Register User Guide

for the AXIS™ Retail Management System

Software Version 2.3

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Sauk Rapids, MN 56379
1-800-547-7120
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General Operating Procedures

The following procedures provide an overview of the standard methods for accessing and using the **Register** application.

- Log In to the Register Application (see page 8)
- Use the Cash Register Screen (see page 10)

Log In to the Register Application

1. Locate the **AXIS Register** icon on the desktop.

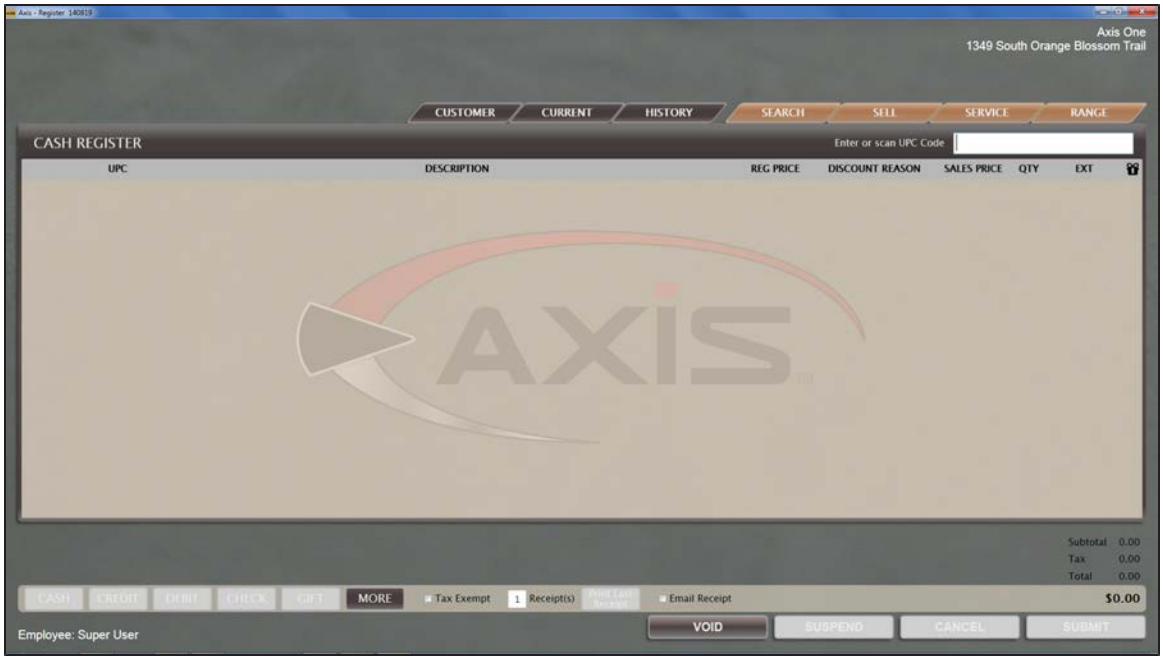
2. Click the **AXIS Register** icon to display the **Register Initialization** window.

Note: Some computers may be configured to require a double-click to open an application.

3. When initialization finishes, the window closes and the system displays the **Register Login** window.

4. Enter the employee number in the **Employee #** field.
5. Enter the password in the **Password** field.
6. Click the **Login** button to display the **Configuration Issues** screen.

7. Click the **OK** button to display the **Cash Register** screen.



8. Refer to Use the Cash Register Screen (see page 10) for more information on using this screen.

Use the Cash Register Screen

1. Log In to the Register Application (see page 8) to display the **Cash Register** screen.

2. Refer to Create a Transaction (see page 16) for a general overview of the procedures needed to create and complete a transaction.
3. Click a tab to complete one of the specific procedures indicated:

Customer Tab	Click to display the **Customer** window and complete any of these procedures:
	• Identify the Customer (see page 17)
	• Set Up and Edit a Customer Record (see page 40)
	  • Set Up a New Customer Record (see page 40)
	  • Edit an Existing Customer Record (see page 41)
	• Clear the Customer Selection (see page 44)

Current Tab	Click to display the **Current** window and complete any of these procedures:
	• View a Customer's Active Layaways (see page 96)
	  • Receive a Payment on a Layaway (see page 97)
	  • Cancel a Layaway (see page 98)
	• View a Customer's Active Product Holds (see page 89)
	• View a Customer's Active Special Orders (see page 80)
	  • Receive a Payment on a Special Order (see page 81)
	  • Finalize a Special Order (see page 83)
	  • Cancel a Special Order (see page 84)
	• View a Customer's Completed Work Orders (see page 106)
	  • Receive Payment for a Completed Work Order (see page 107)
	• View a Customer's Current Firearm Transactions (see page 47)
	  • Move a Firearm Transaction to the Cash Register Screen (see page 48)
	  • Transfer a Firearm to a Customer from the Current Window (see page 49)
	• View a Customer's Upcoming Range Reservations (see page 53)
	• View a Customer's Upcoming Classes (see page 75)
	• View a Customer's Active Memberships (see page 71)
	• View a Customer's House Account Balance (see page 120)
	  • Receive a Payment on a House Account (see page 121)
	• View a Customer's Active Deposits (see page 111)
	  • Apply a Deposit to a Transaction (see page 112)

History Tab	Click to display the **History** window and complete any of these procedures:
	• View a Customer's Layaway History (see page 99)
	  • Process a Return from a Customer's Layaway History (see page 100)
	• View a Customer's Special Order History (see page 85)
	• View a Customer's Work Order History (see page 108)
	• Search the Transaction History (see page 30)
	  • Process a Return (see page 31)
	  • Void a Transaction from the Transaction History (see page 32)
	• Search a Customer's Transaction History (see page 34)
	  • Process a Customer's Return (see page 35)
	  • Void a Customer's Transaction (see page 37)

Search Tab	Click to display the **Product Search** window and complete any of these procedures: • Select a Quick Picks Item (see page 19) • Search for and Select an Item (see page 19) • Select a Firearm from Inventory (see page 20) • Sell a Firearm through the Register Application (see page 46) • Select a Firearm from Inter Store Transfer (see page 20)

Sell Tab	Click to display the **Sell** window and complete any of these procedures:
	• Place a Special Order (see page 78)
	• Place a Product on Layaway (see page 94)
	• Register a Member for a Membership (see page 70)
	  • Register a Group/Family Member for a Membership (see page 72)
	• Register a Class Participant (see page 74)
	  • Relocate a Participant to Another Class (see page 76)
	• Reserve a Range Time (see page 52)
	  • Review All Range Reservations (see page 55)
	  • Cancel a Range Reservation (see page 54)

Service Tab	Click to display the **Service** window and complete any of these procedures:
	• Create a Work Order (see page 102)
	  • View a Customer's Active Work Orders (see page 103)
	  • Add a Detail to an Open Work Order (see page 104)
	  • Close a Completed Work Order (see page 105)
	• Place a Hold on a Product (see page 88)
	  • Sell a Held Product (see page 90)
	  • Cancel a Product Hold (see page 91)

Range Tab	Click to display the **Range** window and complete any of these procedures:
	• Add a Range Customer to the Range Queue (see page 56)
	• Open a Range Customer's Party Control Window (see page 57)
	• Verify a Customer's Range Waiver (see page 58)
	• Rent a Firearm to a Range Customer (see page 63)
	  • Retrieve a Rental Firearm from a Range Customer (see page 64)
	• Assign a Range Customer to a Lane (see page 60)
	  • Turn a Range Lane On or Off (see page 59)
	  • Add a Secondary Shooter to a Range Customer's Party (see page 61)
	  • Move a Range Customer to a Different Lane (see page 62)
	  • End a Range Customer's Lane Time (see page 65)
	• Complete a Range Customer's Transaction (see page 66)
	• End a Range Customer's Range Session (see page 67)

Transactions

- Create a Transaction (see page 16)
  - Identify the Customer (see page 17)
  - Add an Item to a Transaction (see page 19)
  - Adjust Transaction Details (see page 22)
  - Accept Payment for a Transaction (see page 24)
- Record a Paid Out Amount (see page 29)
- Search the Transaction History (see page 30)
  - Process a Return (see page 31)
  - Void a Transaction (see page 32)
- Search a Customer's Transaction History (see page 34)
  - Process a Customer's Return (see page 35)
  - Void a Customer's Transaction (see page 37)

Create a Transaction

The following procedure represents a general overview of the process for creating and completing a transaction. Follow the links for more detailed instructions.

1. Log In to the Register Application (see page 8) to display the **Cash Register** screen.

   Note: For an expanded look at the controls and procedural options available on this screen, refer to Use the Cash Register Screen (see page 10).

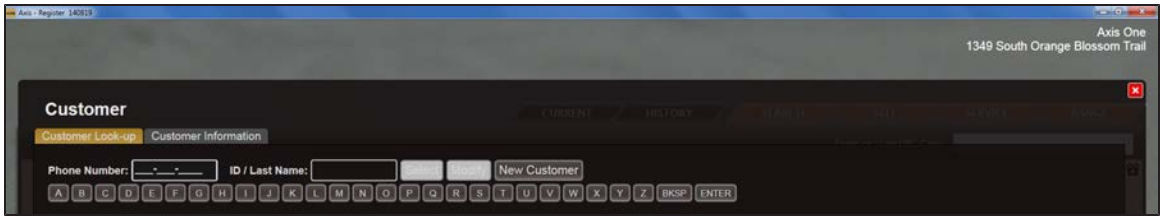
2. Identify the Customer (see page 17).

   Note: If the system has been configured to allow it, customer identification may not be required for some transactions.

3. Add an Item to a Transaction (see page 19) to add it to the **Cash Register** screen. (Repeat as needed to select additional items.)
4. Adjust Transaction Details (see page 22) as needed.
5. Accept Payment for a Transaction (see page 24).

Identify the Customer

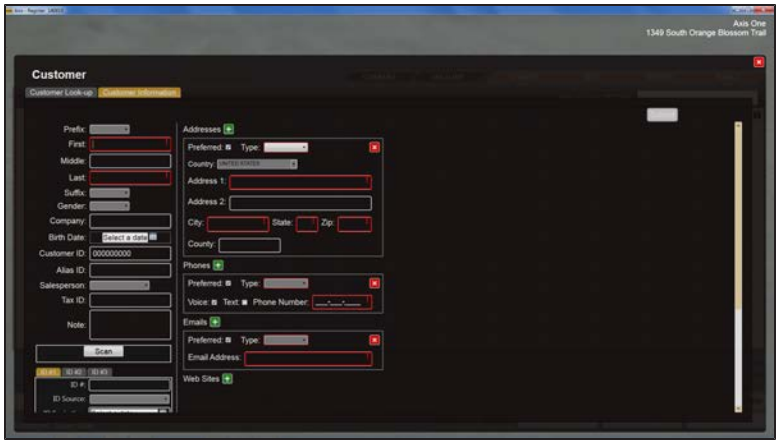
1. Click the **Customer** tab to display the **Customer** window.



2. Complete the following procedures as appropriate to identify the customer:

Add a New Customer

1. Click the **New Customer** button to display the **Customer Information** tab.



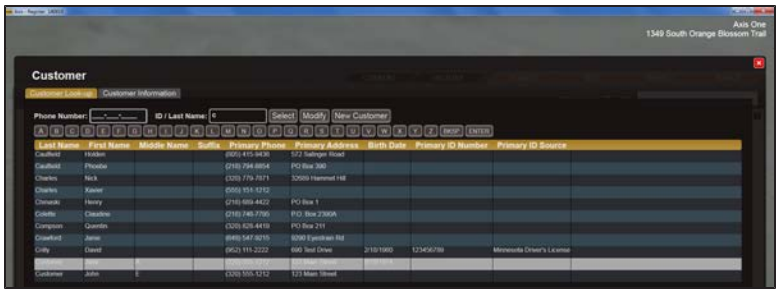
2. Enter customer information in the appropriate fields.

   Note: Refer to Set Up and Edit a Customer Record (see page 40) for more information on completing these fields.

3. When finished, click the **Submit** button to record the customer's information and add it to the **Cash Register** screen.

Select an Existing Customer

1. Complete either of the following to enter search criteria and display all matching customers:
   - Click in the **Phone Number** field and enter the customer's phone number.
   - Click in the **ID/LastName** field and use the keyboard or onscreen letter buttons to enter the customer's last name or customer ID. Then click the **Enter** button (or press the **Enter** key on the keyboard) to display search results.



2. Double-click the customer record to add the customer's information to the **Cash Register** screen.

Note: Alternately, the user may click the customer record to select (highlight) it and perform either of these procedures:

- Click the **Select** button to add the customer's information to the **Cash Register** screen.
- Click the **Modify** button to display the customer's **Customer Information** tab. Refer to Set Up and Edit a Customer Record (see page 40) for more information.

Add an Item to a Transaction

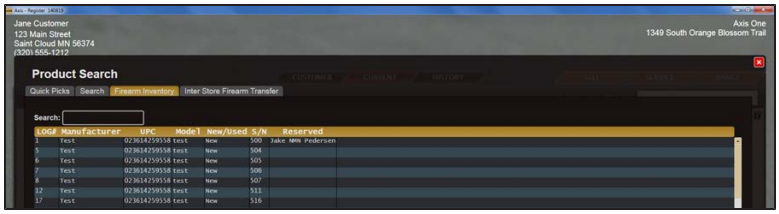
Complete the following procedure to select the item(s) to be added to a transaction.

1. Identify the Customer (see page 17) as needed to display the **Cash Register** screen.

   Note: If the system has been configured to allow it, customer identification may not be required for some transactions.

2. Complete the following procedures as needed to select the appropriate item(s):

Scan a UPC Barcode	1. Scan the UPC barcode. 2. Press the **Enter** key if needed. 3. Continue with the procedure below.
Enter a UPC Number	1. Enter the UPC number in the **Enter or Scan UPC Code** field. 2. Press the **Enter** key. 3. Continue with the procedure below.
Select a Quick Picks Item	1. Click the **Search** tab to display the **Product Search** window. 2. Click the **Quick Pics** tab to display a list of category names. 3. Click a category name to expand it and display associated items. 4. Click an item to highlight it for selection. **Note:** Repeat this step as needed to highlight additional items. 5. Click the **Select** button to add highlighted items to the transaction. 6. Continue with the procedure below.
Search for and Select an Item	1. Click the **Search** tab to display the **Product Search** window. 2. Click the **Search** tab to display a list of items and search tools. 3. Complete the following procedures as needed to narrow the list of items shown: • Click an **Attribute** button and one of its associated **Descriptor** buttons. **Note:** Repeat this step if additional **Attribute** or **Descriptor** buttons display. • Enter all or part of an item's description in the **Partial description** field. 4. If desired, right-click an item to display its details window. (Click the red **Close** button to close this window.) 5. Double-click an item to add it to the transaction. 6. Continue with the procedure below.

Select a Firearm from Inventory	1. Click the **Search** tab to display the **Product Search** window. 2. Click the **Firearm Inventory** tab to display a list of firearms.  3. Enter a firearm's log number, UPC number, or serial number in the **Search** field. 4. Press the **Enter** key to display firearm(s) matching the entered number. 5. If desired, right-click a firearm to display its details window. (Click the red **Close** button to close this window.) 6. Double-click a firearm to display the **Customer Information** window. 7. Enter/edit customer information in the window as needed. 8. Click the **Submit** button to close the window and add the firearm to the transaction. 9. Continue with the procedure below.
Select a Firearm from Inter Store Transfer	1. Click the **Search** tab to display the **Product Search** window. 2. Click the **Inter Store Firearm Transfer** tab to display a list of firearms. 3. Enter a firearm's log number, UPC number, or serial number in the **Search** field. 4. Press the **Enter** key to display firearm(s) matching the entered number. 5. If desired, right-click a firearm to display its details window. (Click the red **Close** button to close this window.) 6. Double-click a firearm to display the **Customer Information** window. 7. Enter/edit customer information in the window as needed. 8. Click the **Submit** button to close the window and add the firearm to the transaction. 9. Continue with the procedure below.
Add a Firearm Processed Through the Data Center Application	Refer to Move a Firearm Transaction to the Cash Register Screen (see page 48) for more information.
Add Range Time	Refer to Add a Range Customer to the Range Queue (see page 56) for more information.
Add a Membership	Refer to Register a Member for a Membership (see page 70) for more information.
Add a Class	Refer to Register a Class Participant (see page 74) for more information.

Add a Layaway Item	Refer to Place a Product on Layaway (see page 94) for more information.
Add a Product Hold	Refer to Place a Hold on a Product (see page 88) for more information.
Add a Special Order Item	Refer to Place a Special Order (see page 78) for more information.
Add a Completed Work Order	Refer to Receive Payment for a Completed Work Order (see page 107) for more information.
Remove an Item from a Transaction	Click the red **Delete Item** button to the left of the item to remove it from the transaction.

3. Continue with the transaction:
    1. Adjust Transaction Details (see page 22) as needed.
    2. Accept Payment for a Transaction (see page 24).

Adjust Transaction Details

Complete the following procedure to modify values and settings for transaction items.

1. Identify the Customer (see page 17) as needed to display the **Cash Register** screen.

   Note: If the system has been configured to allow it, customer identification may not be required for some transactions.

2. Add an Item to a Transaction (see page 19) as needed.
3. Complete the following procedures as needed to modify transaction items:

Check an Item's Inventory Level	1. Click the item to display buttons below it. 2. Click the **Check Inventory Level** button to display the **Inventory Levels** window. 3. Click the **Close** button.
Adjust an Item's Selling Price	1. Click the item to display buttons below it. 2. Click the **Adjust Price/Quantity** button to display the **Change Price Quantity** window. 3. Enter a new value in the **Price** field. 4. Click the **OK** button.
Adjust an Item's Quantity	1. Click the item to display buttons below it. 2. Click the **Adjust Price/Quantity** button to display the **Change Price Quantity** window. 3. Enter a new value in the **Qty** field. 4. Click the **OK** button.
Adjust an Item's Discount	1. Click the item to display buttons below it. 2. Click the **Adjust Price/Quantity** button to display the **Change Price Quantity** window. 3. Enter a new value in the **Percentage Off** field. 4. Click the **OK** button.
Modify an Item's Description	1. Click the item to display buttons below it. 2. Click the **Modify Description** button to display the **Modify Description** window. 3. Edit the text in the text field. 4. Click the **OK** button.
Select the Salesperson for an Item	1. Click the item to display buttons below it. 2. Click the **Salesperson** button to display the **Select Salesperson Who Helped With This Item** window. 3. Select the salesperson's name from the drop-down menu. **Note:** To select this salesperson for all items in the transaction, check the **Attribute all items in this transaction to the selected employee** checkbox. 4. Click the **OK** button.

Create a Tax Exempt Transaction	Note the **Tax Exempt** checkbox on the **Cash Register** screen: • If the checkbox displays a check, a **Tax ID** has been specified on the customer's **Customer Information** window and the transaction will be processed as tax exempt. • If the checkbox is empty, a **Tax ID** has not been specified on the customer's **Customer Information** window. Compete the following steps to add the **Tax ID** to this transaction and the customer's **Customer Information** window: 1. Check the **Tax Exempt** checkbox to display the **Enter Tax ID** window. 2. Enter the customer's **Tax ID** in the field. 3. Click the **OK** button.
Create a Taxed Transaction for a Tax Exempt Customer	Note the **Tax Exempt** checkbox on the **Cash Register** screen: • If the checkbox is empty, a **Tax ID** has not been specified on the customer's **Customer Information** window and the transaction will be taxed as normal. • If the checkbox displays a check, a **Tax ID** has been specified on the customer's **Customer Information** window. Uncheck the **Tax Exempt** checkbox to add tax to the current transaction.
Set Receipt Options	Refer to any of the following for more information: • Set the Number of Receipts to Print for Each Transaction (see page 124) • Email a Receipt for a Transaction (see page 125) • Create a Gift Receipt for a Transaction Item (see page 126)
Remove an Item from a Transaction	Click the red **Delete Item** button to the left of the item to remove it from the transaction.

