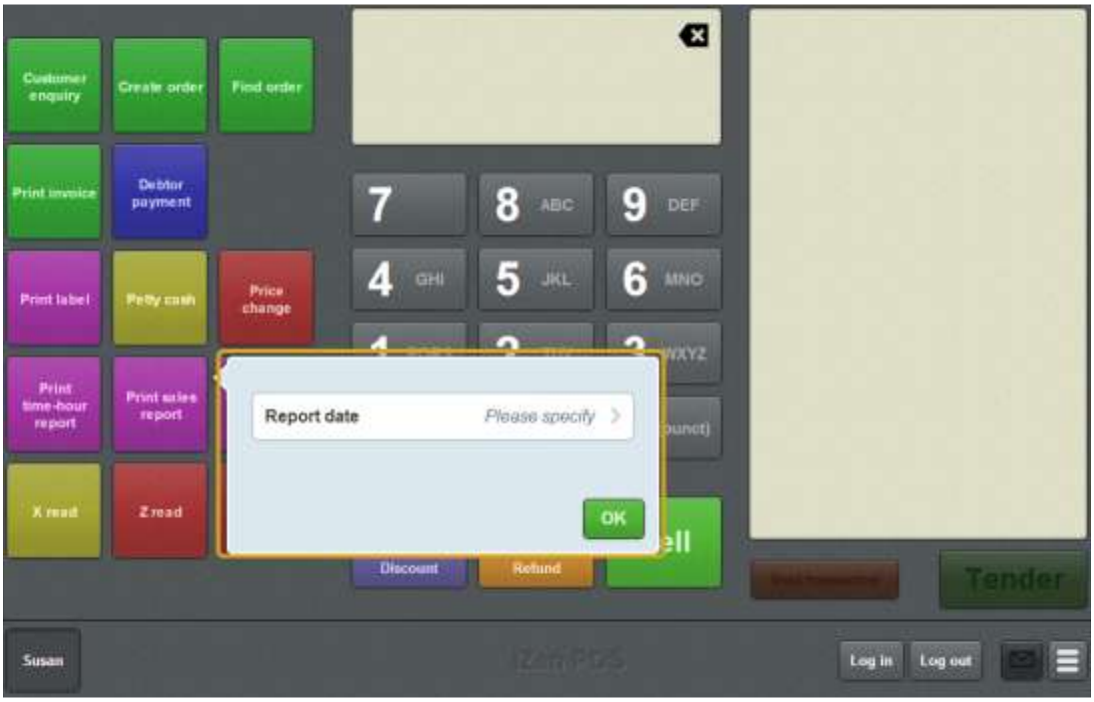
To print a sales report:

1. Press the **Print sales report** one-shot button.

> **Note:** Your one-shot button configuration may be different to the documentation.



The Report date screen is displayed.



Report date *Please specify*

2. Press **Report date**.
3. Select the date you want to print a report for.
4. Press OK.
5. The report is printed.

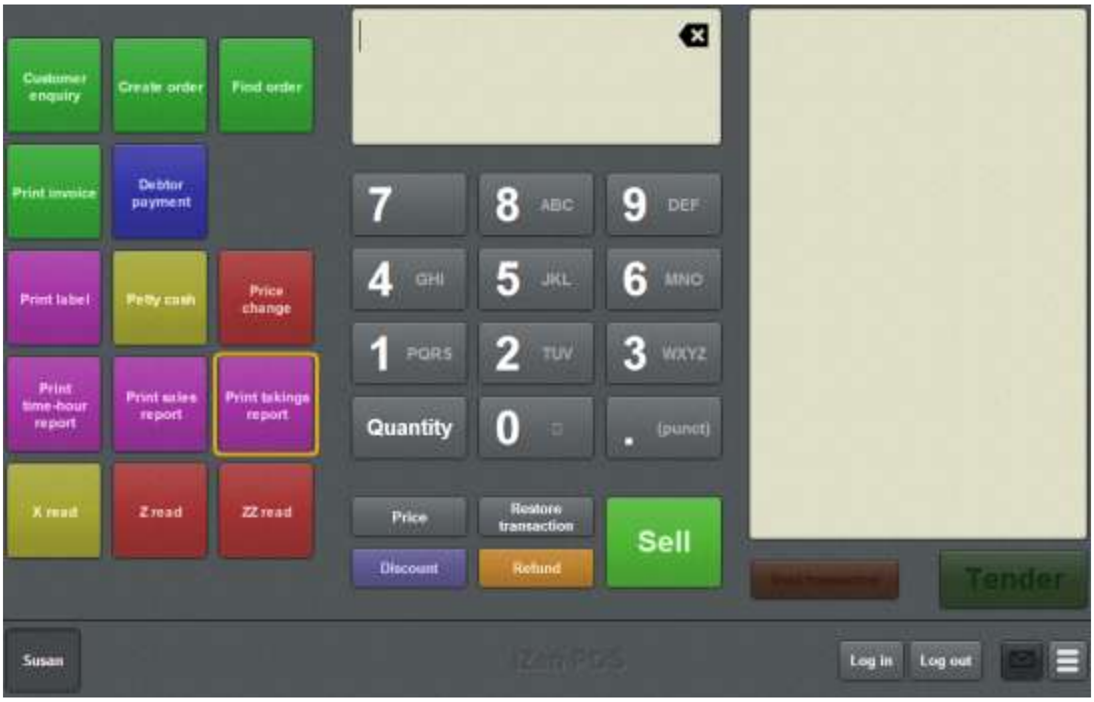
Printing a takings report

Print a takings report from the terminal's receipt printer to summarise the site's takings for a date by tender type and total number of transactions.

