

Retailer POS Procedure for counter staff

Updated 6th December 2021 by Paul

Start of day initiation

- The power button is located on the **right** side of the computer screen
- Once the system has power on, click on the yellow **Retailer** icon
- Retailer will start and should automatically load to the Point Of Sale screen

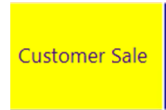


Processing a sale

Assign customers details to sale

All BAAG Garden Club and Trade Customers have their details stored, this allows us to be able to look back on previous sales that they have made and automatically apply discounts

- Click on the **Customer Sale** button
- The **Find Customer Screen** will then pop up



Find Customer Screen

Surname	Given	Company	Mobile	Phone	Email	Street Key	Suburb	Barcode	Cust No	Balance
MS - BULLEEN ART & GARDEN		MS - BULLEEN ART & G.							1	\$0.00
Muckner	Jackie				jackie.6789@hotmail.co		Heidelberg	25100310	10031	\$0.00
Mudgway	Natale		0407547111		natale@mudgway.net.a		Bulleen	25117103	11710	\$0.00
Mudher	Surinder				gurinderudher@gmail.c			25052374	5237	\$0.00
Mudher	Surinder				surinderudher@hotma		Bulleen	25117387	11738	\$0.00
Mueller	Daniel		0403437280		d.j.mueller@hotmail.co			25149654	14965	\$0.00
Mugavin	Carmel				cjmugavin@gmail.com		Mont Albert North	25125979	12597	\$0.00
Mugavin	Ellen				ellenmugavin@gmail.co		Brunswick	25077841	7784	\$0.00
mugavin	Maryann				maryannmugavin@gmai		Ivanhoe	25094534	9453	\$0.00
Muhleisen	Greta				gmuh@hotmail.com		North Fitzroy	25081343	8134	\$0.00
Muhleisen	Peter		0409183602		petermuhleisen@bigpo			25159431	15943	\$0.00
Muhtaseeb	Hayley		0433662172		englethroe24@hotmail.		Warrandyte	25122213	12221	\$0.00
Muir	Anne-Louise		0437841926					25138887	13888	\$0.00
muir	Annie				chaanniejason@gmail.c			25045734	4573	\$0.00
Muir	Genevieve		0488279645		rainsinmelb@gmail.co			25159868	15986	\$0.00
Muir	Ian		0407558852		ianmuir2@bigpond.co			25152753	15275	\$0.00
Muir	Kate				tonykate64@bigpond.co			25072440	7244	\$0.00
Muir	Kirsten				kirsten.muir@gmail.co		Alphington	25091243	9124	\$0.00
muir	Melissa		0402825951		melsie28@hotmail.co		Doncaster	25120530	12053	\$0.00
Muir	Sue				muir.susanne.s1@edun		Hurstbridge	25110906	11090	\$0.00
Mukherjee	Prbti			94359650	prbmukherjee@hotmail.c		Montmorency	25108408	10840	\$0.00
Mukherj	Elizabeth		0403202528		elizabeth.mukherj@gma			25150803	15080	\$0.00
Mulcahy	Clodagh		0416108824		clodaghmulcahy@gmail		Balwyn	25113051	11305	\$0.00
Mulder	Beryl		0418821912		berylmulder@smatchat		Coburg North	25078862	7886	\$0.00
mulder	Claudia		0439106292		claudia.mulder@bigpond		Alphington	25090727	9072	\$0.00
Mulder	Raoul				r.mulder@unimelb.edu.a		Coburg	25079838	7983	\$0.00
Muleta	Jim				muleta56@hotmail.com		Eltham North	25109887	10988	\$0.00
Muhauser	Sandy				s_muhauser@hotmail.co		Richmond	25122959	12290	\$0.00
muherin	Lindy				privatelindy@gmail.co			25096524	6524	\$0.00
Muholland	Jenny		0413988912		jenny@mymuholland			25153637	15363	\$0.00
Mulane	John		0400683747		john.mulane@bigpond.c			25154207	15420	\$0.00
mullenger	Leigh				leigh_mullenger@hotmai		Coburg	25079517	7951	\$0.00
Mullenger	Tess				tess_mullenger@gmail.c			25071887	7188	\$0.00
Mullenger	Tess		0421869936		tess_mullenger@hotmail			25162448	16244	\$0.00
Mullens	Damian			94550726	damianmullens@yahoo			25149708	14970	\$0.00
Mullens	Peter				mulp2002@yahoo.com.i		Balwyn	25113518	11351	\$0.00
Mullens	Peter				mulp899@gmail.com		Balwyn	25113525	11352	\$0.00
Mullens	Tommie		0439431988		tommmullens54@gmail.co			25162707	16270	\$0.00
Muller	Louise				waltou12@gmail.com		Rosanna	25103717	10371	\$0.00
Mulligan	Jeanie		0418398857		jeaniemulligan@gmail.co			25153453	15345	\$0.00
Mulline	Alex				alexandra.mulline@outlo			25041548	4154	\$0.00