4. Accept Payment for a Transaction (see page 24) to continue with the transaction.

Accept Payment for a Transaction

Complete the following procedure to complete the payment portion of a transaction by identifying the type and value of tender being exchanged.

1. Identify the Customer (see page 17) as needed to display the **Cash Register** screen.

   Note: If the system has been configured to allow it, customer identification may not be required for some transactions.

2. Add an Item to a Transaction (see page 19) as needed.
3. Adjust Transaction Details (see page 22) as needed.
4. Complete the following procedures as needed to accept the appropriate tender type(s):

   Note: If desired, the total payment amount may be spread across multiple tender types. For instance, a customer may apply the balance on a gift card toward the transaction and then use cash to pay for the remainder of the total amount due.

Accept a Cash Payment	1. Click the **Cash** button to display the **Confirm Payment Amount** window. 2. Enter the amount of cash provided in the **Amount Tendered** field. 3. Click the **OK** button to display "**Cash**" and the amount tendered above the **Subtotal** amount. 4. Continue with the procedure below.

Accept a Credit Card Payment

1. Click the **Credit** button to display the **Confirm Payment Amount** window.
2. Enter the amount to be charged in the **Amount Tendered** field.
3. Click the **OK** button to display the **Make Payment** window.
4. Complete one of the following procedures as appropriate:
   - Use the card reader:
     1. Click the **Swipe** button to change the **Make Payment** window.
     2. Swipe the card through the card reader to populate fields.
     3. Complete unpopulated fields as required.
     4. Click the **Run** button to display results in the **Make Payment** window.
   - Manually enter card data:
     1. Enter values in fields as required.
     2. Click the **Run** button to display results in the **Make Payment** window.
5. If the card is approved, click the **OK** button to display "**Credit**" and the amount tendered above the **Subtotal** amount.

   Note: If the card is not approved,
   1. Click the **OK** button to display "**Credit**" and "0.00" above the **Subtotal** amount.
   2. Click the **Clear** button beside the amount to display the **Confirmation** window.
   3. Click the **Yes** button to remove the payment from the **Cash Register** screen.
6. Continue with the procedure below.

Accept a Debit Card Payment

1. Click the **Debit** button to display the **Confirm Payment Amount** window.
2. Enter the amount to be charged in the **Amount Tendered** field.
3. Click the **OK** button to display the **Make Payment** window.
4. Complete one of the following procedures as appropriate:
   - Use the card reader:
     1. Click the **Swipe** button to change the **Make Payment** window.
     2. Swipe the card through the card reader to populate fields.
     3. Complete unpopulated fields as required.
     4. Click the **Run** button to display results in the **Make Payment** window.
   - Manually enter card data:
     1. Enter values in fields as required.
     2. Click the **Run** button to display results in the **Make Payment** window.
5. If the card is approved, click the **OK** button to display "**Debit**" and the amount tendered above the **Subtotal** amount.

   Note: If the card is not approved,
   1. Click the **OK** button to display "**Debit**" and "0.00" above the **Subtotal** amount.
   2. Click the **Clear** button beside the amount to display the **Confirmation** window.
   3. Click the **Yes** button to remove the payment from the **Cash Register** screen.
6. Continue with the procedure below.

Accept a Check Payment

1. Click the **Check** button to display the **Confirm Payment Amount** window.
2. Enter the check number in the **Check Number** field.
3. Enter the amount of the check in the **Amount Tendered** field.
4. Click the **OK** button to display "**Check**" and the amount tendered above the **Subtotal** amount.
5. Continue with the procedure below.

Accept a Gift Card Payment

1. Click the **Gift** button to display the **Make Payment With Gift Card** window.
2. Enter/scan the gift card number in the **Enter card number** field to display the **Gift Card Balance**.
3. Enter the amount to be redeemed in the **Amount** field.
4. Click the **OK** button to display "**Gift**" and the amount tendered above the **Subtotal**amount.
5. Continue with the procedure below.

Credit a Deposit

1. Click the **Current** tab to display the **Current** window.

   Note: If necessary, click the expand button beside the **Deposits** heading to display the customer's deposits.

2. Locate the deposit to be applied to this transaction.
3. Click the deposit's **Move to Register** button to display "**Deposit**" and the total deposit amount above the **Subtotal** amount.
4. Address any difference between the total amount due and the deposit amount as appropriate:
   - If the total transaction amount is greater than the deposit amount, apply additional tender type(s) as needed and continue with the procedure below.
   - If the total transaction amount is less than the deposit amount, complete either of the following procedures as appropriate to address the deposit's remaining balance:

     - **Refund the Deposit's Remaining Balance to the Customer**:
       1. Determine what tender type (e.g., cash, check) will be used to refund the balance.
       2. Click the corresponding tender type (i.e., **Cash**) button to display the **Confirm Return Amount** window.
       3. Enter the amount to be returned in the **Amount** field.
       4. Click the **OK** button to display the tender type and the entered amount above the **Deposit** amount on the **Cash Register** screen.
       5. Continue with the procedure below and issue the refund when .
     - **Create a New Deposit from the Deposit's Remaining Balance**:
       1. Click the **Deposit** button to display the **Confirm Deposit Amount** window.
       2. Enter the desired amount (all or part of the remaining balance) in the **Amount** field, enter a unique description in the **Description** field, and click the **OK** button to add the new deposit amount to the current transaction on the **Cash Register** screen. Refer to Receive a Deposit (see page 110) for more information.
       3. Continue with the procedure below.

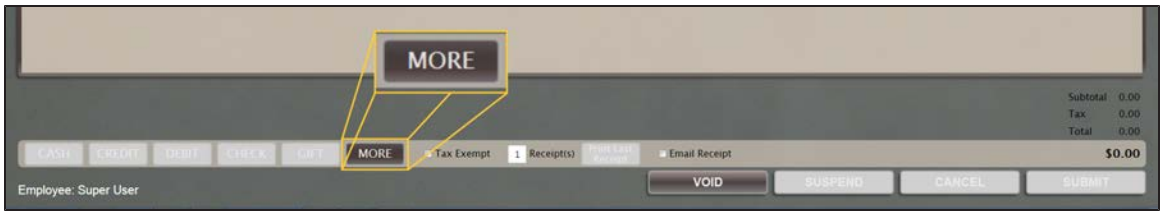
Accept a Charge to a House Account	1. Click the **Acct** button to display the **Confirm Payment Amount** window. **Note:** This button is available only if the selected customer has an active house account. 2. Enter the amount the amount to be charged to the account in the **Amount Tendered** field. 3. Click the **OK** button to display "**Account**" and the amount tendered above the **Subtotal** amount. 4. Continue with the procedure below.
Accept a User-Defined Payment Type	1. Click the **More** button to display additional tender buttons on the **Cash Register** screen. **Note:** Additional tender buttons may be defined in the **Data Center** application. Refer to Manage POS Options for more information. 2. Click the appropriate tender button to display the **Confirm Payment Amount** window. 2. Enter the amount of tender provided in the **Amount Tendered** field. 3. Click the **OK** button to display the tender name and the amount tendered above the **Subtotal** amount. 4. Continue with the procedure below.
Remove a Payment	1. Locate the payment to be removed (tender type and amount) above the **Subtotal** amount near the bottom of the **Cash Register** screen. 2. Click the payment's **Clear** button to display the **Confirmation** window. 3. Click the **Yes** button to remove the payment from the **Cash Register** screen.
Record an Outgoing Payment	Refer to Record a Paid Out Amount (see page 29) for more information.

5. When the amount(s) entered are equal to or greater than the **Total** amount due, click the **Submit** button to display the **Transaction Complete** window showing the change amount.
6. Click the **OK** button to close the **Transaction Complete** window and display an empty **Cash Register** screen cash.

Record a Paid Out Amount

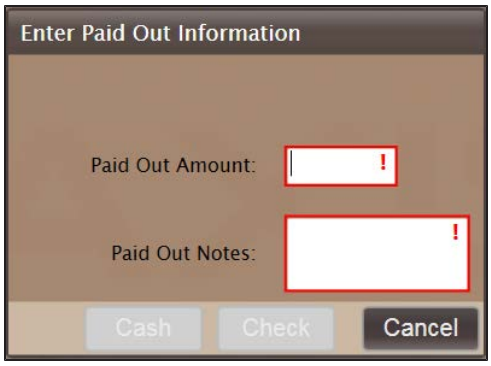
Complete the following procedure to record funds paid out from a POS.

1. Navigate to a blank **Cash Register** screen.



2. Click the **More** button to display the **Paid Out** button on the **Cash Register** screen.

3. Click the **Paid Out** button to display the **Enter Paid Out Information** window.

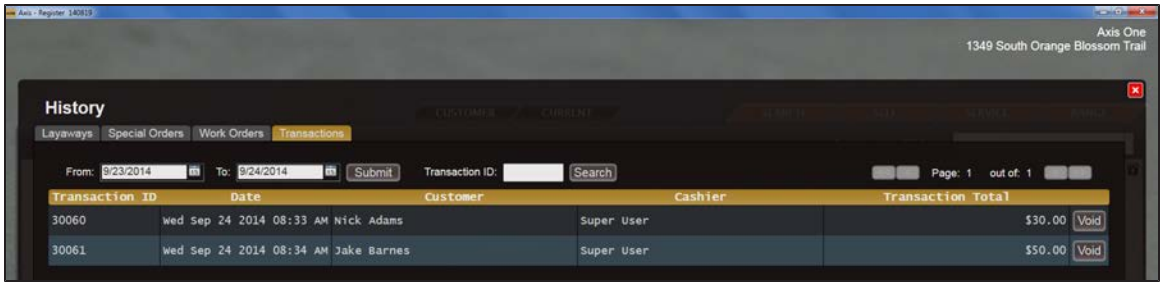


4. Enter the amount in the **Paid Out Amount** field.
5. Enter explanatory text in the **Paid Out Notes** field and display the **Cash** and **Check** buttons.
6. Click the appropriate tender button:
   - If the amount was paid out in cash, click the **Cash** button to add the payout to the **Cash Register** screen.
   - If the amount was paid out by check, click the **Check** button to display a new window. Enter the check number in the **Check Number** field and click the **Submit** button to add the payout to the **Cash Register** screen.

7. Click the **Submit** button to display the **Transaction Complete** window showing the change amount.
8. Click the **OK** button to close the **Transaction Complete** window and display an empty **Cash Register** screen cash.

Search the Transaction History

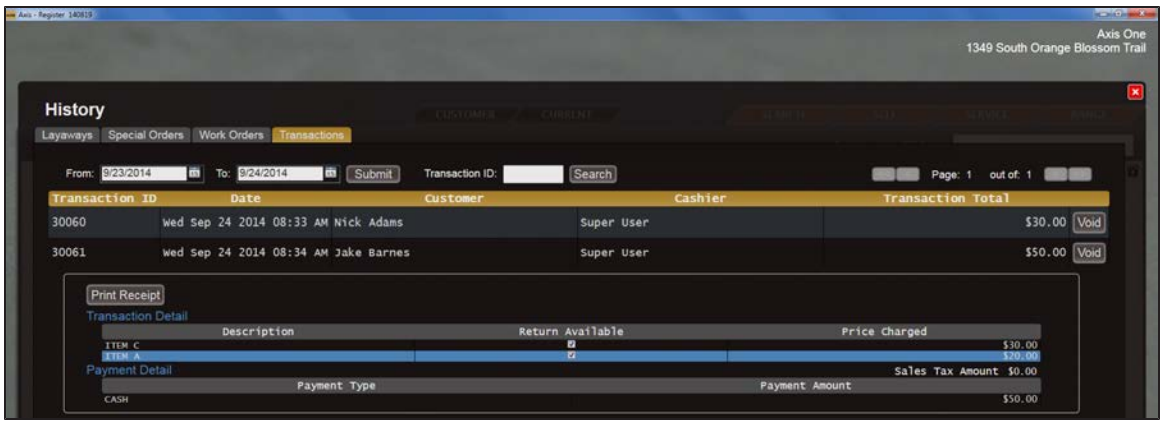
1. Clear the Customer Selection (see page 44).
2. Click the **History** tab to display the **History** window.
3. Click the **Transactions** tab to display completed transactions.



4. Complete the following procedures as desired to locate the desired transaction:

Search Transactions by Date	1. Enter dates in the **From** and **To** fields and click the **Submit** button to display all transactions from that timeframe. 2. Click the page navigation buttons to move from one page to another: • Click the **<< (First Page)** button to display the first page of the record. • Click the **< (Previous Page)** button to display the preceding page of the record. • Click the **> (Next Page)** button to display the following page of the record. • Click the **>> (Last Page)** button to display the last page of the record. 3. Continue with the procedure below.
Search Transactions by ID Number	1. Enter the transaction ID number in the **Transaction ID** field. 2. Click the **Search** button to display that transaction. 3. Continue with the procedure below.

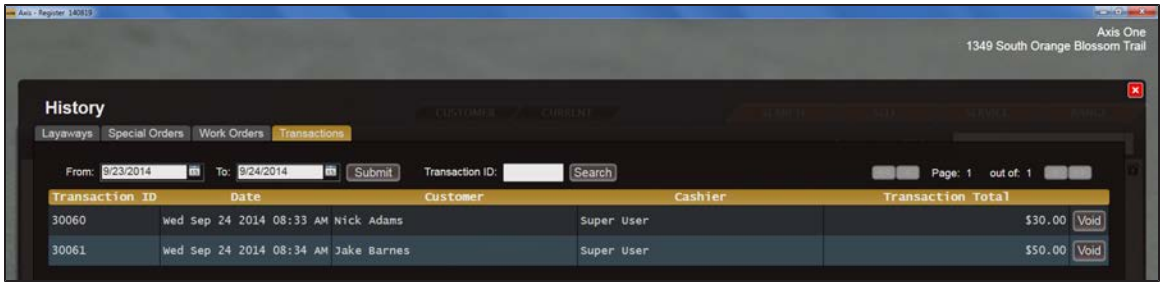
5. Click a transaction to display its **Transaction Detail** and **Payment Detail** record and the **Print Receipt** button.



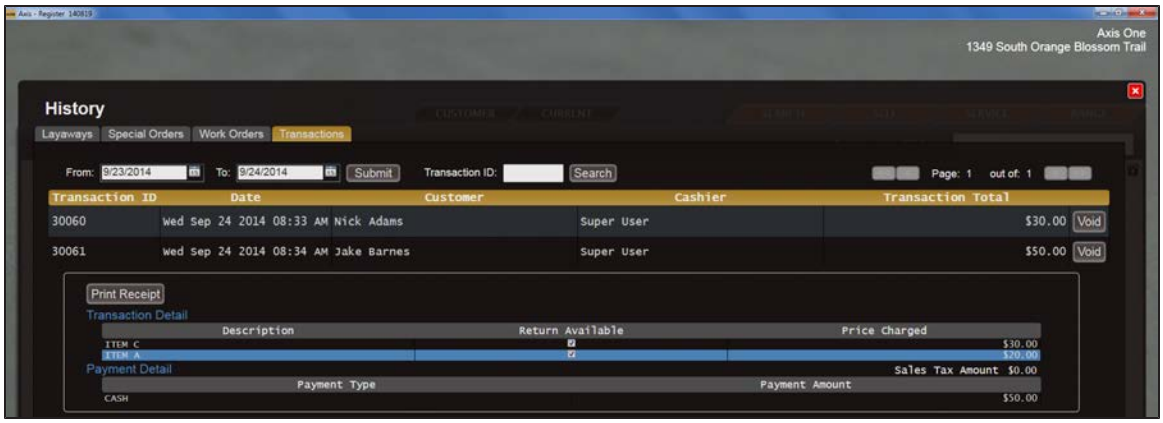
6. When finished, click the **Close** button to close the **History** window.

Process a Return

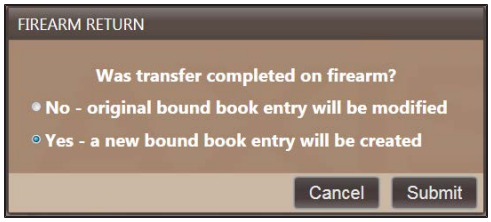
1. Clear the Customer Selection (see page 44).
2. Click the **History** tab to display the **History** window.
3. Click the **Transactions** tab to display completed transactions.



4. Search the Transaction History (see page 30) as needed to display the transaction.
5. Click the transaction to display its detail record.



6. Note the **Return Available** checkbox for the item to be returned:
   - If the box is not checked (empty), the item may not be returned.
   - If the box is checked (filled), the item may be returned. Proceed to the next step.
7. Double-click the item to add the return to the **Cash Register** screen and close the **History** window.
8. If the returned item was a firearm, the system displays the **Firearm Returned** window.



   Complete the following procedure to close the window:

   1. Click the appropriate selection button:
      - If the firearm was never transferred to the customer, click the **No - original bound book entry will be modified** button.
      - If the firearm was transferred to the customer at some point, click the **Yes - a new bound book entry will be created** button.
   2. Click the **Submit** button.
9. Complete the transaction (refund, charge back, etc.).

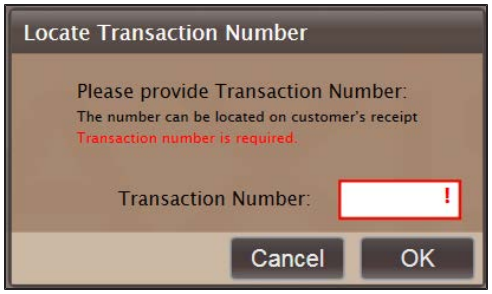
Void a Transaction

Note: Only transactions from the current day may be voided.

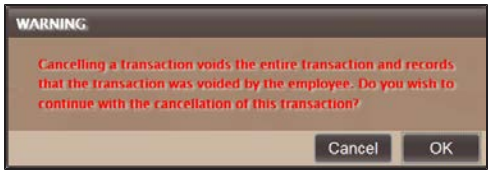
1. Clear the Customer Selection (see page 44).
2. Complete one of the following procedures as appropriate to void the desired transaction:

Void a Transaction from the Cash Register Screen

1. Clear the Customer Selection (see page 44).
2. Click the **Void** button to display the **Locate Transaction Number** screen.



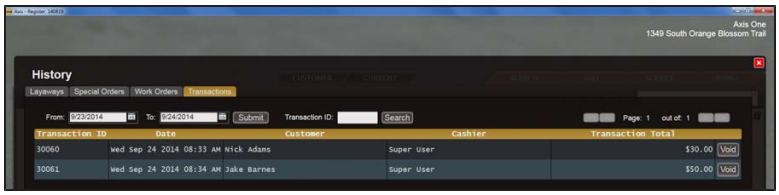
3. Enter the transaction number in the **Transaction Number** field.
4. Click the **OK** button to display the **Warning** window.



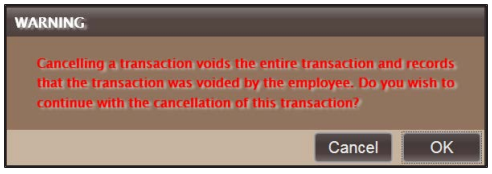
5. Continue with the procedure below.