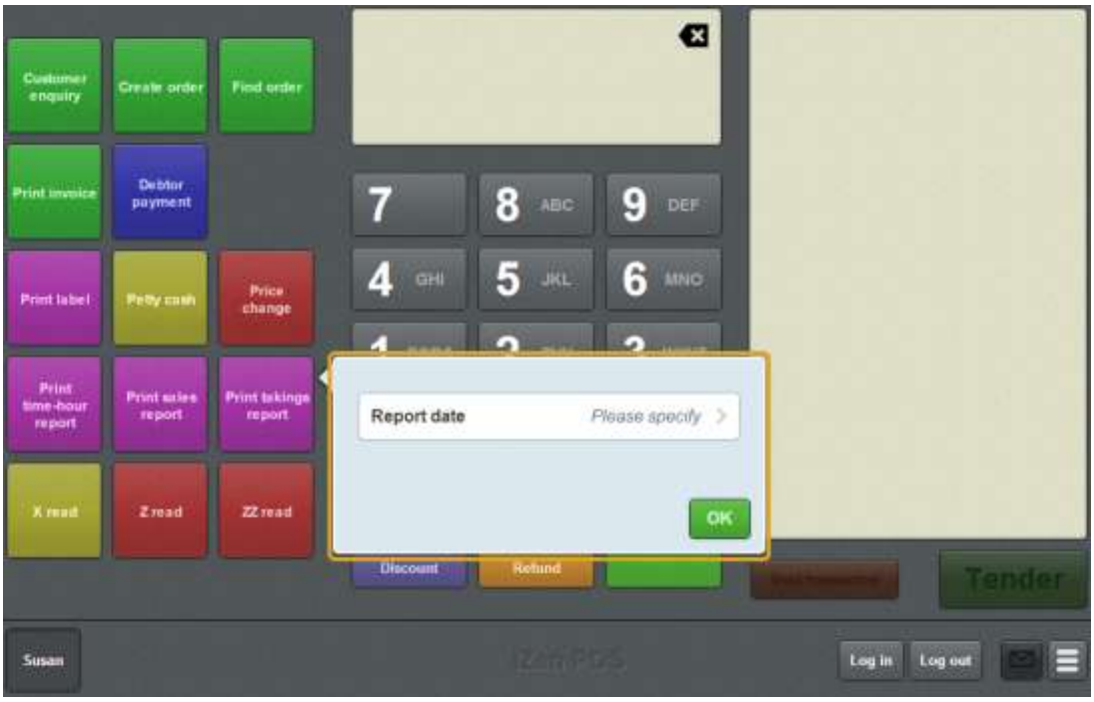
To print a takings report:

1. Press the **Print takings report** one-shot button.

> **Note:** Your one-shot button configuration may be different to the documentation.



The Report date screen is displayed.



Report date Please specify

2. Press **Report date**.
3. Select the date you want to print a report for.
4. Press OK.
5. The report is printed.

Printing a time-hour report

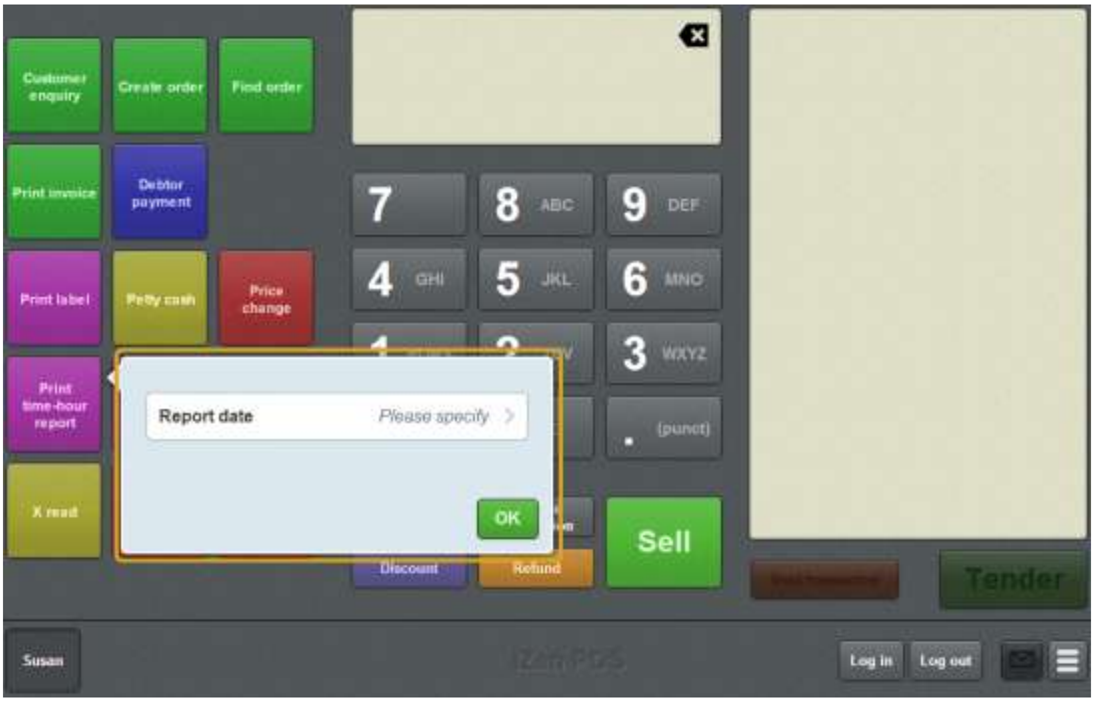
Print a time-hour report from the terminal's receipt printer to summarise the site's takings for a date by tender type and total number of transactions, and see the sales and transactions per hourly block.

