

Items to Review Prior to Activity

Beginning

You will need to sign into the register. This process will be covered shortly.
 If after you log in and the your register remains idle for about 5 minutes, you will be signed out. Therefore, you will need to re-log back into the system.

When a watch (clock) symbol displays, the system is processing the request. You must wait for the POS to process that activity before continuing.

POS Overview and Getting Started Hands-On

In this section, you will be:

- ✓ Signing onto the system
- ✓ Putting it in training mode
- ✓ Getting familiar with the look and feel of the new register and its functions by touching the screen, exploring the buttons, reviewing the menu bars navigation

Signing on for the first time is different than a regular sign on because you must change your password at that point. Else, it's a regular sign in no password is needed.

Password criteria stays the same. When changing your password in this new system, you can change it to what you currently use.

Be sure to use your workbooks as necessary to better understand the colors and their meanings, for instance.

Each procedure throughout the workbook contains either a Read or Activity.

Transactions

In this section, you will try out transactions such as the following:

- ✓ Transactions using various types of tender
- ✓ Applying Discounts
- ✓ Voids
- ✓ Changing an item's quantity
- ✓ Price Checks
- ✓ Price Overrides
- ✓ Suspending/ Re-engaging Transactions

While in Training Mode, after an item(s) has been scanned, the only way back to the main menu is to:

- ✓ Transactions using various types of tender
- ✓ Or conduct a cash transaction (easiest method)

Scan the items you have been given when conducting a sale

You can only perform cash tender transactions because we do not have valid credit cards, gift/merchant cards or checks to use to practice these transactions.

After running a cash transaction, keep the receipt

A few points that are new:

- ✓ You can change the quantity of the item at any time during the sale (before you could only do this before you scanned the item)
- ✓ Every transaction you suspended in a given day can be searched upon and re-engaged in the system
- ✓ Discounted programs such as WLR, SPC cards Tax-Exempt Companies can be performed in one central screen (not individually as done now) and they can all be performed at any time during the transaction (not just after). Price overrides can also be conducted for any item at any time during a transaction (simply select the line item on the screen).
- ✓ The system automatically recognizes a coupon after you scan it (it will tell you the validity at the end in either green or red). No more need to enter codes such as 999

Returns, Exchanges and Discounts

Activities performed in this section:

- ✓ Process a Resalable Return or Exchange (with receipt)
- ✓ Process a Return or Exchange Without a Receipt
- ✓ Checking Balance on Merchant Cards (not in a transaction)

Use the receipt you kept in the previous cash transaction to use for processing a return with a receipt.

A few points that are new:

- ✓ You will notice that returns and exchanges can be conducted in one central location (not separately as it is done now)

Management Register Functions

Activities performed in this section:

- ✓ Session Viewer (Management Only)
- ✓ Training Mode Off (Management Only)
- ✓ Sign Off the POS

Back Office

When Super User Trains Associates (conduct all the above in addition to this below)

If the student(s) have associate access and not management access, you may need to perform management overrides (i.e. when they try to access training mode). Only managers can allow access to this function.

When a lunch or restroom break is necessary, make sure the student signs off the POS. When they return, have them sign in again. They will need to get back into Training Mode, so depending upon their permissions, you may have to override security.