Void a Transaction from the Transaction History

1. Clear the Customer Selection (see page 44).
2. Click the **History** tab to display the **History** window.
3. Click the **Transactions** tab to display completed transactions.
4. Search the Transaction History (see page 30) as needed to display the transaction.



5. Click the transaction's **Void** button to display the **Warning** window.



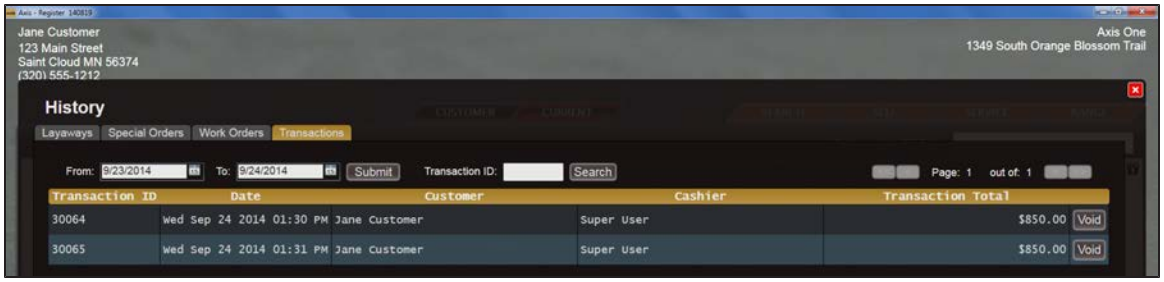
6. Continue with the procedure below.

3. Click the **OK** button to add the voided transaction to the **Cash Register** screen.

4. Complete the voided transaction (refund, charge back, etc.).

Search a Customer's Transaction History

1. Identify the Customer (see page 17).
2. Click the **History** tab to display the **History** window.
3. Click the **Transactions** tab to display the customer's completed transactions.



4. Complete the following procedures as desired to locate the desired transaction:

Search Transactions by Date	1. Enter dates in the **From** and **To** fields and click the **Submit** button to display all transactions from that timeframe. 2. Click the page navigation buttons to move from one page to another: • Click the **<< (First Page)** button to display the first page of the record. • Click the **< (Previous Page)** button to display the preceding page of the record. • Click the **> (Next Page)** button to display the following page of the record. • Click the **>> (Last Page)** button to display the last page of the record. 3. Continue with the procedure below.
Search Transactions by ID Number	1. Enter the transaction ID number in the **Transaction ID** field. 2. Click the **Search** button to display that transaction. 3. Continue with the procedure below.

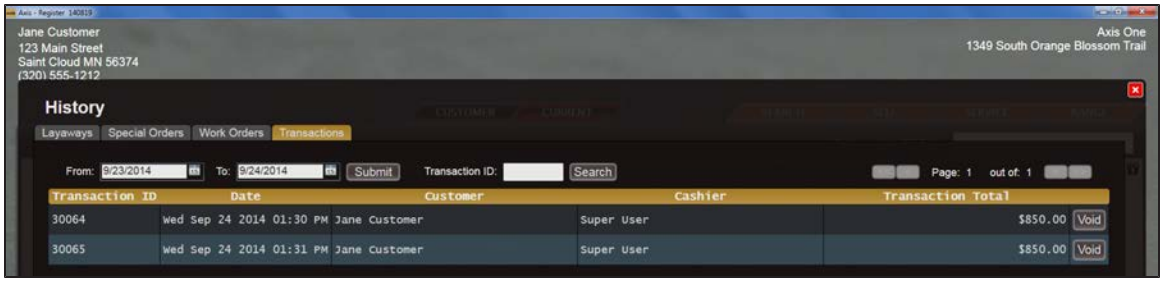
5. Click a transaction to display its **Transaction Detail** and **Payment Detail** record and the **Print Receipt** button.

6. When finished, click the **Close** button to close the **History** window.

Process a Customer's Return

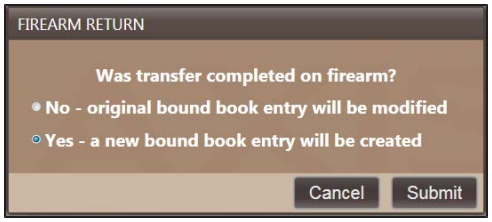
Note: Refer to Process a Return from a Customer's Layaway History (see page 100) for information on returning an item that had been purchased on layaway.

1. Identify the Customer (see page 17).
2. Click the **History** tab to display the **History** window.
3. Click the **Transactions** tab to display the customer's completed transactions.



4. Search a Customer's Transaction History (see page 34) as needed to display the transaction.
5. Click the transaction to display its detail record.

6. Note the **Return Available** checkbox for the item to be returned:
   - If the box is not checked (empty), the item may not be returned.
   - If the box is checked (filled), the item may be returned. Proceed to the next step.
7. Double-click the item to add the return to the **Cash Register** screen and close the **History** window.
8. If the returned item was a firearm, the system displays the **Firearm Returned** window.



Complete the following procedure to close the window:

1. Click the appropriate selection button:
   - If the firearm was never transferred to the customer, click the **No - original bound book entry will be modified** button.
   - If the firearm was transferred to the customer at some point, click the **Yes - a new bound book entry will be created** button.

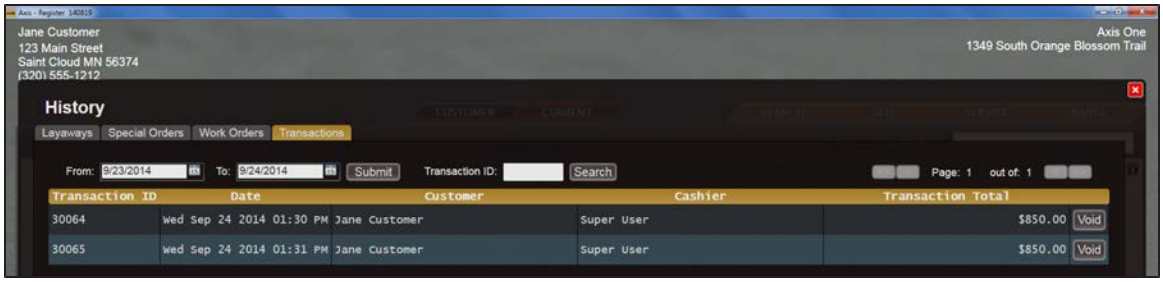
2. Click the **Submit** button.

9. Complete the transaction (refund, charge back, etc.).

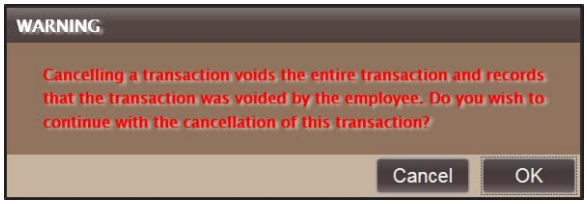
Void a Customer's Transaction

Note: Only transactions from the current day may be voided.

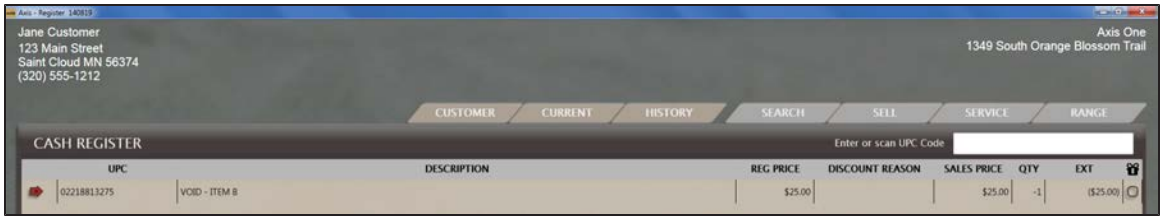
1. Identify the Customer (see page 17).
2. Click the **History** tab to display the **History** window.
3. Click the **Transactions** tab to display the customer's completed transactions.



4. Search a Customer's Transaction History (see page 34) as needed to display the transaction.
5. Click the transaction's **Void** button to display the **Warning** window.



6. Click the **OK** button to add the voided transaction to the **Cash Register** screen.



7. Complete the voided transaction (refund, charge back, etc.).

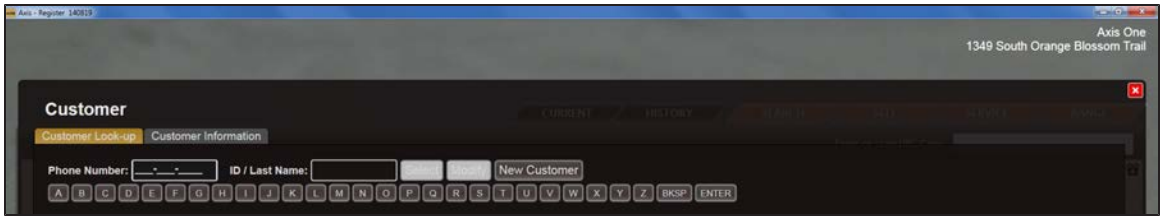
Customer Information

This section contains procedures to create, select, modify, and review customer information records in the **Register** application.

- Identify the Customer (see page 17)
  Complete this procedure to associate a new or existing customer with a transaction.
- Set Up and Edit a Customer Record (see page 40)
  Complete this procedure to create or modify a customer's information.
- Clear the Customer Selection (see page 44)
  Complete this procedure to deselect the currently selected customer in order to select a different customer or perform a non-customer-specific procedure.

Set Up and Edit a Customer Record

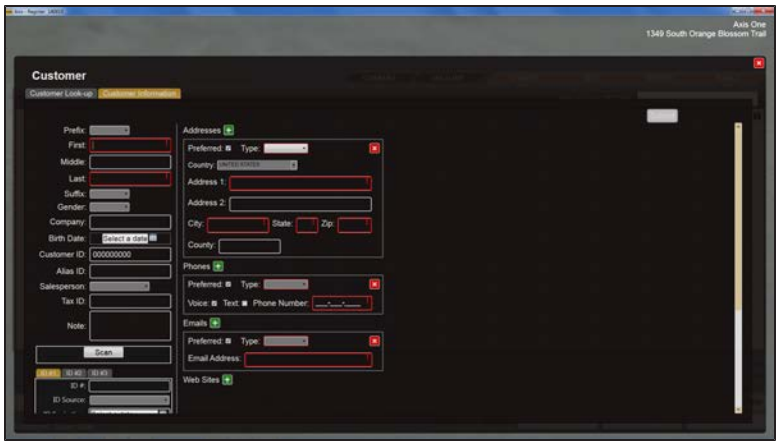
1. Click the **Customer** tab to display the **Customer** window.



2. Complete the following procedures as appropriate to maintain customer records:

Set Up a New Customer Record

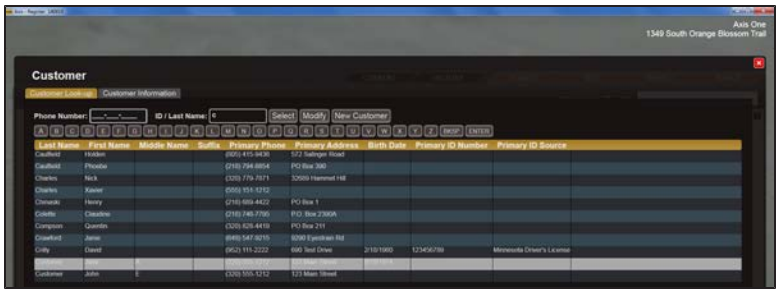
1. Click the **New Customer** button to display the **Customer Information** tab.



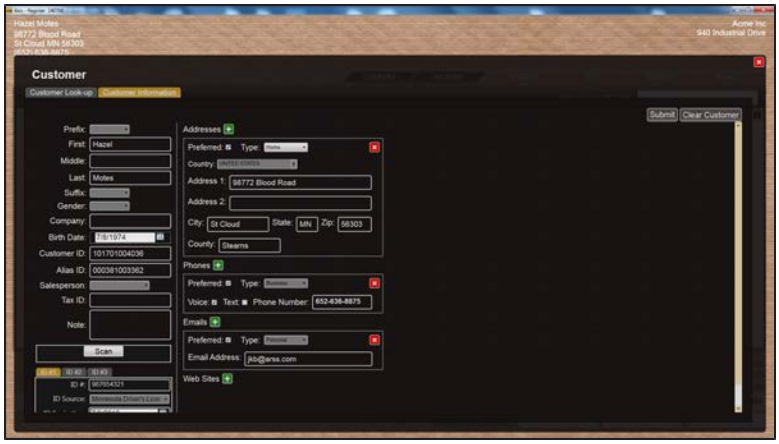
2. Continue with the procedure below.

Edit an Existing Customer Record

1. Complete either of the following to enter search criteria and display all matching customers:
   - Click in the **Phone Number** field and enter the customer's phone number.
   - Click in the **ID/LastName** field and use the keyboard or onscreen letter buttons to enter the customer's last name or customer ID. Then click the **Enter** button (or press the **Enter** key on the keyboard) to display search results.



2. Click the customer record to select (highlight) it.
3. Click the **Modify** button to display the customer's **Customer Information** page.



4. Continue with the procedure below.

3. Enter/edit the customer's information.

Note: Required fields and settings are displayed with red borders. Some fields may not be present in all situations.

Note: If the customer has a government-issued ID, click the **Scan** button to scan it and automatically fill certain fields.

Prefix	Select a prefix from the drop-down menu.
First	Enter the customer's first name.
Middle	Enter the customer's middle name.
Last	Enter the customer's last name.
Suffix	Select a suffix from the drop-down menu.
Gender	Select a gender from the drop-down menu.

Company	Enter the customer's company name.	
Birth Date	Enter the customer's birth date (mm/dd/yyyy) or Select a Date with the calendar button.	
Customer ID	The system automatically generates a unique number and assigns it to the customer.	
Alias ID	Enter a unique retailer-generated number per store policy.	
Salesperson	Select the appropriate salesperson from the drop-down menu.	
Tax ID	Enter the customer's unique, government-issued number to designate tax-exempt status for the customer.	
ID #1; **ID #2**; **ID #3**	Enter up to three unique ID records. Click a tab to display the fields for that record.	
	ID Number/#	Enter the ID number.
	ID Source	Select the ID source from the drop-down menu.
	ID Expiration	Enter the ID expiration date (mm/dd/yyyy) or Select a Date with the calendar button.
FFL	Enter the customer's FFL number.	
Note	Enter a brief explanatory note about the customer to be displayed at the Register.	
Scan	Click the button to scan the customer's government-issued ID and automatically fill certain fields.	
Addresses	If an address record is not needed, click its **Close** (red **X**) button to close it. If an additional address record is needed, click the **Add** (green **+**) button to open it.	
	Preferred	If this address record is the preferred method of contact, check the checkbox.
	Type	Select the appropriate value from the drop-down menu.
	Country	Select the country from the drop-down menu.
	Address 1	Enter the first line of the street address.
	Address 2	Enter the second line of the street address (if applicable).
	City	Enter the city.
	State	Enter the two-letter abbreviation for the state.
	Zip	Enter the ZIP code.
	County	Enter the county.
Phones	If a phone record is not needed, click its **Close** (red **X**) button to close it. If an additional phone record is needed, click the **Add** (green **+**) button to open it.	
	Preferred	If this phone record is the preferred method of contact, check the checkbox.
	Type	Select the appropriate value from the drop-down menu.
	Voice	If this phone number can receive voice calls, check the checkbox.

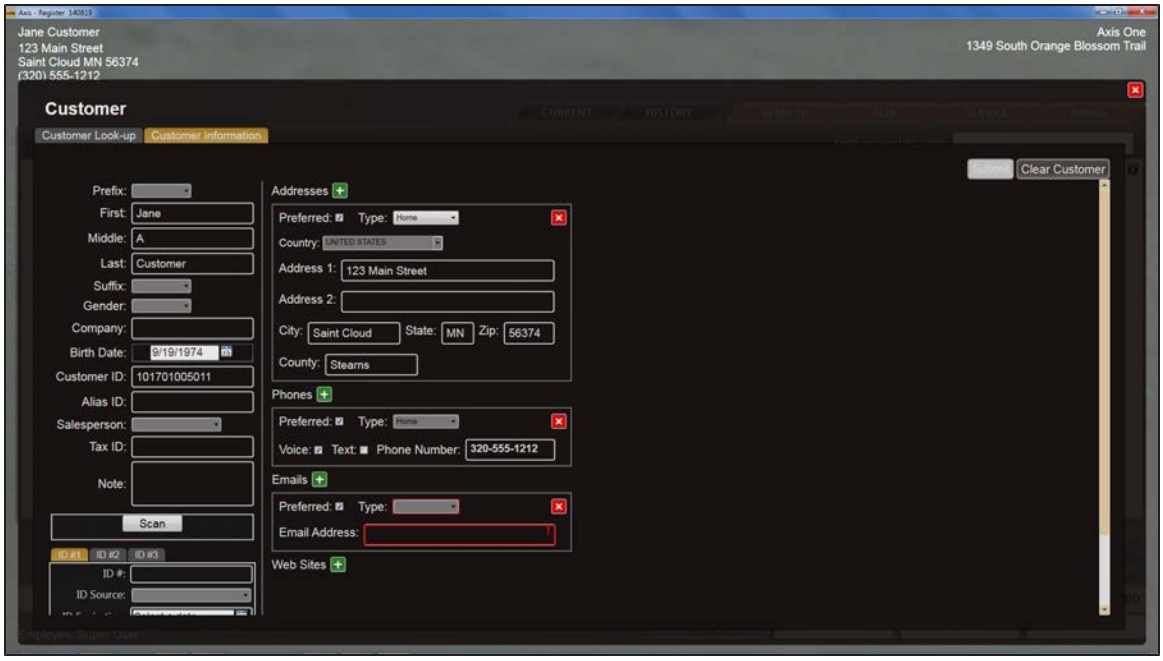
	Text	If this phone number can receive text messages, check the checkbox.
	Phone Number	Enter the entire (xxx-xxx-xxxx) phone number.
Emails	If an email record is not needed, click its **Close** (red **X**) button to close it. If an additional email record is needed, click the **Add** (green **+**) button to open it.	
	Preferred	If this email record is the preferred method of contact, check the checkbox.
	Type	Select the appropriate value from the drop-down menu.
	Email Address	Enter the entire email address.
Web Sites	If a website record is not needed, click its **Close** (red **X**) button to close it. If an additional website record is needed, click the **Add** (green **+**) button to open it.	
	Preferred	If this website record is the preferred method of contact, check the checkbox.
	Type	Select the appropriate value from the drop-down menu.
	URL Address	Enter the website's URL address.

4. When finished, click the **Submit** button to retain this customer record and return to the **Cash Register** screen.

Clear the Customer Selection

Note: This procedure is available only if a customer is currently selected.

1. Click the **Customer** tab to display the **Customer** window.



2. Click the **Clear Customer** button to clear the system for selection of another customer.

Firearms

- Sell a Firearm through the Register Application (see page 46)
- Exclude a Firearm Transaction from a Waiting Period (see page 50)
- View a Customer's Current Firearm Transactions (see page 47)
- Move a Firearm Transaction to the Cash Register Screen (see page 48)
- Transfer a Firearm to a Customer from the Current Window (see page 49)

Sell a Firearm through the Register Application

1. Identify the Customer (see page 17).
2. Click the **Search** tab to display the **Product Search** window.
3. Click the **Firearm Inventory** tab to display a list of firearms.