To print a time-hour report:

1. Press the **Print time-hour report** one-shot button.

> **Note:** Your one-shot button configuration may be different to the documentation.

The Report date screen is displayed.



Report date Please specify

2. Press **Report date**.
3. Select the date you want to print a report for.
4. Press OK.
5. The report is printed.

Printing the day's receipts

Print the day's receipts if you want copies of all transactions from a specific day.

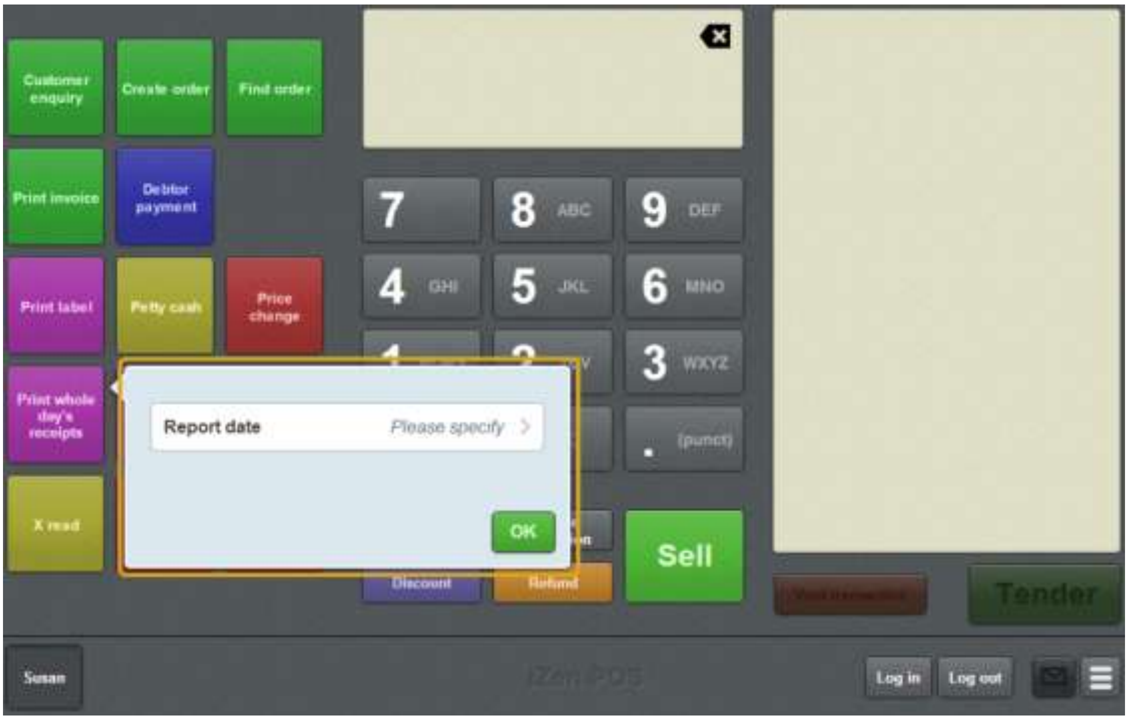
> **Note:** You must have a one-shot button configured to print the day's receipts. See *Creating a one-shot button to print the day's receipts* on page 282.

To print the day's receipts:

1. Press the **Print whole day's receipts** one-shot button.

   > **Note:** Your one-shot button configuration may be different to the documentation.

   The Report date screen is displayed.



2. Press **Report date**.
3. Select the date you want to print a the receipts for.
4. Press OK.

   The receipts are printed.

Appendix

The following topics contain more information on aspects of the iZen Point of Sale:

- *Scales certification compliance mode* on page 644.
- *Philippines tax compliance* on page 645.

Scales certification compliance mode

The iZen Point of Sale is, where required by law, certified for the selling of items by weight. The Scales certification compliance mode makes a cosmetic change to the iZen Point of Sale in line with the certification requirements of the relevant legal authority.

Note: Please contact AMC Convergent IT or your software supplier if you require confirmation of the relevant certification.

Note: Compliance modes are configured on the Portal, and cannot be changed on the Point of Sale.

If your Point of Sale is in Scales certification compliance mode:

- The Item field on the Transaction screen extends to the right of the screen, as if the **Use large display** field was selected in the Miscellaneous tab of the Terminal setup screen.

- The compliance certification number is clearly displayed with the version and build details in the Registration tab of the Terminal setup screen.
- The type of compliance mode is displayed in the Registration tab of the Terminal setup screen.

All other features and functions of the Point of Sale remain the same.