Search for: Search field: Surname

Grid count 13053

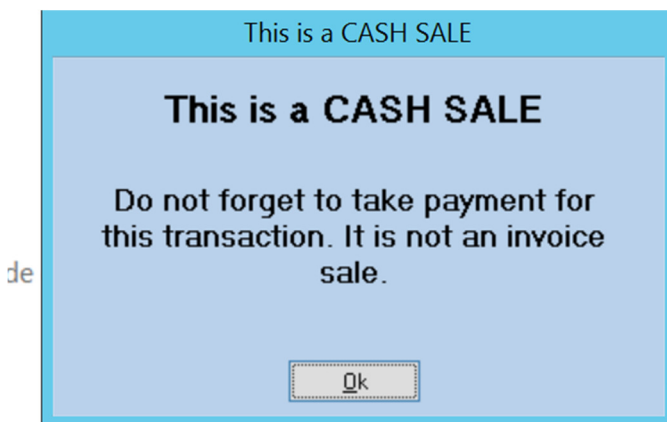
- The default search field is **Surname**, you can also search by any of the other fields. To do so, click in one of the cells within the field that you would like to search

rds_server - Remote Desktop Connection

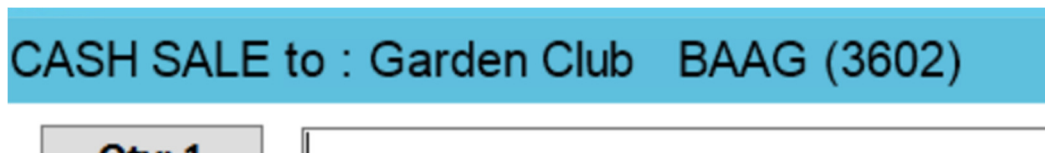
Surname	Given	Company	Mobile	Phone
Lawson	Sheena		0492832562	
Cook	Megan		0492930970	
swan	p		0492951747	
Bridson	Paulette		0492971288	
Grose	Penelope		0492988325	
Hunter	Trepheena		0493066689	
Coombes	Nick	Easv Landscape Solutio	0497 587 508	0497 5

Click in any cell of the field that you would like to search

- In the search for box type in the customer details, as you type the system will automatically go to the matching records
- Click on the customer
- A message will come up if they are not an account customer, click OK



- The details of the customer are displayed in the top left-hand corner of the POS screen



Adding items to the sale

- Use the barcode scanner to scan products with barcodes.
- For multiples of any products, you can either scan each of the items or click on the **Qty:** button in the top left corner.
- If the item doesn't have a barcode, use the menu buttons to navigate to the product that you are after.
- The **Old Price Sticker** can be used for products that have our old price stickers or won't scan due to a damaged barcode label.

Purchasing a Gift Voucher

- Click on the **BAAG Gift Voucher** button
- Enter the value of the voucher required and hit OK
- The voucher purchase will display on the left-hand screen
- Write out voucher and add to the book as normal



Taking payments

Once you have entered all the items into the register, double check on the left-hand item list screen that everything is correct. If so, it is time to take the payment.

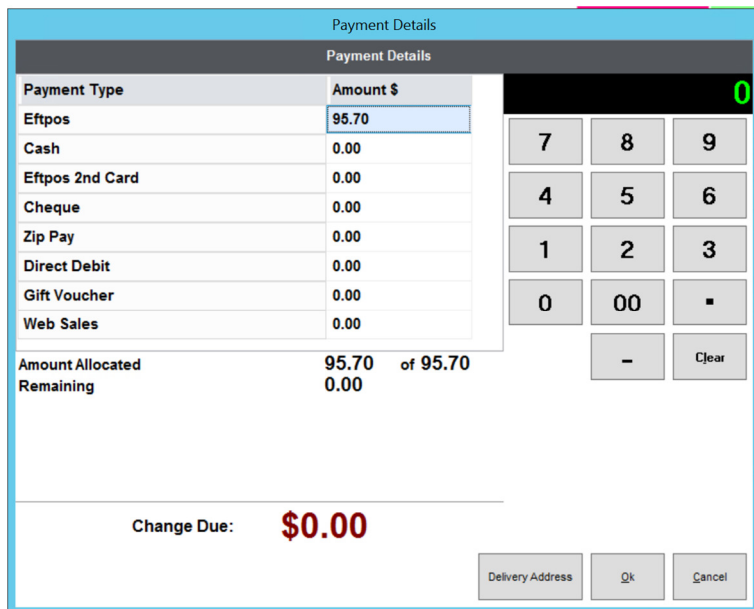
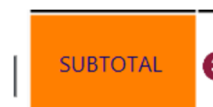
The amount owing is displayed at the bottom of the screen

eftpos Payments

- Click on the eftpos button.
- Enter your 4 digit pin
- The amount owing will go directly to the eftpos machine
- Once the payment is received an approved message will display on the screen and the receipt will print out