   Note: If the **Firearm Inventory** tab does not appear on the screen, firearms may not be sold through the **Register** application.

4. Double-click a firearm to display the **Customer Information** window.

5. Complete the fields as needed.
6. Click the **Submit** button to add the firearm transaction to the **Cash Register** screen.

   Note: If the **Waiting Period Required** window appears, click the **Continue** button to close the window. In some cases, a manager may exclude the firearm from the waiting period. Refer to Exclude a Firearm Transaction from a Waiting Period (see page 50) for more information.

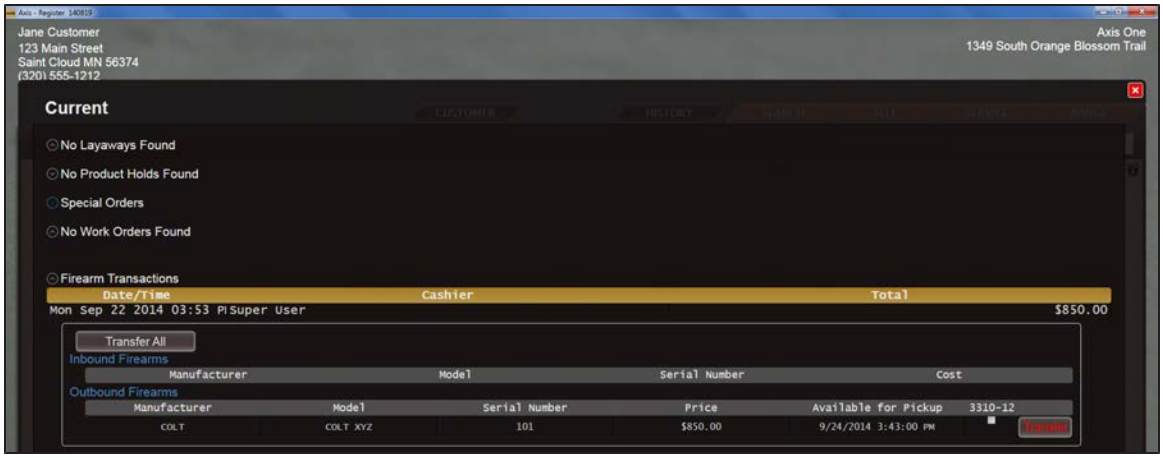
7. Accept Payment for a Transaction (see page 24).
8. Complete one of the following:
   - If no additional waiting period is required, transfer the firearm to the customer.
   - If a waiting period is required, the firearm transaction will be listed on the customer's **Current** window and the firearm must be retained until the period expires. After the period expires, the firearm may be transferred to the customer. Refer to Transfer a Firearm to a Customer from the Current Window (see page 49) for more information.

View a Customer's Current Firearm Transactions

1. Identify the Customer (see page 17).
2. Click the **Current** tab to display the **Current** window.

   Note: If necessary, click the expand button beside the **Firearm Transactions** heading to display the customer's current firearm transactions.

3. Click a firearm to display details.



4. Double-click the details record to close it.
5. Click the **Close** button to close the **Current** window.

Move a Firearm Transaction to the Cash Register Screen

1. Identify the Customer (see page 17).
2. Click the **Current** tab to display the **Current** window.

   Note: If necessary, click the expand button beside the **Firearm Transactions** heading to display the customer's current firearm transactions.

3. Click a firearm to display details.

4. Locate the **Move to Register** button.

   Note: If the **Move to Register** button is not present, the firearm has already been processed through the register and does not need to be moved to the **Cash Register** screen.

5. Click the **Move to Register** button to add the firearm transaction to the **Cash Register** screen and close the **Current** window.

   Note: If the **Waiting Period Required** window appears, click the **Continue** button to close the window. In some cases, a manager may exclude the firearm from the waiting period. Refer to Exclude a Firearm Transaction from a Waiting Period (see page 50) for more information.

6. Accept Payment for a Transaction (see page 24).
7. Complete one of the following:
   - If no additional waiting period is required, transfer the firearm to the customer.
   - If a waiting period is required, the firearm transaction will be listed on the customer's **Current** window and the firearm must be retained until the period expires. After the period expires, the firearm may be transferred to the customer. Refer to Transfer a Firearm to a Customer from the Current Window (see page 49) for more information.

Transfer a Firearm to a Customer from the Current Window

1. Identify the Customer (see page 17).
2. Click the **Current** tab to display the **Current** window.

   Note: If necessary, click the expand button beside the **Firearm Transactions** heading to display the customer's current firearm transactions.

3. Click a firearm to display details.

4. Locate the firearm's **Transfer** button:
   - If the text on the button is white, click the **Transfer** button to add the firearm transaction to the **Cash Register** screen.
   - If the text on the button is red, the firearm is subject to a waiting period and must be retained until the period expires. After the period expires, the button text will be white and this procedure may be completed.

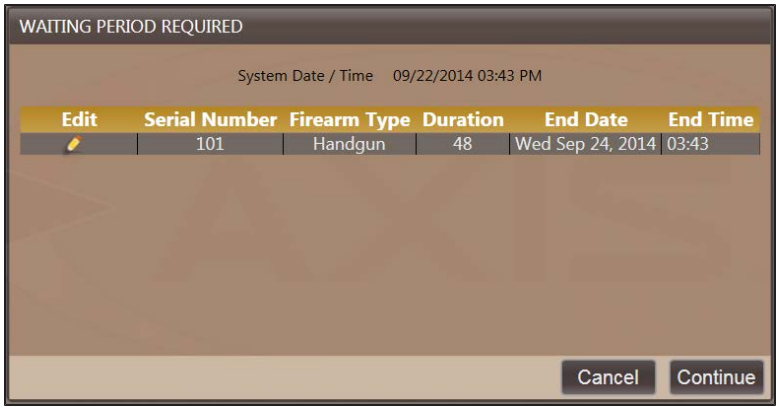
     Note: If the red **Transfer** button is clicked, the system displays a **Waiting Period Required** window. In some cases, a manager may exclude the firearm from the waiting period. Refer to Exclude a Firearm Transaction from a Waiting Period (see page 50) for more information.

5. Complete the transaction and transfer the firearm to the customer.

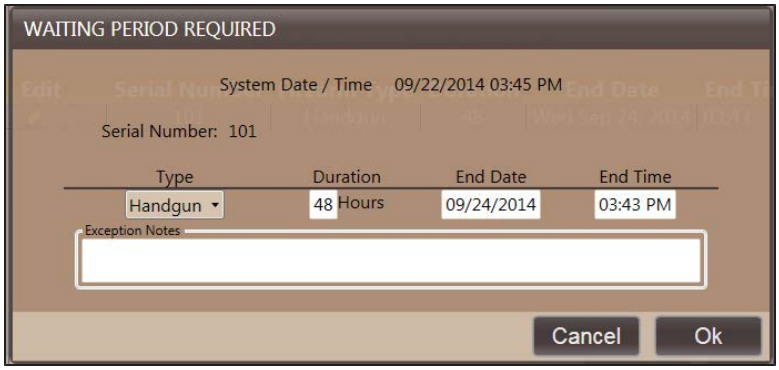
Exclude a Firearm Transaction from a Waiting Period

1. Add a firearm transaction to the **Cash Register** screen to display the **Waiting Period Required** window.

   Note: Refer to Sell a Firearm through the Register Application (see page 46) for more information.



2. Click the **Edit** button to display a **Waiting Period Required** details screen.



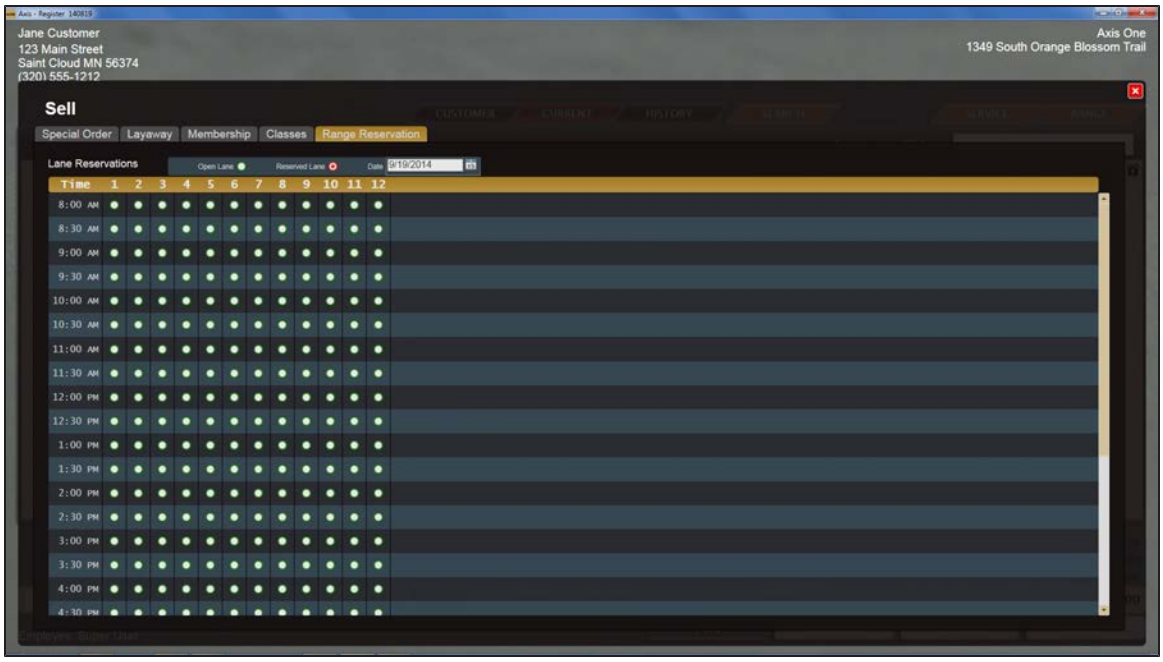
3. Enter today's date in the **End Date** field.
4. Enter a time earlier than the current time in the **End Time** field.
5. Enter a brief explanation in the **Exception Notes** field.
6. Click the **OK** button to continue with the firearm transaction.

Range and Range Reservations

- Reserve a Range Time (see page 52)
- View a Customer's Upcoming Range Reservations (see page 53)
- Review All Range Reservations (see page 55)
- Cancel a Range Reservation (see page 54)
- Add a Range Customer to the Range Queue (see page 56)
- Open a Range Customer's Party Control Window (see page 57)
- Verify a Customer's Range Waiver (see page 58)
- Rent a Firearm to a Range Customer (see page 63)
- Retrieve a Rental Firearm from a Range Customer (see page 64)
- Turn a Range Lane On or Off (see page 59)
- Assign a Range Customer to a Lane (see page 60)
- Add a Secondary Shooter to a Range Customer's Party (see page 61)
- Move a Range Customer to a Different Lane (see page 62)
- End a Range Customer's Lane Time (see page 65)
- Complete a Range Customer's Transaction (see page 66)
- End a Range Customer's Range Session (see page 67)

Reserve a Range Time

1. Identify the Customer (see page 17).
2. Click the **Sell** tab to display the **Sell** window.
3. Click the **Range Reservation** tab to display the **Range Reservation** page.



4. Select/enter the desired reservation date in the **Date** field.
5. Locate the green **Open Lane** button where the desired time and lane intersect.

   Note: If the button in this location is already red and filled, this time/lane combination has already been reserved. Locate another time/lane combination as appropriate.

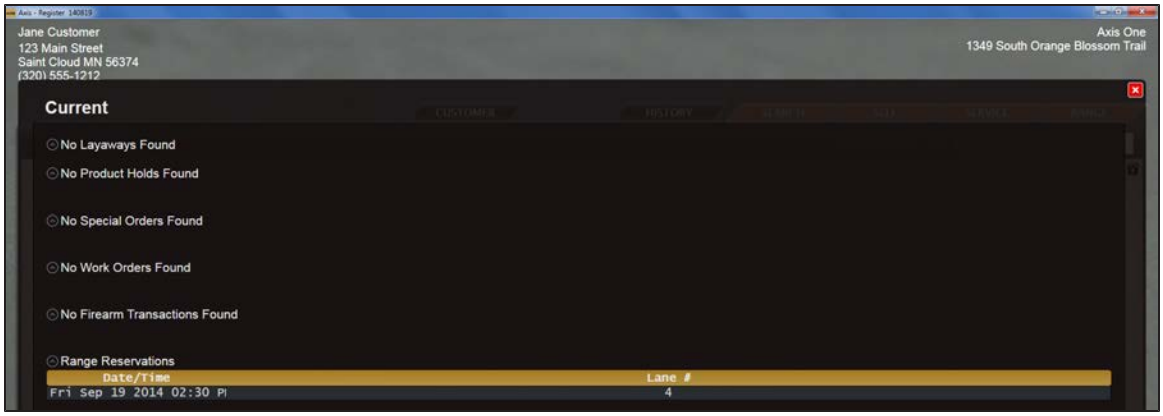
6. Click the green **Open Lane** button for the desired time/lane combination to mark it reserved (red and filled).
7. Repeat steps as needed to reserve additional dates, times, and lanes.
8. Click the **Close** button to close the **Sell** window and add the reservation(s) to the **Cash Register** screen.

9. Complete the transaction.

View a Customer's Upcoming Range Reservations

1. Identify the Customer (see page 17).
2. Click the **Current** tab to display the **Current** window.

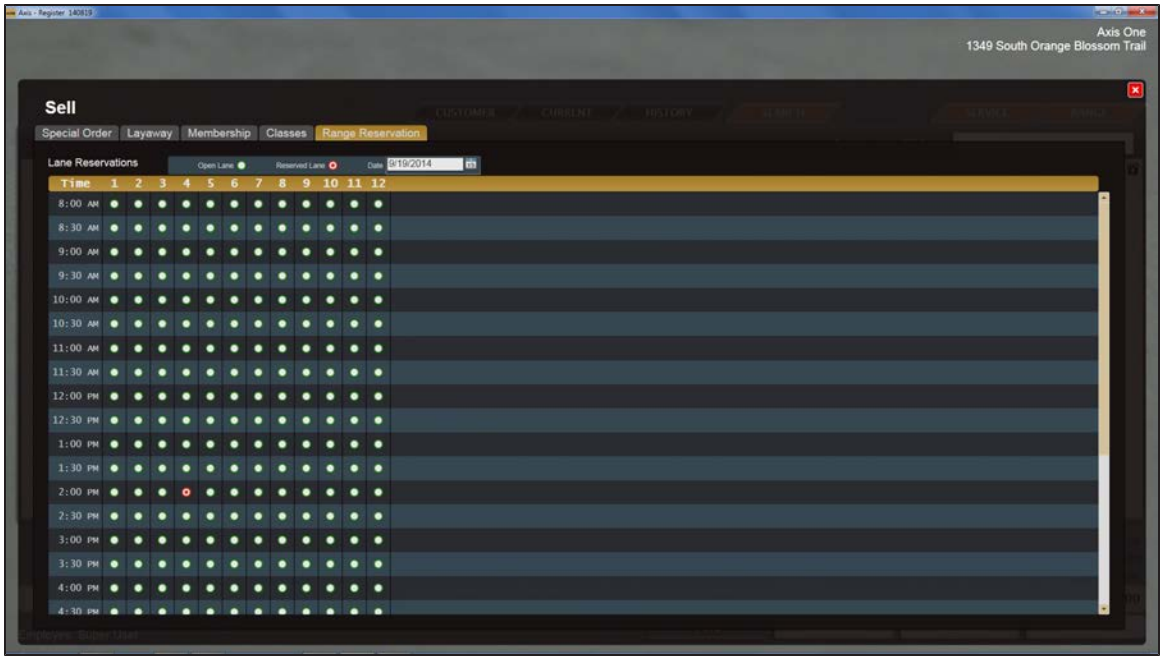
   Note: If necessary, click the expand button beside the **Range Reservations** heading to display the customer's upcoming reservations.



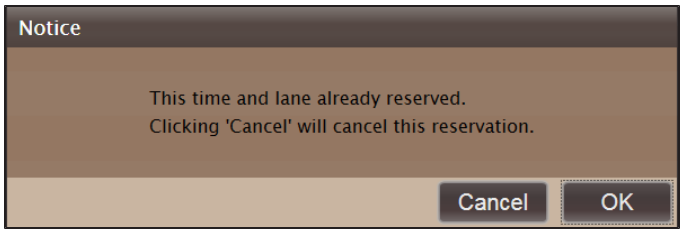
3. When finished, click the **Close** button to close the **Current** window.

Cancel a Range Reservation

1. Click the **Sell** tab to display the **Sell** window.
2. Click the **Range Reservation** tab to display the **Range Reservation** page.



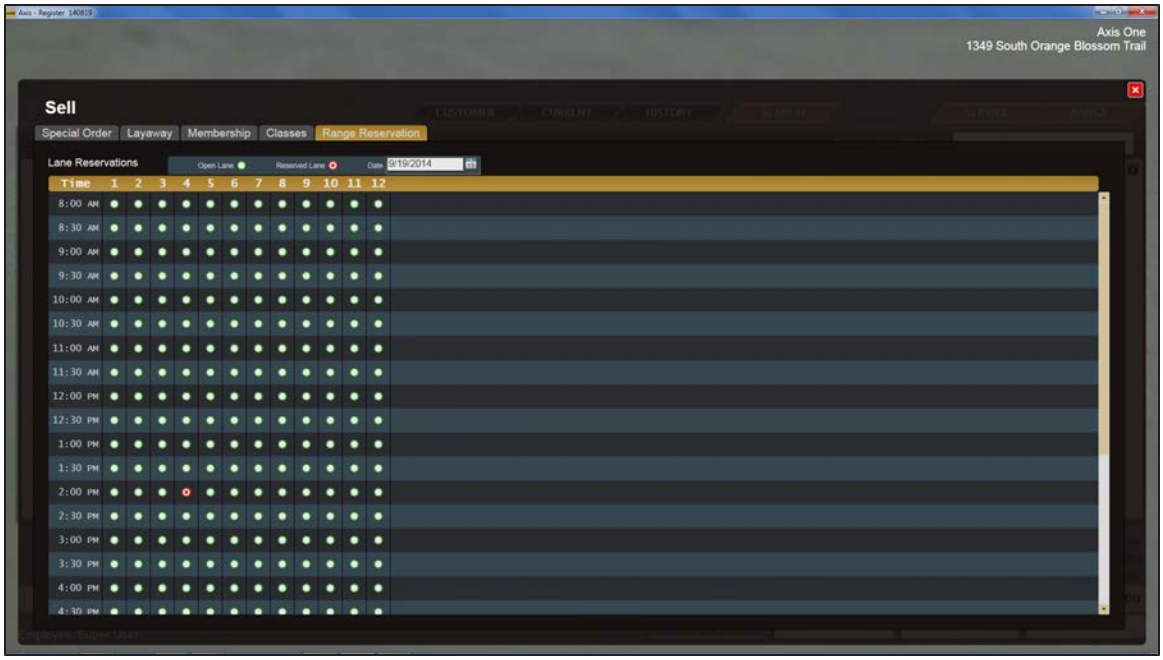
3. Select/enter the reservation's date in the **Date** field.
4. Locate the red **Reserved Lane** button where the reservation time and lane intersect.
5. Click the red **Reserved Lane** button to display the **Notice** window.