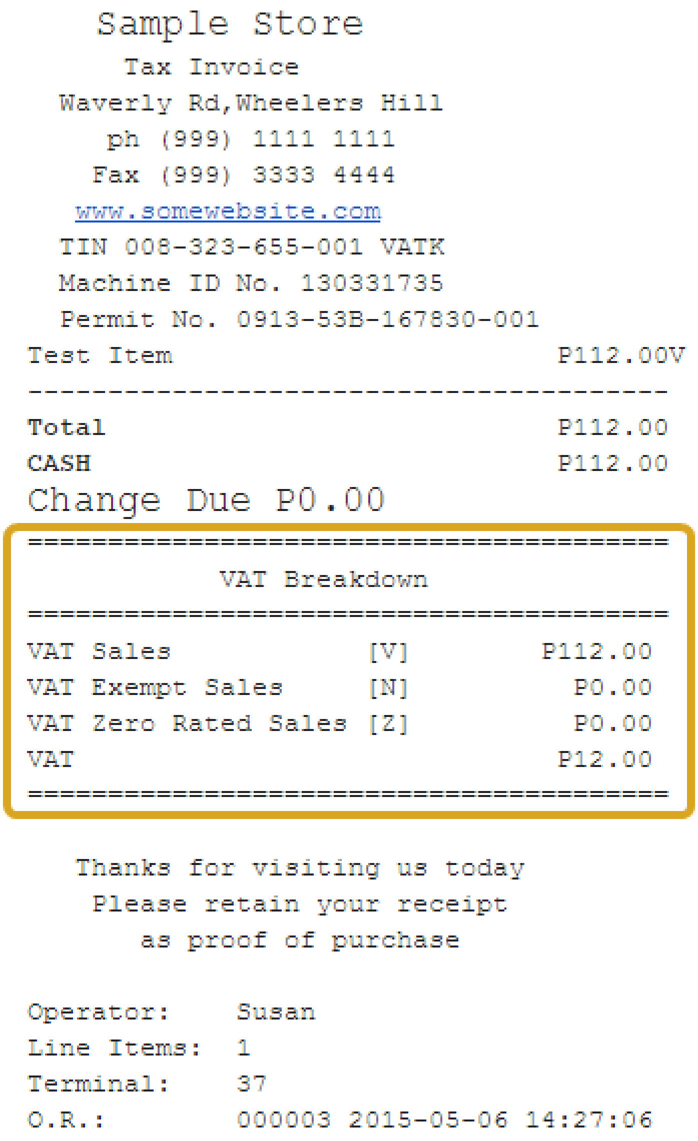
Philippines tax compliance

When configured for Philippines tax compliance, the iZen Point of Sale printed receipts include the tax calculation breakdown required by the Philippines' Bureau of Internal Revenue (BIR).

Note: Compliance modes are configured on the Portal, and cannot be changed on the Point of Sale.

When your Point of Sale is in Philippines tax compliance, receipts include a tax breakdown of:

- The total amount of VAT-applicable sales.
- The total amount of VAT-exempt sales.
- The total amount of VAT Zero Rated sales.
- The total amount of VAT.



```
      Sample Store
        Tax Invoice
    Waverly Rd,Wheelers Hill
       ph (999) 1111 1111
      Fax (999) 3333 4444
     www.somewebsite.com
    TIN 008-323-655-001 VATK
    Machine ID No. 130331735
    Permit No. 0913-53B-167830-001
  Test Item                        P112.00V
  ----------------------------------------
  Total                            P112.00
  CASH                             P112.00
  Change Due P0.00
  ========================================
              VAT Breakdown
  ========================================
  VAT Sales              [V]       P112.00
  VAT Exempt Sales       [N]         P0.00
  VAT Zero Rated Sales   [Z]         P0.00
  VAT                               P12.00
  ========================================

     Thanks for visiting us today
      Please retain your receipt
         as proof of purchase

  Operator:     Susan
  Line Items:   1
  Terminal:     37
  O.R.:         000003 2015-05-06 14:27:06
```

When a senior-citizen's discount is applied, the receipt also shows:

- The total amount of items eligible for a senior citizen's discount.
- The total VAT of the eligible items.
- The total amount owed after the discount, not including VAT.
- The total amount of discount applied.

```
    Sample Store
     Tax Invoice
  Waverly Rd,Wheelers Hill
     ph (999) 1111 1111
    Fax (999) 3333 4444
   www.somewebsite.com
  TIN 008-323-655-001 VATK
  Machine ID No. 130331735
  Permit No. 0913-53B-167830-001
Test Item                       P112.00N
Less VAT                       -P12.00
Less SC Discount                -P20.00
----------------------------------------
Total                            P80.00
CASH                             P80.00
Change Due P0.00
========================================
            VAT Breakdown
========================================
VAT Sales              [V]      P0.00
VAT Exempt Sales       [N]     P80.00
VAT Zero Rated Sales   [Z]      P0.00
VAT                             P0.00
========================================



     ----SENIOR DISCOUNT----
SC Item(s)                P112.00
Less VAT                   P12.00
Discountable items         P80.00
Total Discount             P20.00


----------------------------------------
Senior Citizen Signature
OSCA #  12345-1234-78
Name    Mary Smith
----------------------------------------


   Thanks for visiting us today
    Please retain your receipt
       as proof of purchase

Operator:     Susan
Line Items:   1
Terminal:     37
O.R.:         000004 2015-05-06 14:35:01
```

All other features and functions of the Point of Sale remain the same.

Glossary

Account

An account is a general ledger structure that categorises particular kinds of income or expenditure for financial reports. Accounts may also be called Ledgers in the Portal.

Advance

An advance is a record of cash added to the cash drawer, for example when the day's cash float is added, or additional change is required.

Appointment

An appointment is an entry for a customer in the Scheduler that represents one or more specific services scheduled at a particular time for the customer. It can be retrieved by the Point of Sale and added to a transaction. Appointments can be rescheduled, cancelled or duplicated.