Cash Payments and payments using 2 eftpos cards

- Click on the **SUBTOTAL** button
- Enter your 4 digit pin
- The **Payment Details** screen will pop up

The screenshot shows a 'Payment Details' screen. At the top, there's a title bar 'Payment Details'. Below it is a table with two columns: 'Payment Type' and 'Amount \$'. The table lists several payment methods: Eftpos (95.70), Cash (0.00), Eftpos 2nd Card (0.00), Cheque (0.00), Zip Pay (0.00), Direct Debit (0.00), Gift Voucher (0.00), and Web Sales (0.00). Below the table, it shows 'Amount Allocated 95.70 of 95.70' and 'Remaining 0.00'. To the right of the table is a numeric keypad with buttons for digits 0-9, a decimal point, and a 'Clear' button. At the bottom, it says 'Change Due: \$0.00' in red. There are also buttons for 'Delivery Address', 'Ok', and 'Cancel'.

- Click on the cell next to cash to select this as the payment type

Payment Details

Payment Type	Amount \$
Eftpos	0.00
Cash	100.00
Eftpos 2nd Card	0.00
Cheque	0.00
Zip Pay	0.00
Direct Debit	0.00
Gift Voucher	0.00
Web Sales	0.00

Amount Allocated 100.00 of 95.70
 Remaining -4.30

Change Due: **\$4.30**

Delivery Address Ok Cancel

- Change the amount to that given to you by the customer and click OK
- The register cash draw will open and the receipt will print out

Gift Voucher Payments

- Click on the **OLD GIFT VOUCHER** button.
- Enter the total value of the gift voucher.
- The Voucher and amount will display on the left-hand list screen as a negative value
- If the total value of the purchases is greater than the value of the voucher, take payment for the remainder as above
- If the voucher value is greater than the purchases, you will need to create another Gift Voucher for the balance.



Qty	Description	Unit Price	Unit Discount	Total
-1	OLD GIFT VOUCHERS	\$200.00	\$0.00	-\$200.00
6	BAAG Premium Potting Mix 40L	\$15.95	\$0.00	\$95.70

Change	Total Discount	Sub Total -\$104.30
--------	----------------	---------------------

In the example above a new voucher for \$104.30 needs to be created.

- Press the **BAAG Gift Voucher** button
- Enter the amount (in this example \$104.30) and press OK
- The Sub Total should now be **\$0.00**

Qty	Description	Unit Price	Unit Discount	Total
-1	OLD GIFT VOUCHERS	\$200.00	\$0.00	-\$200.00
6	BAAG Premium Potting Mix 40L	\$15.95	\$0.00	\$95.70
1	BAAG Gift Voucher (without Barcode)	\$104.30	\$0.00	\$104.30

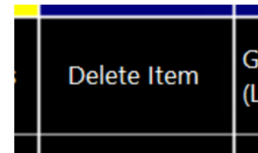
Change	Total Discount	Sub Total \$0.00
--------	----------------	------------------

- To finalise the sale, press **SUBTOTAL**, select Cash and press OK.
- A receipt will print out
- Write out a new Gift Voucher for the outstanding amount and add to the book.

What to do when things don't quite work out...

Remove an incorrect item

- Click on the grey square next to the quantity of the item
- A triangle pointing to the item should appear
- Click on the **Delete Item** button
- Confirm by clicking Yes



Cancel an entire sale

- Click the **CANCEL SALE** button
- Enter your 4 digit pin and click OK



Place a sale on hold/suspend a sale

If you are part way through a transaction and you need to suspend a sale because the customer has forgotten something etc. you can do so using the **Suspend Sale** button. To resume the sale, click the **Suspend Sale** button again.

Please note: All suspended sales are cleared overnight

Refunds

All refunds need to be undertaken by the manger/senior staff member

Refunding an entire sale

- Find the original sale using either
 - The original docket – scan the barcode
 - The previous sales screen
 - The customer screen – from here click view all transactions to search through previous sales
- Click on the **Refund** button
- Enter the password for refunds
- All items purchased from that sale will display as negatives on the POS screen
- Process the refund using the same payment method as the original sale (including the same card).
- If providing a gift voucher enter amount necessary to make Sub Total equal to \$0.00

Refunding part sale/small number of items

- Change the **Qty:** to the negative number for what is being returned

Qty	Description	Unit Price	Unit Discount	Total
-2	BAAG Premium Potting Mix 40L	\$15.95	\$0.00	-\$31.90

- The amount to be returned will display in red
- Process the refund using the same payment method as the original sale (including the same card).
- If providing a gift voucher enter amount necessary to make Sub Total equal to \$0.00