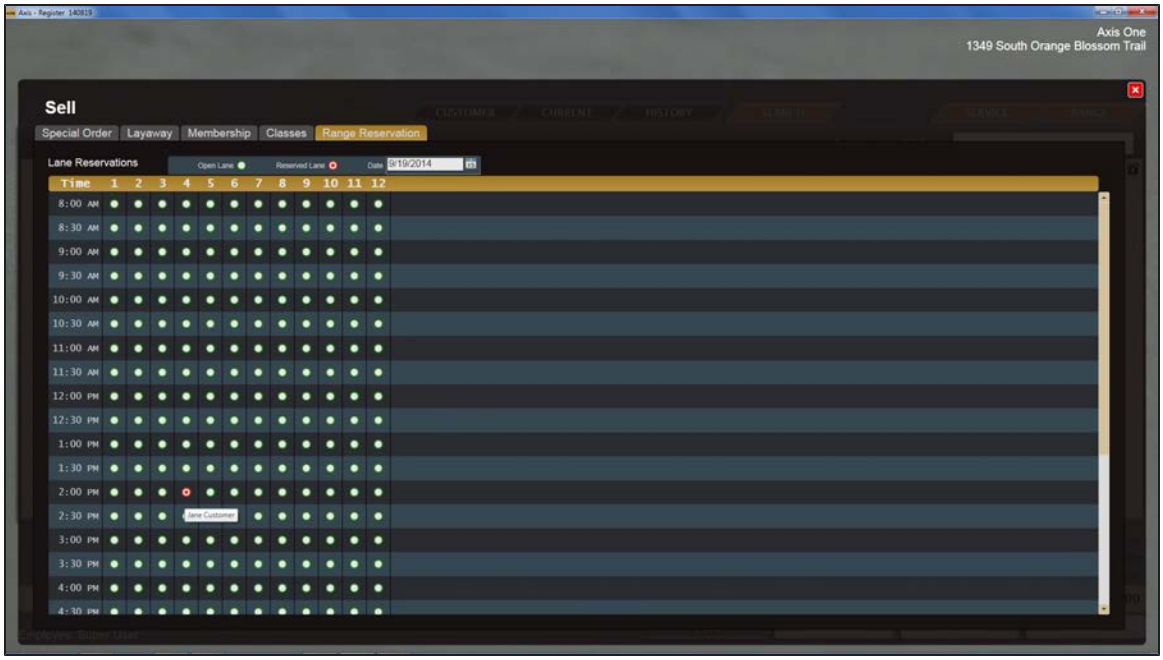
6. Click the **Cancel** button to cancel the reservation and mark the lane as open (green).
7. Click the **Close** button to close the **Sell** window.

Review All Range Reservations

1. Click the **Sell** tab to display the **Sell** window.
2. Click the **Range Reservation** tab to display the **Range Reservation** page.



3. Select/enter the desired date to review in the **Date** field.
4. Hover over a red **Reserved Lane** button to display the customer who reserved that time/lane combination.



5. Click the **Close** button to close the **Sell** window.

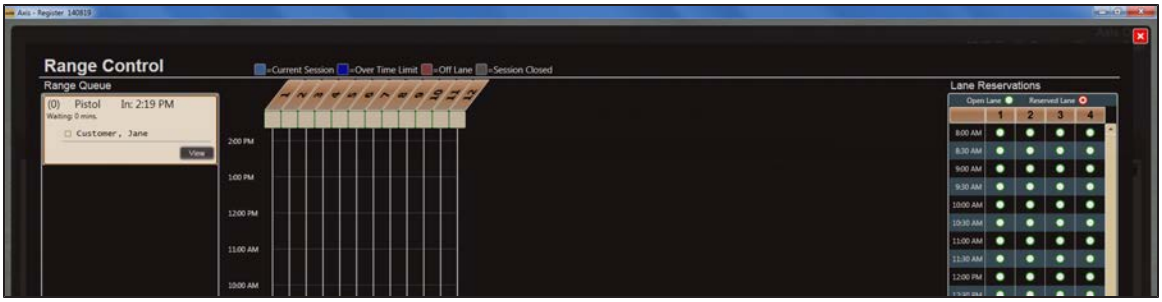
Add a Range Customer to the Range Queue

1. Identify the Customer (see page 17).
2. Select a primary shooter product as a transaction item to add it to the **Cash Register** screen.

   Note: Refer to Add an Item to a Transaction (see page 19) for more information on identifying the appropriate range product.

3. Select any additional items (ammunition, eye/ear protection, gun rental, etc.) to add them to the transaction.
4. Click the **Range** tab to display the **Range Control** window and add the customer to the **Range Queue**.

   Note: The system automatically suspends the transaction while the customer is on the range.



5. Note the box to the left of the customer's name to determine his/her range waiver status:
   - If the box is green (filled), the customer has a signed range waiver on file and may be assigned to a lane when one is available. .
   - If the box is empty, the customer does not have a signed range waiver on file and may not be assigned a lane. Have the customer complete a paper or electronic waiver before proceeding. Refer to Verify a Customer's Range Waiver (see page 58) for more information.
6. When appropriate, Assign a Range Customer to a Lane (see page 60).

Open a Range Customer's Party Control Window

1. Click the **Range** tab to display the **Range Control** window.
2. Complete the appropriate procedure to open the range customer's **Party Control** window:
   - If the range customer is in the **Range Queue**, click the **View** button to display the **Party Control** window.
   - If the range customer has been assigned a lane, click the customer's marker in the assigned lane timeline to display the **Party Control** window.

3. Determine the range customer's status by observing the colors of the associated buttons:
   - A green **P (Paper Waiver)** button indicates the customer has completed a paper range waiver.
   - A green **E (Electronic Waiver)** button indicates the customer has completed an electronic range waiver.
   - A pink **Rental Firearm** button indicates the customer is currently renting a firearm.
   - A blue **Transaction** button indicates the customer has an outstanding balance on a suspended transaction.

Verify a Customer's Range Waiver

1. Open a Range Customer's Party Control Window (see page 57).

2. Complete one of the following procedures as appropriate to verify the completion of the customer's range waiver:

Confirm Completion of a Paper Waiver

1. Have the customer read and sign a paper range waiver.

   Note: If the customer has previously completed the form, retrieve it for verification purposes.

2. Review the paper range waiver and verify it has been correctly completed.
3. Click the **P (Paper Waiver)** button to change it to green (filled).
4. Continue with the procedure below.

Complete an Electronic Waiver

1. Click the **E (Electronic Waiver)** button to display the **Range Waiver** window.

2. Have the customer read the waiver and sign where indicated.

   Note: If needed, click the **Clear** button to remove signature marks and start over.

3. Click the **Email Receipt to Customer** checkbox to display a check if a waiver is to be sent to the customer.
4. Click the **Save** button to display a green (filled) **E (Electronic Waiver)** button in the **Party Control** window.

   Note: The completed waiver document (PDF) may display in its own window. Save and print it as desired.

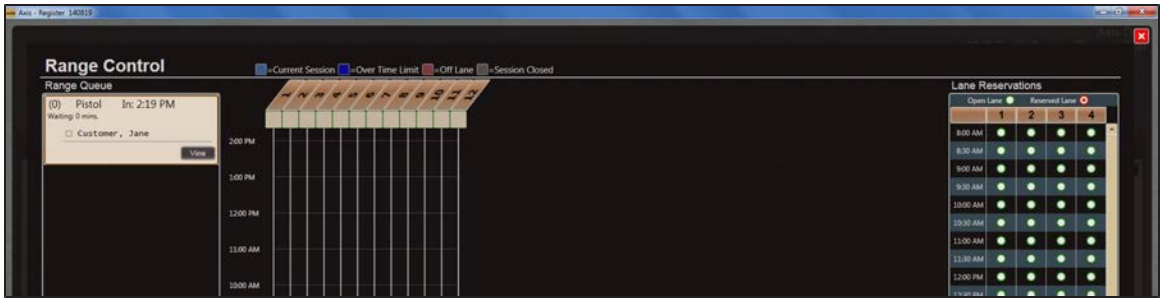
5. Continue with the procedure below.

3. Click the **OK** button to close the **Party Control** window.

   Note: The box to the left of the customer's name is now green (filled).

Turn a Range Lane On or Off

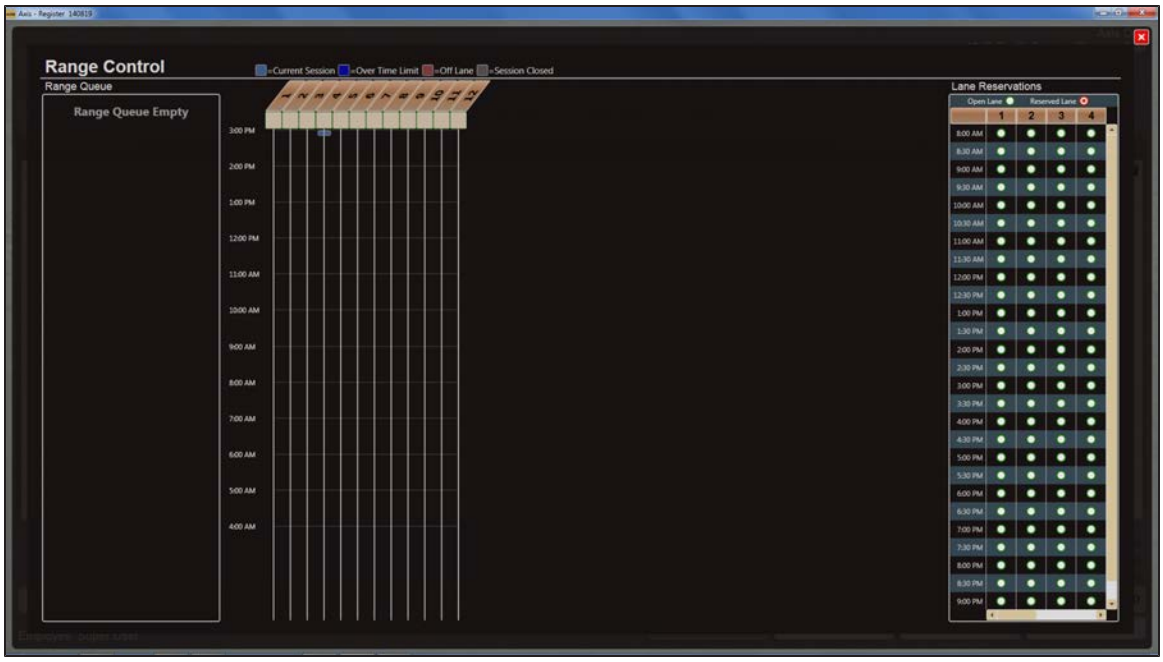
1. Click the **Range** tab to display the **Range Control** window.



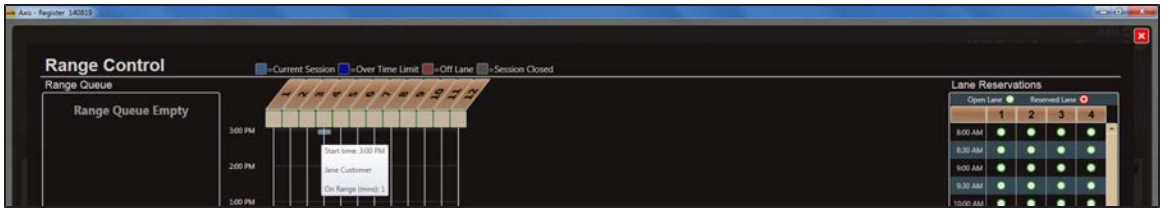
2. Click the **Lane Name/Number** to clear or fill the **Assign Lane** box beneath it.
   - An empty box indicates the lane is on.
   - A red (filled) box indicates the lane is off.

Assign a Range Customer to a Lane

1. Add a Range Customer to the Range Queue (see page 56).
2. Click the customer's range queue box to select it.
3. Click the **Assign Lane** box beneath the **Lane Name/Number** to display the customer's marker on the timeline.



4. Hover over the marker to display lane use details (start time, the names of shooters in the party, and total time on the lane).



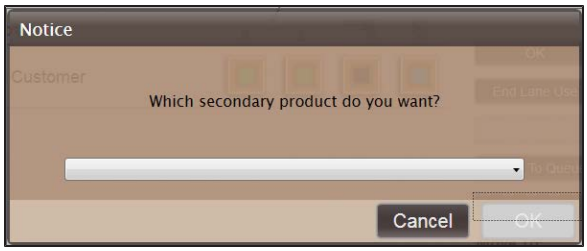
5. Determine the session status by observing the marker's color:
   - Light blue indicates the session is currently within its prearranged limits.
   - Dark blue indicates the session has exceed the time limit.
   - Red indicates the customer has moved off the lane.
   - Gray indicates the session has ended.

Add a Secondary Shooter to a Range Customer's Party

Note: This procedure is available only if the range customer has already been assigned a lane.

1. Open a Range Customer's Party Control Window (see page 57).

2. Click the **Add Shooter** button to display the **Notice** window.

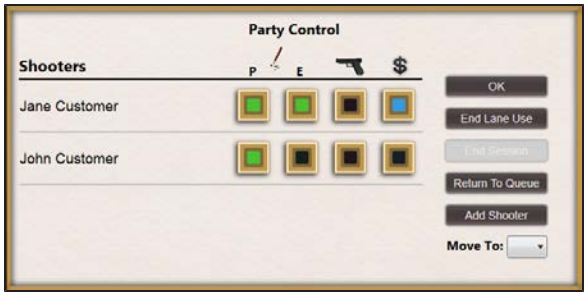


3. Select a secondary product from the drop-down menu.

   Note: Refer to Add an Item to a Transaction (see page 19) for information on using product entry and search controls.

4. Click the **OK** button to close the **Notice** window and display the **Customer** window.
5. Identify the secondary shooter to display him/her in the customer's **Party Control** window.

   Note: Refer to Identify the Customer (see page 17) for information on adding/selecting a new or existing party to be a secondary shooter.



6. Click the **OK** button to close the **Party Control** window.

   Note: If the **OK** button is grayed out, the new shooter does not have a signed range waiver on file and may not yet be assigned to the lane. Have the shooter complete a paper or electronic waiver before proceeding. Refer to Verify a Customer's Range Waiver (see page 58) for more information.

Move a Range Customer to a Different Lane

Note: This procedure is available only if the range customer has already been assigned a lane.

1. Open a Range Customer's Party Control Window (see page 57).

2. Select the new lane from the **Move To** drop-down menu.
3. Click the **OK** button to close the **Party Control** screen and move the party's marker to the selected lane.

Rent a Firearm to a Range Customer

1. Open a Range Customer's Party Control Window (see page 57).

2. Click the customer's **Rental Firearm** button to display the **Range Guns** list.

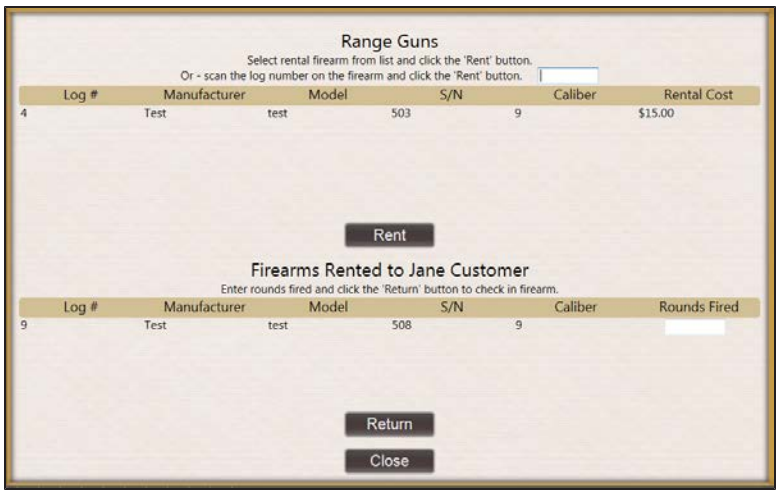
3. Click the rental firearm in the list (or scan a firearm's log number) to select it.
4. Click the **Rent** button to add the firearm to the customer's **Firearms Rented to** list.

5. Click the **Close** button to display a filled **Rental Firearm** button in the **Party Control** window.
6. Click the **OK** button to close the **Party Control** window.

Retrieve a Rental Firearm from a Range Customer

1. Open a Range Customer's Party Control Window (see page 57).

2. Click the customer's pink **Rental Firearm** button to display the customer's **Firearms Rented to** list.



3. Select the firearm.
4. Enter the number of rounds fired in the firearm's **Rounds Fired** field.
5. Click the **Return** button to move the firearm back to the **Range Guns** list.

6. Click the **Close** button to display the **Party Control** window.
7. Click the **OK** button to close the **Party Control** window.

End a Range Customer’s Lane Time

Note: This procedure is available only if the range customer has already been assigned a lane.

1. Open a Range Customer's Party Control Window (see page 57).

2. Click the **End Lane Use** button to change the customer’s marker to red.

Complete a Range Customer's Transaction

1. Open a Range Customer's Party Control Window (see page 57).

2. Click the customer's blue **Transaction** button to display the **Cash Register** screen.

3. Complete the transaction.
4. If desired, reopen the customer's **Party Control** window and verify that the **Transaction** button has turned black (empty).

End a Range Customer’s Range Session

Note: This procedure is available only if the range customer has already been assigned a lane and the session transaction has been completed.

1. Open a Range Customer's Party Control Window (see page 57).

2. Click the **End Session** button to remove the customer's marker from the timeline.

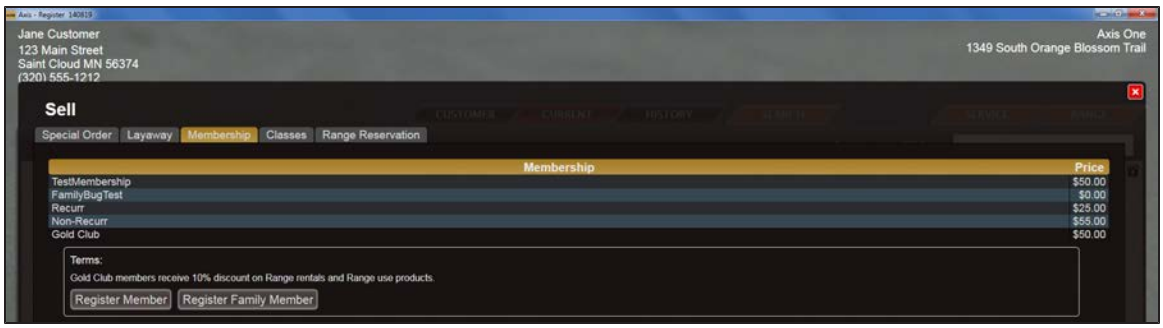
   Note: If the **End Session** button is grayed out, the session transaction has not been completed (paid for) and may not be ended at this time. Refer to Complete a Range Customer’s Transaction (see page 66) for more information.

Memberships

- Register a Member for a Membership (see page 70)
- Register a Group/Family Member for a Membership (see page 72)
- View a Customer's Active Memberships (see page 71)

Register a Member for a Membership

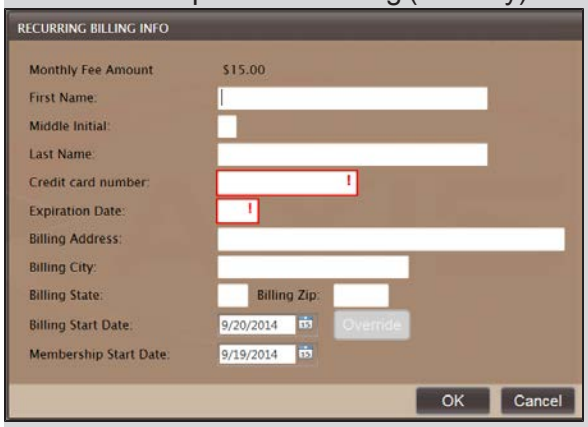
1. Identify the Customer (see page 17).
2. Click the **Sell** tab to display the **Sell** window.
3. Click the **Membership** tab to display the **Membership** page.
4. Click the desired membership to display its **Terms** record.