Balanced transaction

A balanced transaction is a transaction where the remaining amount due is zero. That means:

- The full amount owed has been tendered.
- Any overtendered amount has been issued as change.

Only balanced transactions can be finalised.

Barcode

A barcode is a string of numbers that links to an item. Items can have multiple barcodes assigned to them. Some barcodes called Price Embedded Barcodes encode information such as the quantity, weight or price of the item into the barcode. You can configure different types of price embedded barcodes in the Portal.

Base station

Each site has a base station that:

- Coordinates the terminals and printers.
- Connects to external databases, such as the Scheduler.
- Stores files needed by the Point of Sale.

For security reasons, terminals can only be used if they are on the same wireless network as the site's base station.

Cash drawer

A cash drawer is the physical container for notes and coins which is connected to one or more terminals.

Centre vouchers

Centre vouchers are gift vouchers that have been issued by another organisation, such as a shopping centre or gift agent. While they may have printed serial numbers, the Portal does not track their serial number and cannot verify their value.

Complete Order

A customer order is complete when:

- The order has been fulfilled on the Portal.
- The order has been marked as paid in full on the Portal or the customer has paid the remaining amount on the Point of Sale.
- The order has been collected or delivered.

Covers

Covers is a term using in table service to count the number of people being served at one table. A table of four people has four covers, a table of eight people has eight covers. You can optionally record covers during table service for reporting and service purposes.

Credit limit

A credit limit is the maximum amount of money a debtor is allowed to owe your organisation at any one time. For example, if a debtor's credit limit is $1000 and they already owe $900, they can only go into debt to the value of another $100.

Customer

A customer is a person or organisation who purchases items in advance, to be collected or delivered at a later date. Customers may also have debtor accounts, where they are allowed to owe money to your organisation and can pay off that debt via the Point of Sale.

Customer order

A customer order is a transaction that contains specified quantities and prices of items to be paid for and either collected or delivered at a later date. Customer orders can only be linked to one customer, and must be initially paid for with a deposit. A customer must have a customer account with your organisation to be able to place an order, but they do not have to have a debtor account.

Debtor

A debtor is a customer who has been extended a line of credit by your organisation: they are allowed to owe a certain amount of money (up to their credit limit) to your organisation with the agreement the amount is paid off before a set period of time, which allows them to buy large quantities of goods, or buy items frequently and make payments at a later time. Customer orders that have not yet been collected or completed are not counted as "money owed". Customer accounts are separate from debtor accounts, and not all customers are debtors.

Debtor balance

A debtor balance is the amount a debtor currently owes your organisation. This amount only includes finalised transactions that have been added to the debtor's account for future payment, and does not include orders that have not been completed or collected yet.

Debtor enquiry

A debtor enquiry is a search for a particular debtor based on their name, either to view the debtor's details including their account balance, or add them to a transaction.

Debtor payment

A debtor payment is an amount paid to your organisation by a customer with a debtor account. The amount paid is used to pay off all or some of what the customer owes your organisation. For example, if a debtor owes your organisation $1000 and makes a debtor payment of $300, the debt is reduced to $700. Debtor payments are only used to pay debtor accounts, and are can not be used to pay all or part of customer orders that have not yet been collected or completed. Debtor accounts must be created for customers on the portal; not all customers have debtor accounts.

Deposit

A deposit is a small amount paid by the customer when lodging an order, as assurance that they will pay the remaining money owed. Deposits are not refundable, but they are subtracted from the remaining amount owed. For example, if the full cost of the order is $100 and the deposit is $20, the customer only has to pay the remaining $80 to have paid in full.

Discount

A discount is a reduction in the price of an item. Discounts can apply to:

- A selected item, calculated either per-unit or per-line.
- The whole transaction, calculated per-unit or per-line for every item in the transaction.

> **Note:** Some items may have discount maximums. If the discount you select is greater than the maximum discount allowed for the item, the item is only discounted up to its maximum level.

Per-unit discounts can:

- Reduce an item's price by a percentage of the original price. For example, 10% off.
- Reduce an item's price by a flat amount. For example, $1 off.
- Set the per-unit price to a set amount. For example, $5 per item.
- Set the price of the item to its cost price plus a set amount.
- Remove the tax of an item.

Per-line discounts can:

- Cap the total price for an item line to a predetermined amount. For example, the line total may be anything up to a maximum of $10.
- Set the total price for an item line to a predetermined amount. For example, the line total is $10.

A discount may also prompt the operator for a discount amount.

Note: The item and transaction discounts available and the item discount maximums are configured in the Portal.

Note: Special discounts such as some senior citizens or disability discounts make an item tax exempt. If a tax exempt discount is applied, the customer must supply their Senior Citizen or Tax Exempt ID during the tender process in order to receive the discount. The Point of Sale displays the discount as if from the normal tax-inclusive price.

Finalise

Finalising a transaction records it as being complete. Transactions that have been finalised cannot be edited or voided. Transactions must contain items, and must balance before they can be finalised.

Fulfilled order

A customer order is fulfilled when the requested quantities of items contained in the order have been set aside for the customer and recorded in the Portal. Orders can only be fulfilled via the Portal.

Gift voucher

A gift voucher is a physical or electronic voucher representing a preloaded amount of money previously purchased from your organisation. Your organisation may have several different types of gift vouchers configured. Gift vouchers do not include credit notes, promotional codes or vouchers from other organisations such as shopping centres.

Gift vouchers are identified by a serial number and verified by the Portal when being both purchased and redeemed.

Handover

A handover is a record of cash being removed from the cash drawer. For example:

- Performing a cash-drop to take excess cash to a secure location for security purposes.
- Exchanging larger cash denominations for change.
- Providing change for another cash drawer.

Customer invoice

A customer invoice is a document pertaining to a specified customer that details the amounts owed by that customer as of the invoice date.

Item

An item represents a good or service provided by your organisation. Items are added to transactions in order to sell or return them. An item will include information about its:

- Barcode.

  > **Note:** An item can have more than one barcode.

- Description.
- Unit of measurement, for example an item may be sold by weight or as individual units.
- Price per unit of measurement.

Items also have additional information stored on the Portal, such as stock on hand, promotions and discount maximums.

Item field

980

Ch & Veg Stirfry

980000322

3.980kg N x $7.99/kg $31.80

The Item field displays different information depending on your current task. For example:

- When looking up or adding an item to a transaction, it displays the item description and barcode, quantity or weight, price per unit and any applied discounts.
- When looking up a loyalty card, it displays the loyalty number and customer's name.
- When recording a tender, advance or handover, it displays the selected amount.

Item options

Items can be modified with options to detail the customer's specific request. For example, a coffee order may contain soy milk or extra sugar. The options available for each item must be configured in the Portal.

Label

A label is attached to an item and displays information about that item, such as the item's price, best before date and quantity, cooking or nutritional information, or a barcode. Labels can be printed via the Point of Sale.

Layby

A layby is a transaction where a customer commits to purchase a selection of items at a future date. The customer pays a deposit and an optional fee, and must pay the full balance by the due date or forfeit the items. The site commits to set the items in question aside for the customer, so they can be collected when the layby is paid in full.

Laybys may be created and paid through the Point of Sale. Layby collection is not recorded. Laybys can only be edited or cancelled on the Portal.

Loyalty

Loyalty is a system to encourage customers to return to your organisation. For example, by:

- Offering discounts on purchases.
- Offering exclusive promotions.
- Allocating points for each purchase that can be redeemed on future purchases.

Loyalty is configured for your organisation on the Portal.

Loyalty card

A loyalty card is a physical or electronic card that uniquely identifies a customer's loyalty account, and records:

- Contact information.
- Whether the customer wants to be notified of promotions, and which contact method to use.
- The customer's purchases on that card.
- The points balance, if your loyalty is configured to award points.

Message

A message is a communication sent from the Portal, like an email. Messages can be sent to:

- specific Point of Sale or Portal operators
- all Point of Sale or Portal operators at a specific site
- all Point of Sale or Portal operators in a company.

No-sale

A no-sale records the opening of the cash drawer without a transaction taking place. For example, if incorrect change was given to a customer.

One-shot button

A one-shot button is a custom button that can be configured to perform functions such as creating gift vouchers, looking up specific items or adding options to an item. One-shot button configurations are specific to each terminal group.

One-shot button page

A one-shot button page displays a specific set of configured one-shot buttons, such as a list of top selling items, or a layout of tables. The page is opened using a one-shot button that is configured to open the page.

Open order

A customer order is open when it has been recorded in the Portal, the deposit has been paid, but the order has not yet been fulfilled.

Operator

An operator is a staff member who uses the Point of Sale to process transactions or manage the cash drawer. Each operator is identified by a unique operator code and password that they use to log into the Point of Sale. Operator codes are unique to each site, but do not have to be unique within a company.

Overtendering

Overtendering occurs when the tender amount is greater than the remaining amount due in the transaction. For example, if the transaction total is $18 and the customer offers $20, they have overtendered. Some tender types, such as cash, typically allow overtendering and the Point of Sale automatically calculates the overtender amount as change due. Other tender types, such as credit cards, may not permit overtendering.

Petty cash

Petty cash is money that is taken from the cash drawer to pay for day-to-day business expenses such as stationary, cleaning supplies, maintenance tools or break room supplies. Petty cash expenses are recorded against general ledger accounts, depending on the type of expense.

POS

The Point of Sale is the software through which transactions and cash drawer operations are recorded on a terminal.

Portal

The Portal is the web application that manages the information related to running your organisation, including inventory management, creditors and debtors, staff management and many more functions. Your Portal configuration controls many aspects of how your Point of Sale operates.

Price change

A price change updates the Portal with new prices for each price level of an item. Price changes can only be performed by operators with sufficient Portal privileges.

Price level

The Portal inventory system can store multiple price levels. For example, you may have one price level for retail customers and another for corporate or wholesale customers. The Point of Sale can be configured to use the appropriate price level when a debtor or customer is added to the transaction.

Price override

A price override sets the item's per-unit price to a specified amount. The total line cost including any discounts are calculated from this new amount.

Quantity

The quantity is the number of units of an item that have been added to a transaction. Quantity is only applicable when items are sold per individual unit rather than by weight measurement.

Quick amount buttons

The Quick amount buttons display the common denominations for your selected currency, or the equivalent value in loyalty points when points are being redeemed. They can also be configured to display images of the notes and coins.

Receipt

A receipt is the printed record of a transaction, including the items, quantities and prices, any loyalty information, the tenders submitted and the operator, the terminal and date the transaction took place at.

Refund

A refund is the return of all or part of an item in exchange for the amount the customer originally paid for that item.

Sales report

A sales report summarises the transactions for a specified date into:

- Takings by tender type and total number of transactions.
- Takings by department type, and total number of items sold in each department.
- Takings per item, transactions including that item and quantity of each item sold.
- Number of transactions by operator and cash-drawer, and quantity of each item sold by each operator.