5. Click the **Register Member** button to display the **Customer** window.
6. Identify the member to add the membership to the transaction on the **Cash Register** screen.

Note: Refer to Identify the Customer (see page 17) for information on adding/selecting a new or existing party to be a member.

Note: If the system displays a **Recurring Billing Info** window in front of the **Cash Register** screen, the membership has a recurring (monthly) fee that must be billed to a valid credit card.



Complete the fields and click the **OK** button to close the window.

7. Complete the transaction.

View a Customer's Active Memberships

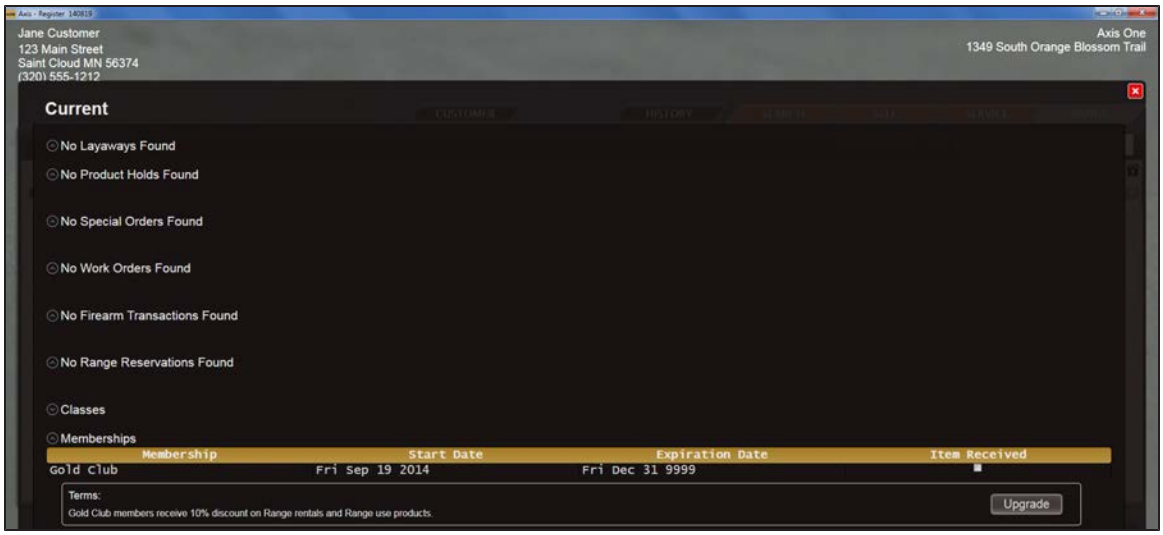
1. Identify the Customer (see page 17).

   Note: Be sure to select the party that is registered as a member, not necessarily the party that purchased the membership.

2. Click the **Current** tab to display the **Current** window.

   Note: If necessary, click the expand button beside the **Memberships** heading to display the customer's current memberships.

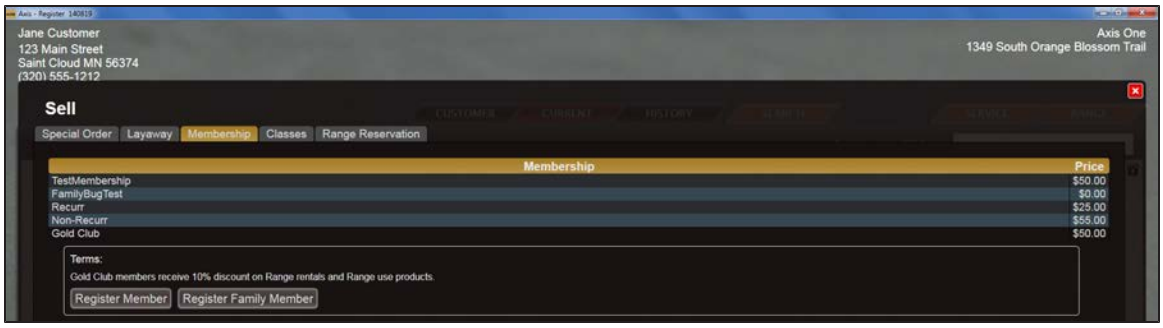
3. Click the membership to display details.



4. When finished, click the **Close** button to close the **Current** window.

Register a Group/Family Member for a Membership

1. Identify the Customer (see page 17).
2. Click the **Sell** tab to display the **Sell** window.
3. Click the **Membership** tab to display the **Membership** page.
2. Click the desired membership to display its **Terms** record.



4. Click the **Register Family Member** button to display the **Customer** window.

   Note: If this button does not display, this membership does not offer a group membership option.

5. Select the primary member to display another **Customer** window.
6. Identify the group/family member to display a confirmation window.

   Note: Refer to Identify the Customer (see page 17) for information on adding/selecting a new or existing party to be a group/family member.

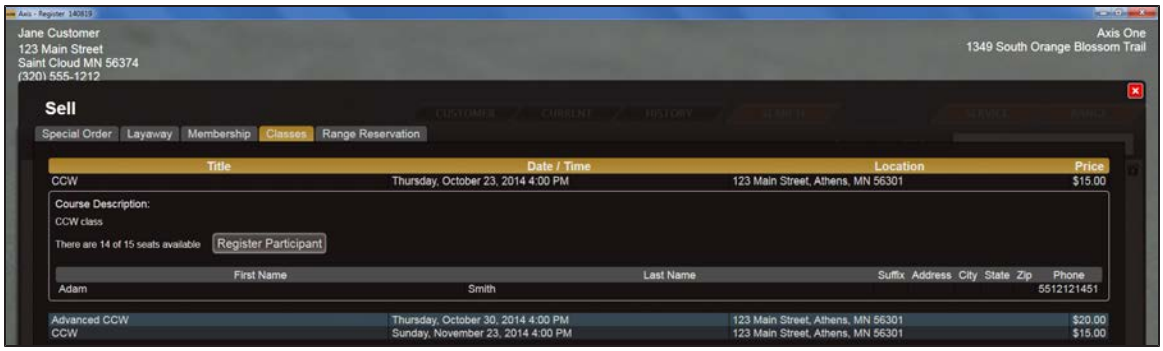
7. Click the **OK** button.
8. Click the **Close** button to close the **Sell** window.

Classes

- Register a Class Participant (see page 74)
- Relocate a Participant to Another Class (see page 76)
- View a Customer's Upcoming Classes (see page 75)

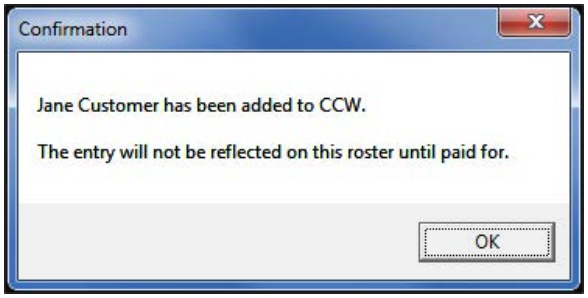
Register a Class Participant

1. Identify the Customer (see page 17).
2. Click the **Sell** tab to display the **Sell** window.
3. Click the **Classes** tab to display a list of available classes on the **Classes** page.
4. Click the desired class to display its **Course Description** record showing the number of available openings and the names of registered participants.



5. Click the **Register Participant** button to display the **Customer** window.
6. Identify the participant to display the **Confirmation** window.

Note: Refer to Identify the Customer (see page 17) for information on adding/selecting a new or existing party to be a participant.



7. Click the **OK** button to close the window.

Note: The participant will not display in the list of registered participants until the transaction has been completed.

8. Click the **Close** button to close the **Sell** window and add the class to the transaction on the **Cash Register** screen.

9. Complete the transaction.

View a Customer's Upcoming Classes

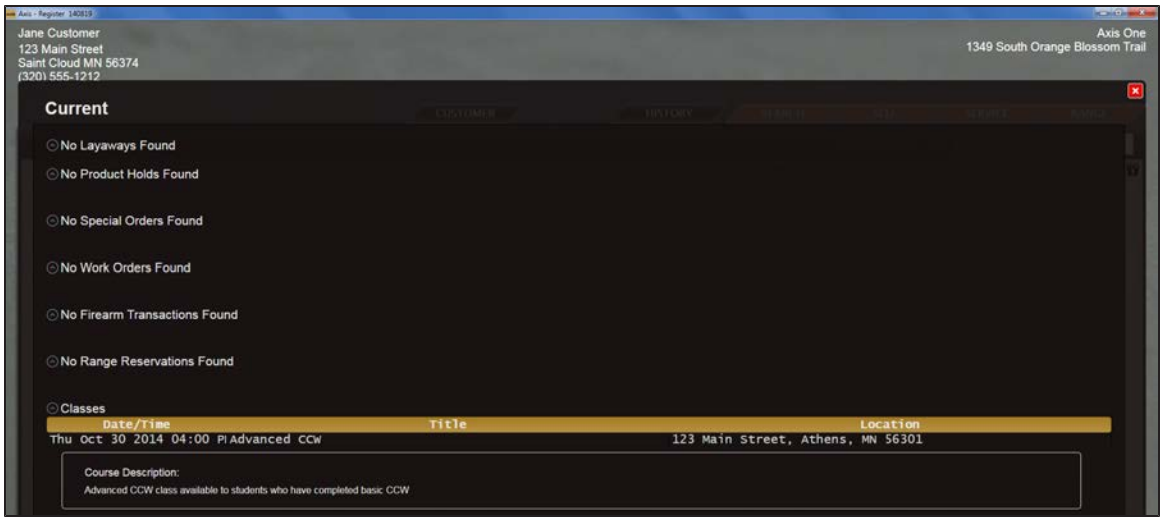
1. Identify the Customer (see page 17).

   Note: Be sure to select the party that is registered for the class, not necessarily the party that purchased the registration.

2. Click the **Current** tab to display the **Current** window.

   Note: If necessary, click the expand button beside the **Classes** heading to display the customer's upcoming classes.

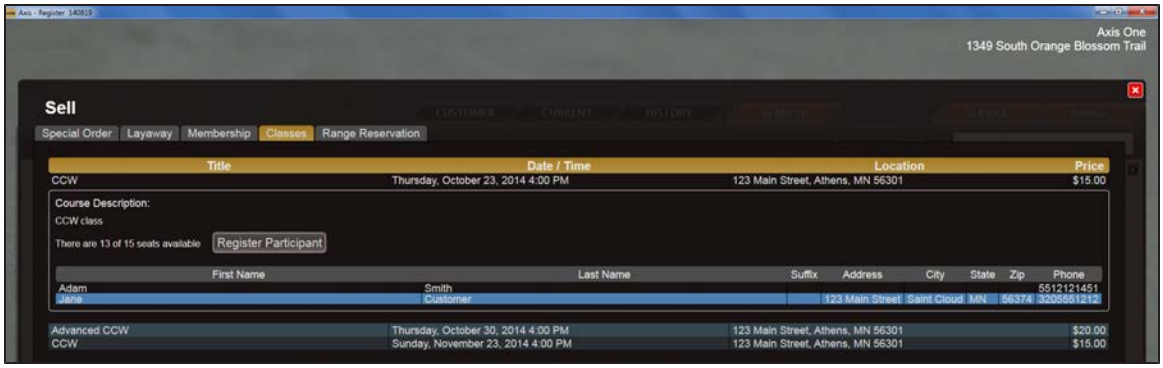
3. Click the class to display details.



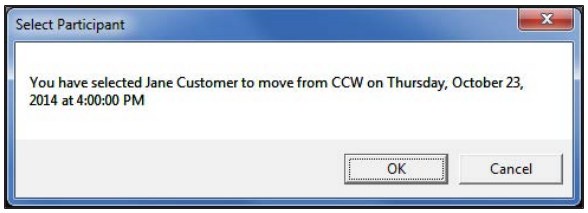
4. When finished, click the **Close** button to close the **Current** window.

Relocate a Participant to Another Class

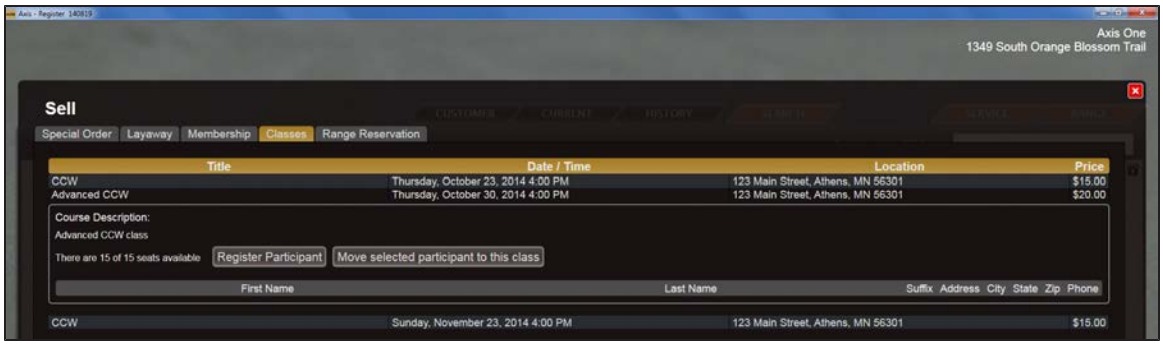
1. Click the **Sell** tab to display the **Sell** window.
2. Click the **Classes** tab to display a list of available classes on the **Classes** page.
3. Click the desired class to display its **Course Description** record showing the number of available openings and the names of registered participants.



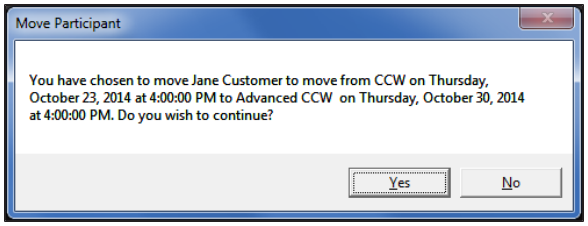
4. Right-click the customer's name in the list to display the **Select Participant** window.



5. Click the **OK** button to close the window.
6. Click the class in which the customer is to be enrolled to display its **Course Description** record.



7. Click the **Move selected participant to this class** button to display the **Move Participant** window.



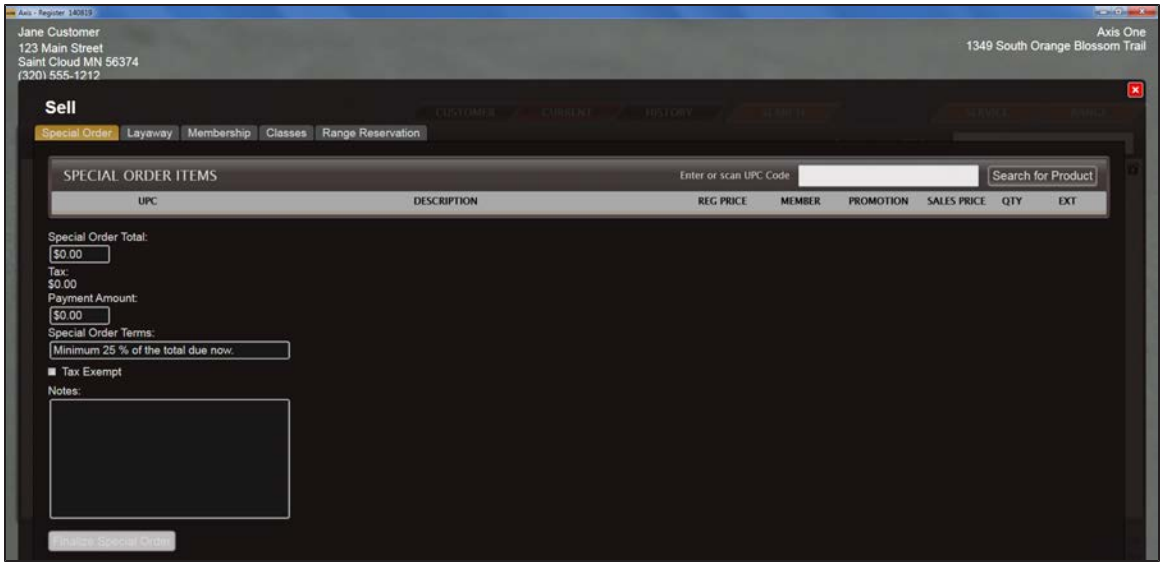
8. Click the **Yes** button.

Special Orders

- Place a Special Order (see page 78)
- View a Customer's Active Special Orders (see page 80)
- Receive a Payment on a Special Order (see page 81)
- Finalize a Special Order (see page 83)
- Cancel a Special Order (see page 84)
- View a Customer's Special Order History (see page 85)

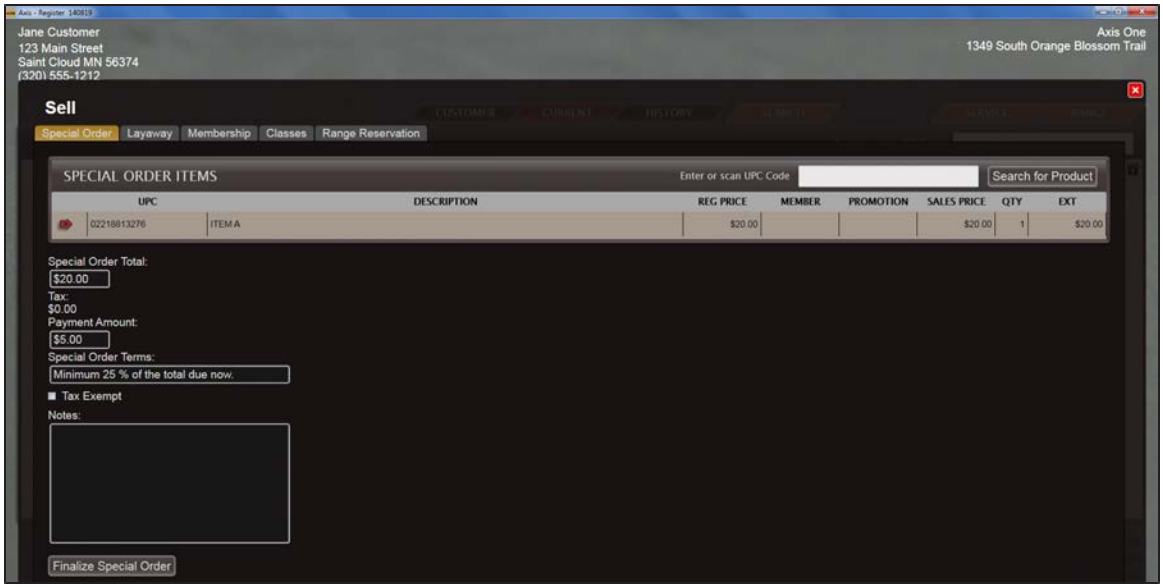
Place a Special Order

1. Identify the Customer (see page 17).
2. Click the **Sell** tab to display the **Sell** window.
3. Click the **Special Order** tab to display the **Special Order** page.



4. Select the desired product to display it in the **Special Order Items** list.
   - Scan or enter the product's UPC in the **Enter or Scan UPC Code** field and press the **Enter** key.
   - Click the **Search for Product** button and search for and select the desired product.