Sales report data can be cleared using a ZZ read.

Scale

A scale is a device connected to a terminal via the base station and used to weigh items which are sold by unit of weight. The Point of Sale does not permit an operator to override the scale results with a quantity when adding weighed items to a transaction.

Scheduler

The Scheduler runs separately to the Point of Sale to manage service appointments. It can link into the Point of Sale via the base station to process payments for those services in transactions.

Site

A site is a single, physical store. A company can have several sites if they have stores at different locations. Each site has a base station, which terminals connect to.

Supervisor

A supervisor is an operator who has permission to authorise restricted actions such as changes to the terminal settings. Supervisor status is configured on the Portal.

Table

A table identifies a customer or group of customers who may add items to the same transaction over a period of time, such as ordering drinks and meals.

Takings report

A takings report summarises the cash-drawer amounts by tender type and number of transactions. Takings report data can be cleared using a ZZ read.

Tare

A scale tare is the weight that is considered zero for the purposes of measuring items. For example, to exclude the packaging from the weight of the item. Some items may have their packaging weight configured on the Portal. The Point of Sale can set or override the tare weight when weighing items.

Tender

A tender is a payment recorded for a transaction. It incorporates an amount that has been paid, and the tender type used for that payment, such as cash or credit card. A transaction can have several tenders of different types.

Tender type

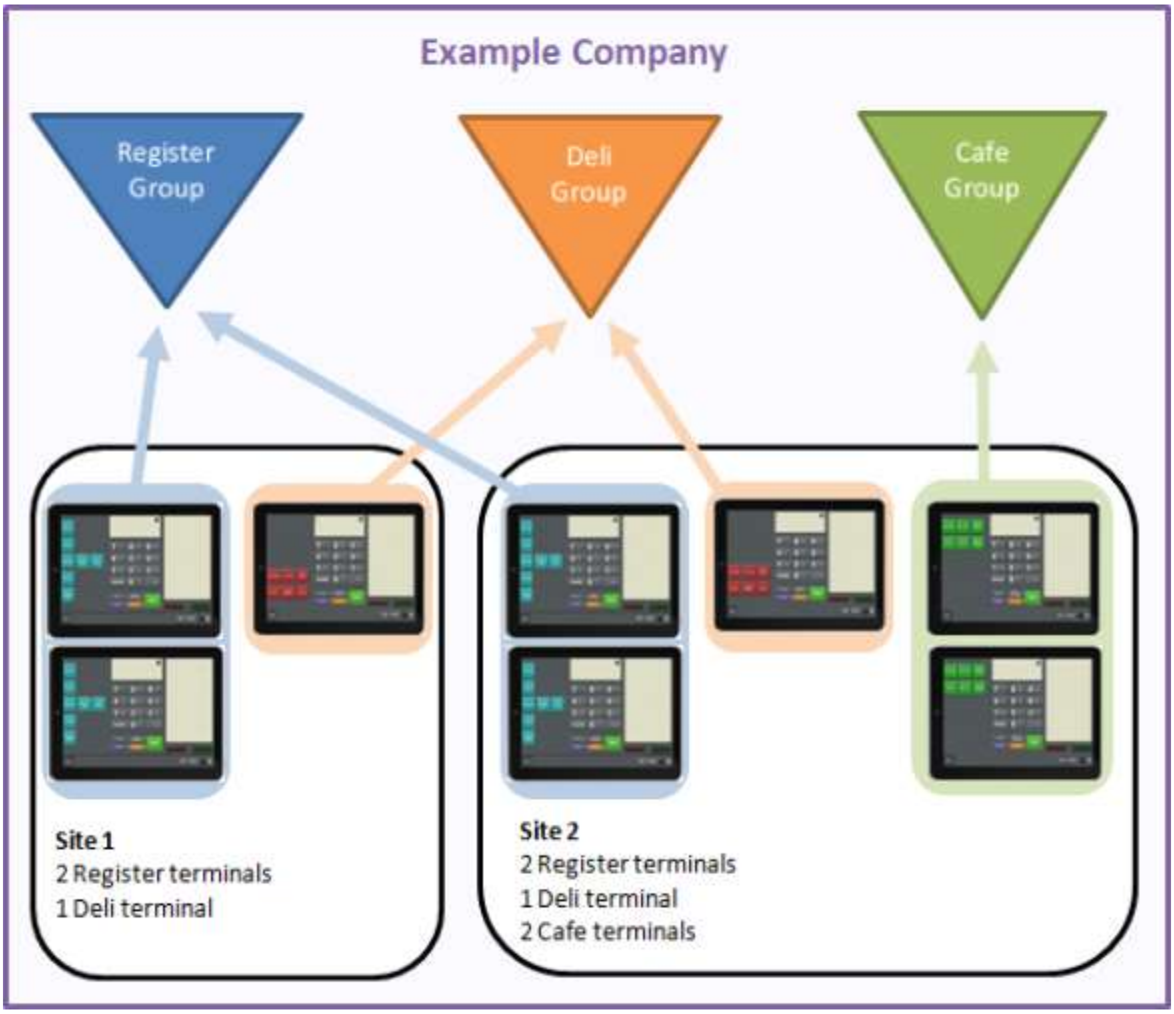
A tender type is a method of payment for a tender, such as a credit card, cash, or gift voucher. Some tender types may have rules configured, such as a maximum that can be paid with that tender type in one transaction. The available tender types and their rules are configured on the Portal.

Terminal

A terminal is the tablet or other device that runs the Point of Sale. Each terminal is connected to the site via the base station, and is identified by a unique terminal number, which is recorded in every transaction made by the terminal.

Terminal group

A terminal group defines a terminal configuration, including security settings, one-shot buttons and other settings such as service charges. Terminal groups are shared across all sites of a company, and may be used at multiple sites. Several terminal groups with different settings may exist within a company. A terminal can only belong to one group at a time, but can be changed to another group at any time to use that group's configuration settings.



Time-hour report

A time-hour report summarises the transaction totals and number of transactions of a specified date into hourly blocks. Time-hour report data can be cleared using a ZZ read.

Point of Sale Transaction

A Point of Sale transaction is an exchange of items, which represent goods or services provided by your organisation, for payment. Transactions include all the relevant information about the exchange:

- The date, time, site and location of the transaction.
- The operator who performed the transaction, and which terminal they used.
- The items purchased or returned and in what quantities.
- The amounts and types of payments provided, including any change or reimbursement provided to the customer or redeemed loyalty points.

> **Note:** Transactions cannot be finalised until they balance. That is, the amount owed by the customer is zero, and any amount that has been overtendered has been issued as change.

- The loyalty number linked to the transaction, if applicable.

You can view what is currently included in the transaction in the Transaction list of the Point of Sale.

> **Note:** In the Portal, a transaction also refers to an exchange of money, such as the payment of a creditor, or a debit adjustment.

Tax exempt

A tax exempt transaction is a transaction that has all government and state taxes removed from all items. This is used for certain discounts or circumstances, such as disability pensions. If a transaction is made tax exempt, the customer must provide a valid tax exemption ID when the transaction is tendered.

Transaction line

A transaction line is an entry in the Transaction list that contains an item and its quantity. If more than one unit of an item is added to a transaction, the units are grouped into a single line. Actions such as price overrides, voids, discounts or refunds then apply to all units in the line.

Chicken Drum/stk
6.583kg N x $2.99/kg $19.68

Crown Lamb Roast
1.426kg N x $12.99/kg $18.52

Total: $38.20

Credit Card $20.00
CASH $50.00

Change $31.80

Transaction list

The Transaction list appears on the Transaction screen and Tender screen of the Point of Sale, and displays everything that has been recorded in the current transaction. This includes:

- Items being purchased or returned, their quantities and prices.
- Any price overrides or discounts applied to items or the transaction.
- The amounts and types of tenders used to pay for the transaction.
- Any gift vouchers created during the transaction.
- The loyalty number linked to the transaction, if applicable.

Rewards card
Brian Smith

Skinless Chicken Breast
16.358kg N x $5.99/kg $97.98

Total: **$97.98**
Rewards card redemption (50 pts) $10.00
Credit Card $50.00
Gift Voucher $20.00
CASH $20.00
Rounding $0.02

Change $2.00

Transaction type

Transaction types control how the Point of Sale behaves during a transaction. Different transaction types behave in slightly different ways, and can offer optional configurations. Any Point of Sale terminal can process a transaction of any type, even if the terminal is not configured to process it.

The Point of Sale has three transaction types available:

Non-table service	Normal register transactions that do not send items to the kitchen, such as purchasing a shirt or other goods at a cash register.
Take away **(table service)**	Table-service transactions that send items to the kitchen and can optionally: ▪ Be assigned to a table. ▪ Record a customer's name. ▪ Record the number of covers.
Dine in **(table service)**	Table-service transactions that send items to the kitchen and must be assigned to a table. Dine in transactions can optionally: ▪ Record a customer's name. ▪ Record the number of covers.

Void

Voids can be performed on unfinalised transactions. You can either:

- Void the entire transaction, clearing it from the Point of Sale.
- Void an item within the transaction, removing that item line from the transaction.

In either case, the Point of Sale records that the void occurred and the reason given, if the Point of Sale is configured to prompt for a reason.

X read

An X read is a snapshot of the current site records, including:

- The sales summary, including discounts, services charges, tax and rounding.
- The transaction totals.
- The terminal activity, including transaction totals by tender type, all advances, handovers, voids and petty cash allocations.
- The total amount subtracted in item and sales discounts.
- The number of transactions per tender type.
- The total taxable and non-taxable sales, and tax collected.
- The number of transactions and total takings per each hourly block.

Performing an X read does not affect the information in any way.

Z read

A Z read is a record of the site's transaction data, including:

- The sales summary, including discounts, services charges, tax and rounding.
- The transaction totals.
- The terminal activity, including transaction totals by tender type, all advances, handovers, voids and petty cash allocations.
- The total amount subtracted in item and sales discounts.
- The number of transactions per tender type.
- The total taxable and non-taxable sales, and tax collected.
- The number of transactions and total takings per each hourly block.

Performing a Z read sets all transaction, tender and item totals for the day to zero.

ZZ read

A ZZ read is a record of the site's transaction data, including:

- The sales summary, including discounts, services charges, tax and rounding.
- The transaction totals.
- The terminal activity, including transaction totals by tender type, all advances, handovers, voids and petty cash allocations.

- The total amount subtracted in item and sales discounts.
- The number of transactions per tender type.
- The total taxable and non-taxable sales, and tax collected.
- The number of transactions and total takings per each hourly block.

Performing a ZZ read clears all the transaction and tender totals as well as all sales and takings reports.

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