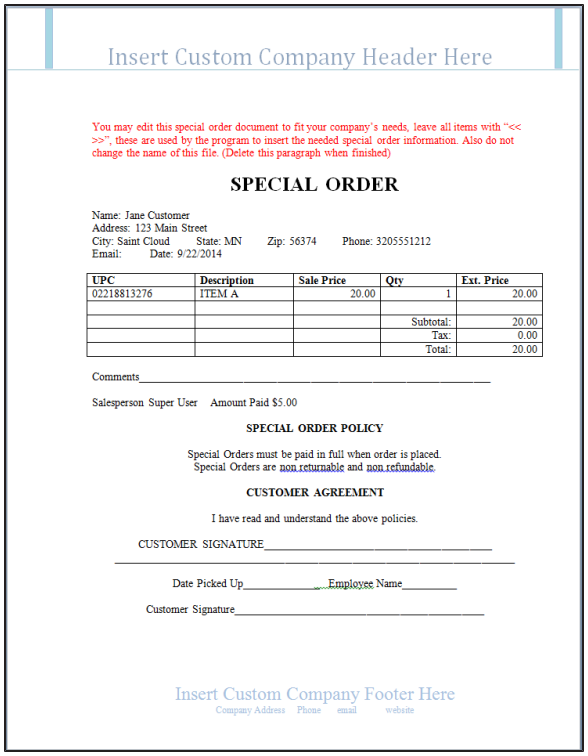
Note: Refer to Add an Item to a Transaction (see page 19) for information on using product entry and search controls.



5. Edit fields as needed:

- Modify the automatically calculated amount in the **Payment Amount** field.
- Enter/edit terms in the **Special Order Terms** field.
- If the transaction is tax exempt, click the **Tax Exempt** checkbox to display a check.
- Enter explanatory notes in the **Notes** field.

6. Click the **Finalize Special Order** button to add the item to the customer's **Special Orders** list on the **Current** window, add the deposit amount to the **Cash Register** screen, and display the special order document.



Insert Custom Company Header Here

You may edit this special order document to fit your company's needs, leave all items with "<< >>", these are used by the program to insert the needed special order information. Also do not change the name of this file. (Delete this paragraph when finished)

SPECIAL ORDER

Name: Jane Customer
Address: 123 Main Street
City: Saint Cloud State: MN Zip: 56374 Phone: 3205551212
Email: Date: 9/22/2014

UPC	Description	Sale Price	Qty	Ext. Price
02218813276	ITEM A	20.00	1	20.00
			Subtotal:	20.00
			Tax:	0.00
			Total:	20.00

Comments_____

Salesperson Super User Amount Paid $5.00

SPECIAL ORDER POLICY

Special Orders must be paid in full when order is placed.
Special Orders are non returnable and non refundable.

CUSTOMER AGREEMENT

I have read and understand the above policies.

CUSTOMER SIGNATURE_____

Date Picked Up_____ Employee Name_____

Customer Signature_____

Insert Custom Company Footer Here
Company Address Phone email website

7. Save and print the document as desired to create electronic and hardcopy records of the special order. Close the document to return to the **Cash Register** screen.

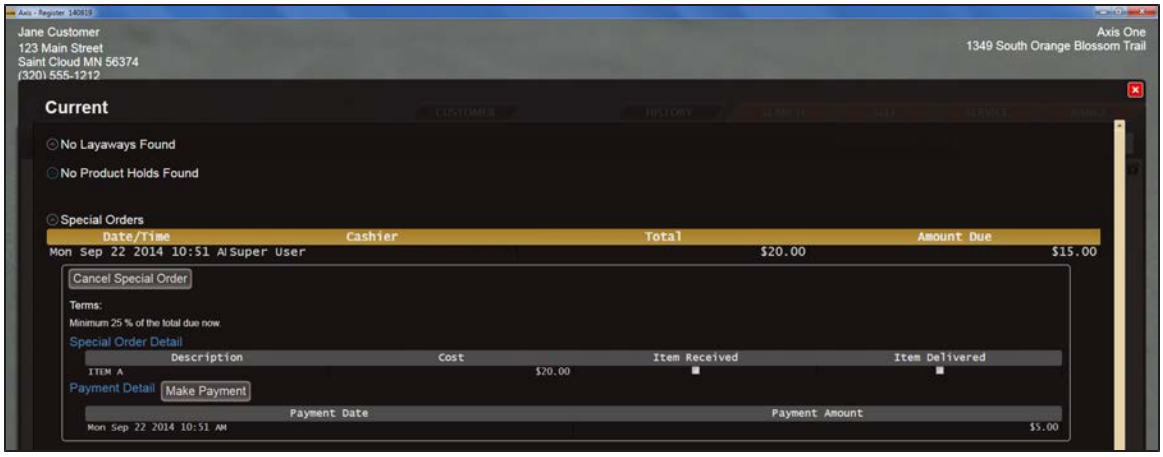
8. Complete the transaction.

View a Customer's Active Special Orders

1. Identify the Customer (see page 17).
2. Click the **Current** tab to display the **Current** window.

   Note: If necessary, click the expand button beside the **Special Orders** heading to display the customer's special order items.

3. Click the special order to display details.



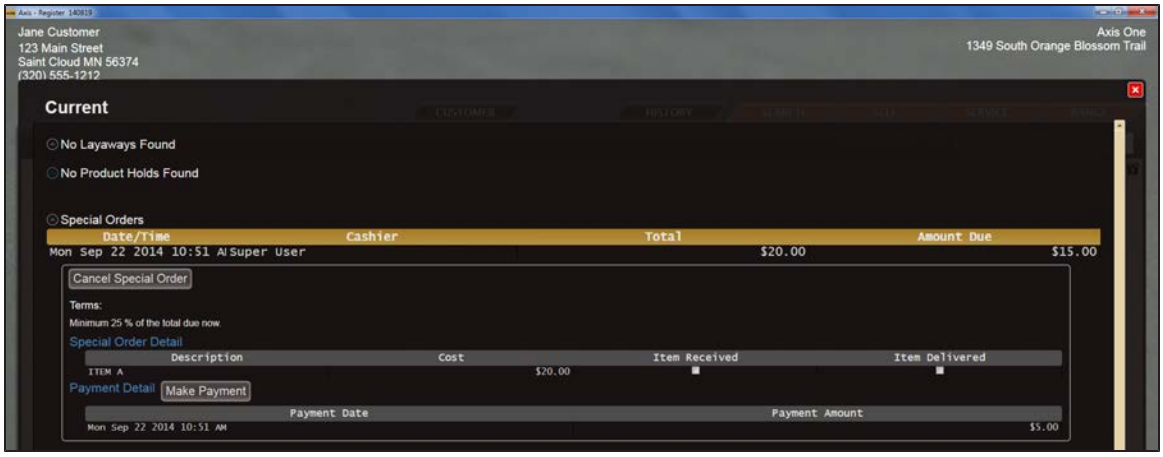
4. Note the status of these onscreen controls:
   - If the **Finalize** button is present, the special order item has been received into the store and the customer has paid the full amount due. Refer to Finalize a Special Order (see page 83) for more information.
   - If the **Make Payment** button is active (not grayed out), the customer has not yet paid the full amount of the special order. Refer to Receive a Payment on a Special Order (see page 81) for more information.
   - If the **Item Received** checkbox is not checked, the special order item has not yet been received into the store. The special order cannot be finalized at this time, but payments may be received (if applicable).
5. When finished, click the **Close** button to close the **Current** window.

Receive a Payment on a Special Order

1. Identify the Customer (see page 17).
2. Click the **Current** tab to display the **Current** window.

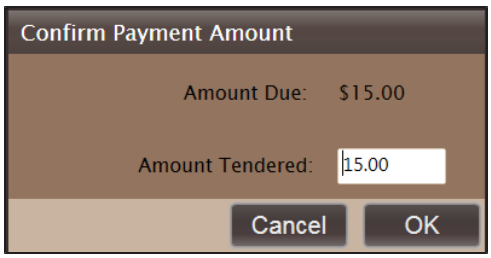
   Note: If necessary, click the expand button beside the **Special Orders** heading to display the customer's special order items.

3. Click the special order to display details.



4. Note the status of the **Item Received** checkbox:
   - If the box is checked, the special order item has been received into the store and can be delivered to the customer when the total amount due is paid.
   - If the box is not checked, the special order item has not yet been received into the store. If the customer pays the total amount due before the product is received, the special order will need to be manually finalized when the product is received into the store. Refer to Finalize a Special Order (see page 83) for more information.
5. Click the **Make Payment** button to display the **Confirm Payment Amount** window.

   Note: If this button is grayed out, no payments are required for this special order at this time.



6. Adjust the amount in the **Amount Tendered** field as needed.
7. Click the **OK** button to add the payment amount to the **Cash Register** screen and close the **Current** window.

8. Complete the transaction.

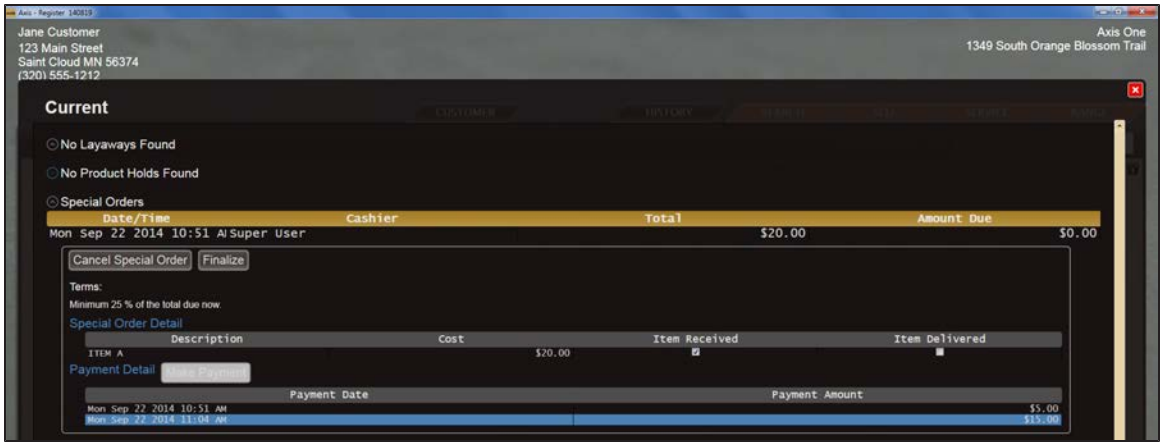
Note: If the special order item was previously received, this procedure automatically finalizes the special order (marks it completed and delivered) and moves it to the customer's **Special Orders** list on the **History** window.
If the special order item was not previously received, the special order must be manually finalized following the receipt of the item. Refer to Finalize a Special Order (see page 83) for more information.

Finalize a Special Order

1. Identify the Customer (see page 17).
2. Click the **Current** tab to display the **Current** window.

   Note: If necessary, click the expand button beside the **Special Orders** heading to display the customer's special order items.

3. Click the special order to display details.



4. Click the **Finalize** button to display the finalization **Notice** window.

   Note: If this button is not present, the special order may not be manually finalized at this time, either because the amount due has not been paid or the item has not been received.

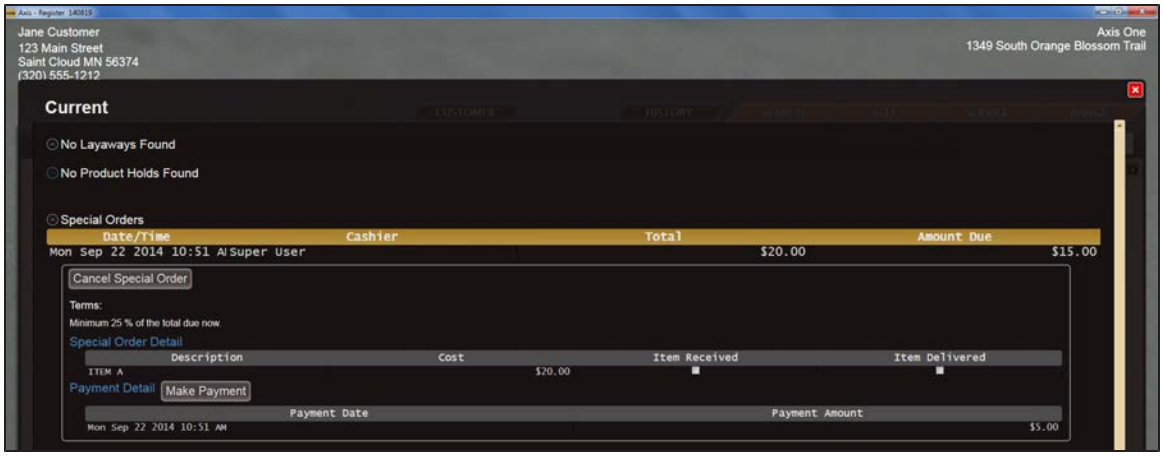
5. Click the **OK** button to move the special order to the customer's **Special Orders** list on the **History** window and display a blank **Cash Register** screen.

Cancel a Special Order

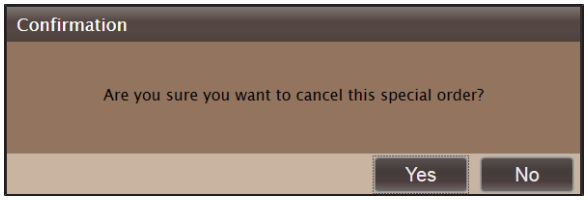
1. Identify the Customer (see page 17).
2. Click the **Current** tab to display the **Current** window.

   Note: If necessary, click the expand button beside the **Special Orders** heading to display the customer's special order items.

3. Click the special order to display details.



4. Click the **Cancel Special Order** button to display the **Confirmation** window.

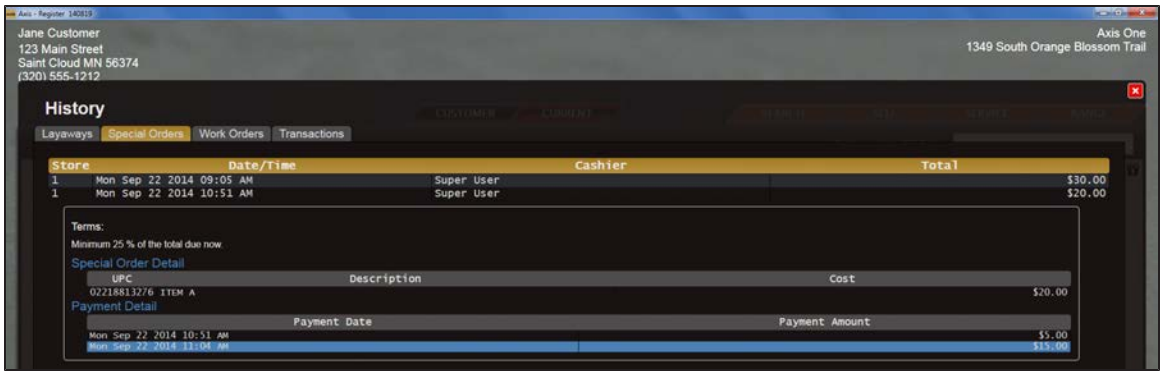


5. Click the **Yes** button to add associated items (refund amount, restocking fee, etc.) to the **Cash Register** screen and close the **Current** window.

6. Complete the transaction.

View a Customer's Special Order History

1. Identify the Customer (see page 17).
2. Click the **History** tab to display the **History** window.
3. Click the **Special Orders** tab to display the **Special Orders** page.
4. Click a special order to display its **Special Order Detail** and **Payment Detail** record.



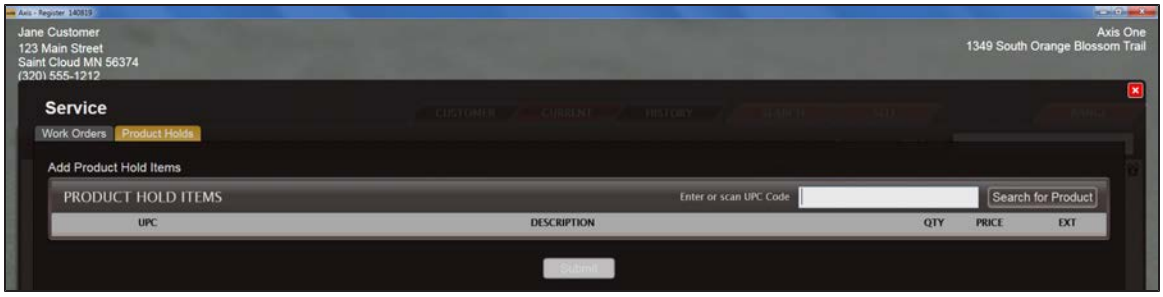
5. When finished, click the **Close** button to close the **History** window.

Product Holds

- Place a Hold on a Product (see page 88)
- Sell a Held Product (see page 90)
- Cancel a Product Hold (see page 91)
- View a Customer's Active Product Holds (see page 89)

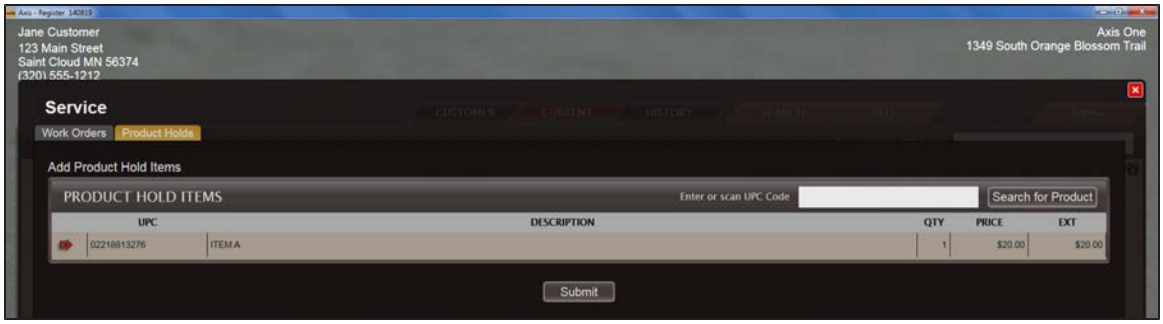
Place a Hold on a Product

1. Identify the Customer (see page 17).
2. Click the **Service** tab to display the **Service** window.
3. Click the **Product Holds** tab to display the **Product Holds** page.

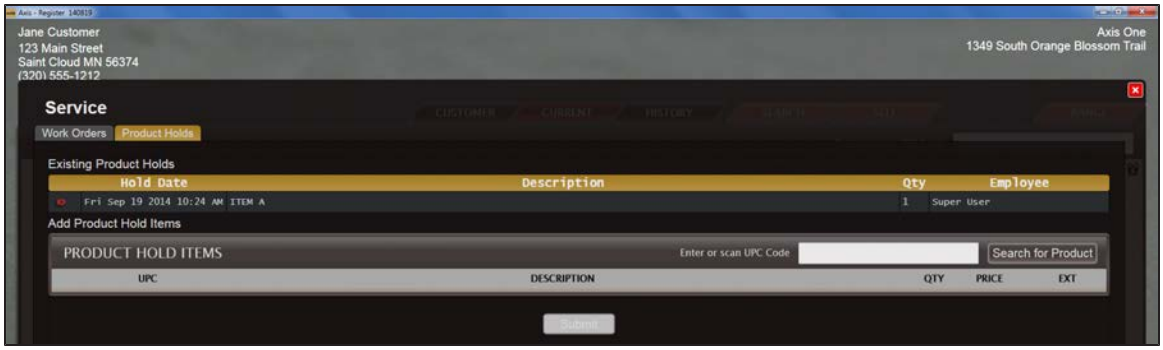


4. Select the desired product to display it in the **Product Hold Items** list.
   - Scan or enter the product's UPC in the **Enter or Scan UPC Code** field and press the **Enter** key.
   - Click the **Search for Product** button and search for and select the desired product.

Note: Refer to Add an Item to a Transaction (see page 19) for information on using product entry and search controls.



5. Click the **Submit** button to move the selected item(s) from the **Product Hold Items** list to the **Existing Product Holds** list.

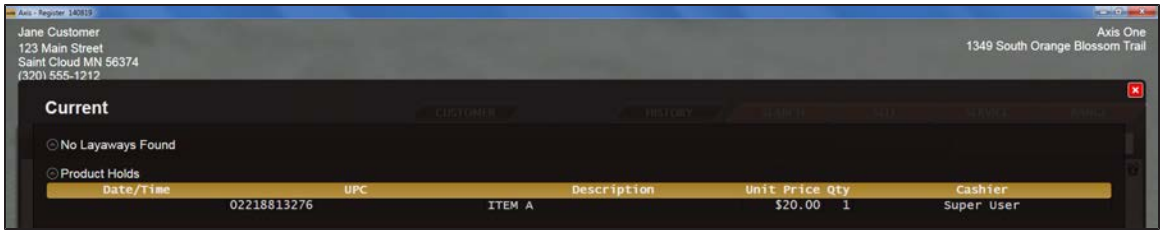


6. Click the **Close** button to close the **Service** window.

View a Customer's Active Product Holds

1. Identify the Customer (see page 17).
2. Click the **Current** tab to display the **Current** window.

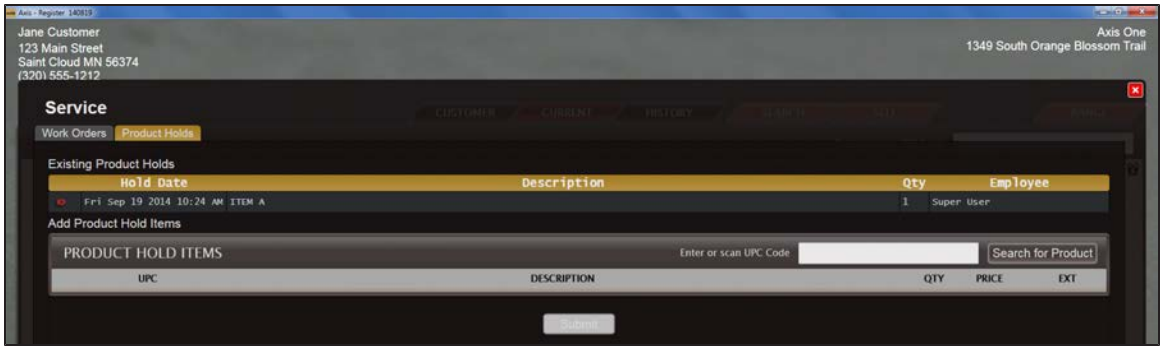
   Note: If necessary, click the expand button beside the **Product Holds** heading to display the customer's product holds.



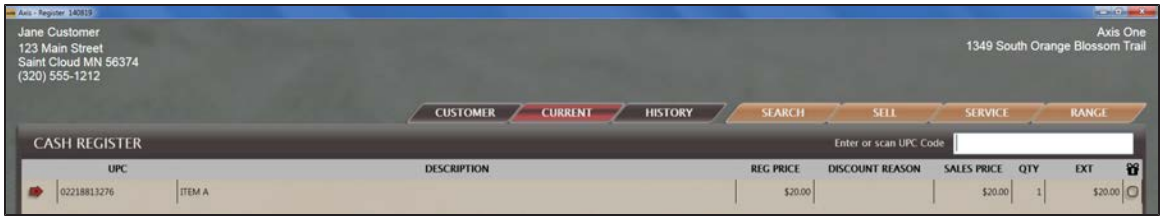
3. When finished, click the **Close** button to close the **Current** window.

Sell a Held Product

1. Identify the Customer (see page 17).
2. Click the **Service** tab to display the **Service** window.
3. Click the **Product Holds** tab to display the **Product Holds** page.



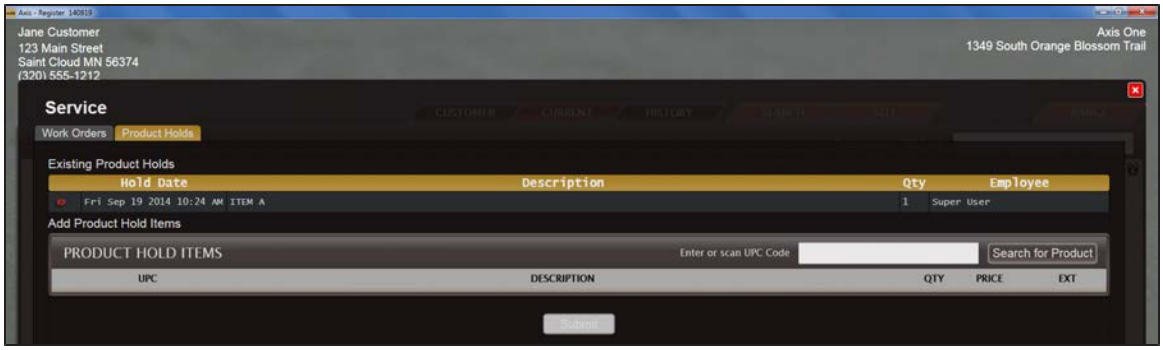
4. Double-click an item in the **Existing Product Holds** list to add it to the **Cash Register** screen and close the **Service** window.



5. Complete the transaction.

Cancel a Product Hold

1. Identify the Customer (see page 17).
2. Click the **Service** tab to display the **Service** window.
3. Click the **Product Holds** tab to display the **Product Holds** page.



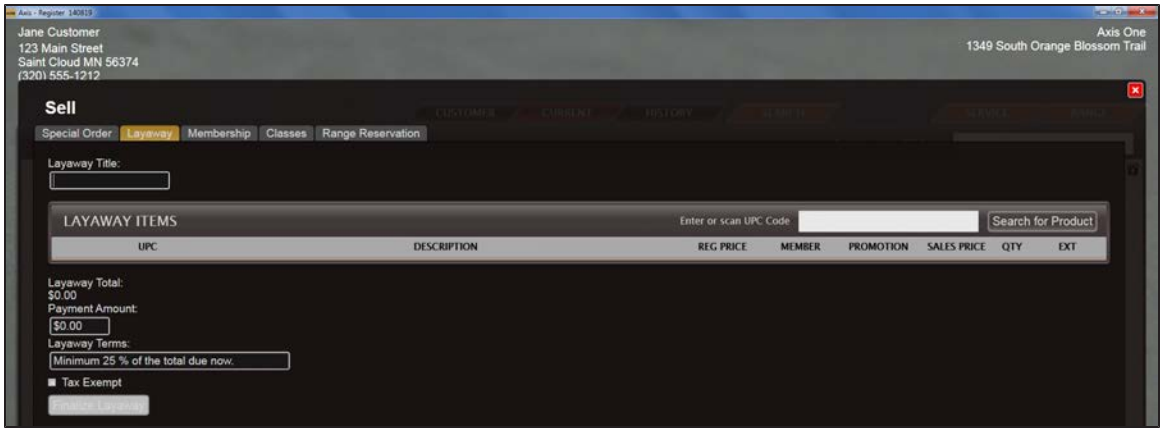
4. Click the **Delete** (red X) button to the left of an item in the **Existing Product Holds** list to remove it from the window.
5. Click the **Close** button to close the **Service** window.

Layaways

- Place a Product on Layaway (see page 94)
- View a Customer's Active Layaways (see page 96)
- Receive a Payment on a Layaway (see page 97)
- Cancel a Layaway (see page 98)
- View a Customer's Layaway History (see page 99)
- Process a Return from a Customer's Layaway History (see page 100)

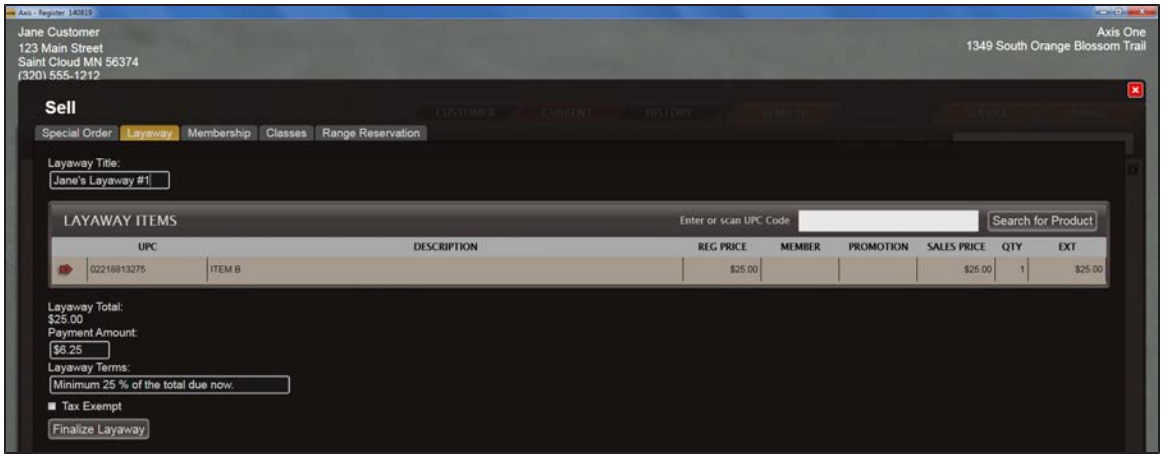
Place a Product on Layaway

1. Identify the Customer (see page 17).
2. Click the **Sell** tab to display the **Sell** window.
3. Click the **Layaway** tab to display the **Layaway** page.

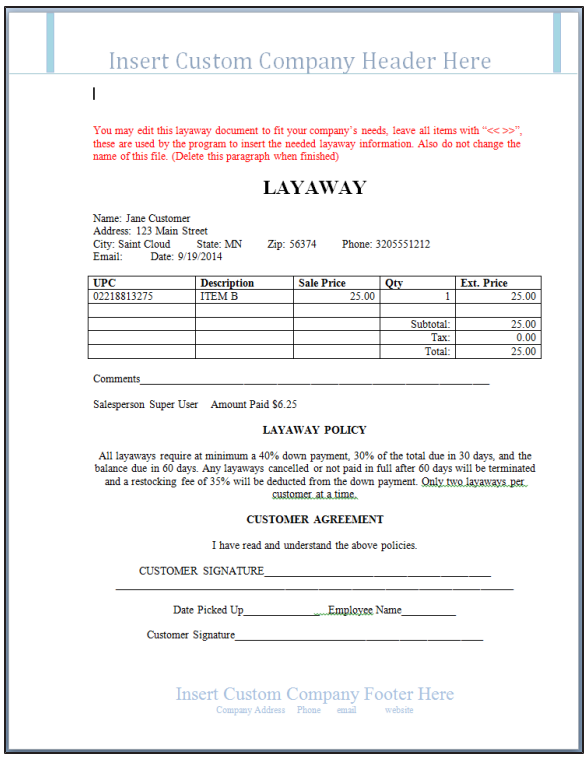


4. Enter a descriptive title in the **Layaway Title** field.
5. Select the desired product to display it in the **Layaway Items** list.
   - Scan or enter the product's UPC in the **Enter or Scan UPC Code** field and press the **Enter** key.
   - Click the **Search for Product** button and search for and select the desired product.

Note: Refer to Add an Item to a Transaction (see page 19) for information on using product entry and search controls.



6. Edit fields as needed:
   - Modify the automatically calculated amount in the **Payment Amount** field.
   - Enter/edit terms in the **Layaway Terms** field.
   - If the transaction is tax exempt, click the **Tax Exempt** checkbox to display a check.
   - Enter explanatory notes in the **Notes** field.
7. Click the **Finalize Layaway** button to add the item to the customer's **Layaways** list on the **Current** window, add the initial payment amount to the **Cash Register** screen, and display the layaway document.



Insert Custom Company Header Here

You may edit this layaway document to fit your company's needs, leave all items with "<< >>", these are used by the program to insert the needed layaway information. Also do not change the name of this file. (Delete this paragraph when finished)

LAYAWAY

Name: Jane Customer
Address: 123 Main Street
City: Saint Cloud State: MN Zip: 56374 Phone: 3205551212
Email: Date: 9/19/2014

UPC	Description	Sale Price	Qty	Ext. Price
02218813275	ITEM B	25.00	1	25.00
			Subtotal:	25.00
			Tax:	0.00
			Total:	25.00

Comments_____

Salesperson Super User Amount Paid $6.25

LAYAWAY POLICY

All layaways require at minimum a 40% down payment, 30% of the total due in 30 days, and the balance due in 60 days. Any layaways cancelled or not paid in full after 60 days will be terminated and a restocking fee of 35% will be deducted from the down payment. Only two layaways per customer at a time.

CUSTOMER AGREEMENT

I have read and understand the above policies.

CUSTOMER SIGNATURE_____

_____

Date Picked Up_____ Employee Name_____

Customer Signature_____

Insert Custom Company Footer Here
Company Address Phone email website

8. Save and print the document as desired to create electronic and hardcopy records of the layaway. Close the document to return to the **Cash Register** screen.

9. Complete the transaction.

View a Customer's Active Layaways

1. Identify the Customer (see page 17).
2. Click the **Current** tab to display the **Current** window.

   Note: If necessary, click the expand button beside the **Layaways** heading to display the customer's layaways.

3. Click the layaway to display details.

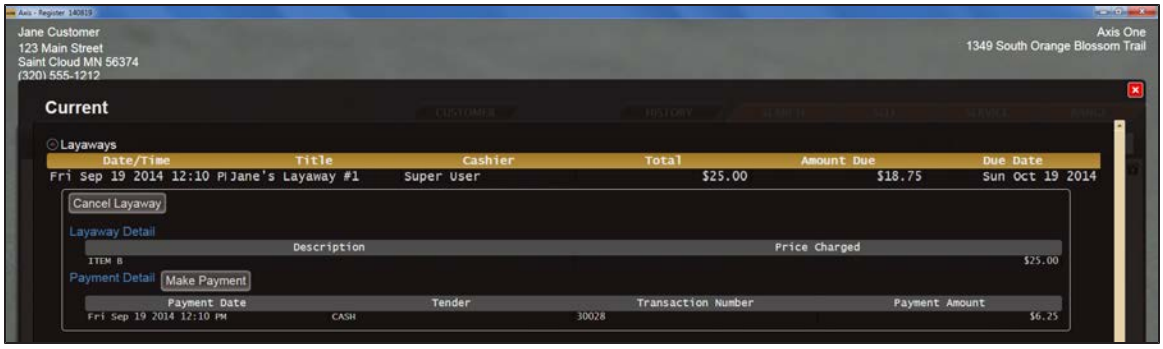
4. When finished, click the **Close** button to close the **Current** window.

Receive a Payment on a Layaway

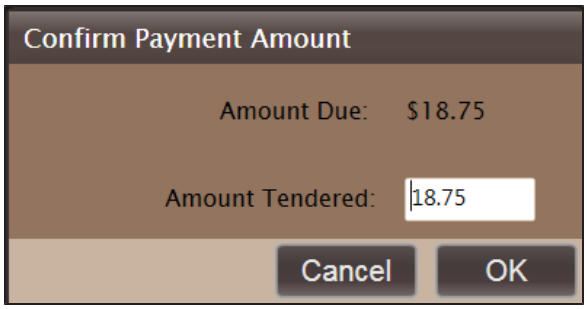
1. Identify the Customer (see page 17).
2. Click the **Current** tab to display the **Current** window.

   Note: If necessary, click the expand button beside the **Layaways** heading as needed to display the customer's layaway items.

3. Click the layaway to display details.



4. Click the **Make Payment** button to display the **Confirm Payment Amount** window.



5. Enter/edit the desired payment amount in the **Amount Tendered** field.
6. Click the **OK** button to add the payment amount to the **Cash Register** screen and close the **Current** window.

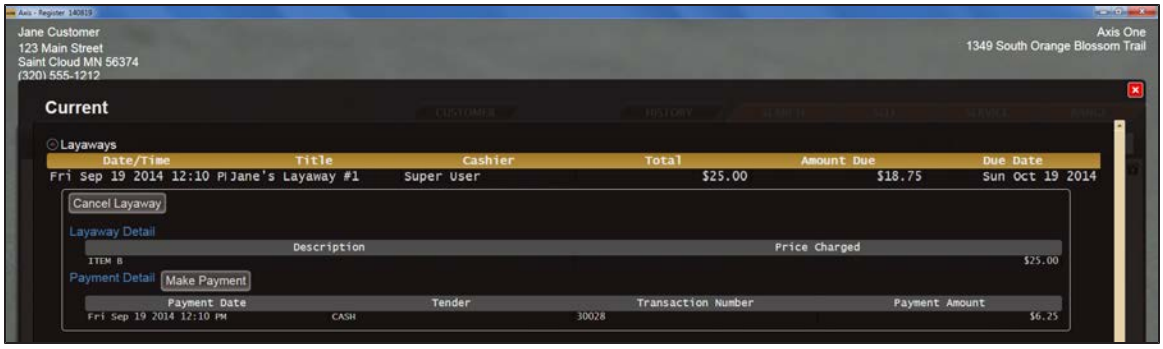
7. Complete the transaction.

Cancel a Layaway

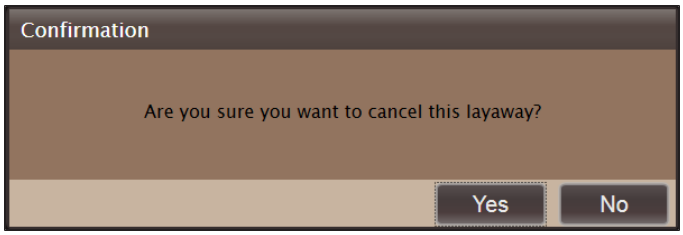
1. Identify the Customer (see page 17).
2. Click the **Current** tab to display the **Current** window.

   Note: If necessary, click the expand button beside the **Layaways** heading as needed to display the customer's layaway items.

3. Click the layaway to display details.



4. Click the **Cancel Layaway** button to display the **Confirmation** window.



5. Click the **Yes** button to add associated items (refund amount, restocking fee, etc.) to the **Cash Register** screen and close the **Current** window.

6. Complete the transaction.

View a Customer's Layaway History

1. Identify the Customer (see page 17).
2. Click the **History** tab to display the **History** window.
3. Click the **Layaways** tab to display the **Layaways** page.
4. Click a layaway to display its **Layaway Detail** and **Payment Detail** record.

5. When finished, click the **Close** button to close the **History** window.

Process a Return from a Customer's Layaway History

1. Identify the Customer (see page 17).
2. Click the **History** tab to display the **History** window.
3. Click the **Layaways** tab to display the **Layaways** page.
4. Click a layaway to display its **Layaway Detail** and **Payment Detail** record.

5. Note the **Return Available** checkbox for the item to be returned:
   - If the box is not checked (empty), the item may not be returned.
   - If the box is checked (filled), the item may be returned. Proceed to the next step.
6. Double-click the item to add the return to the **Cash Register** screen and close the **History** window.

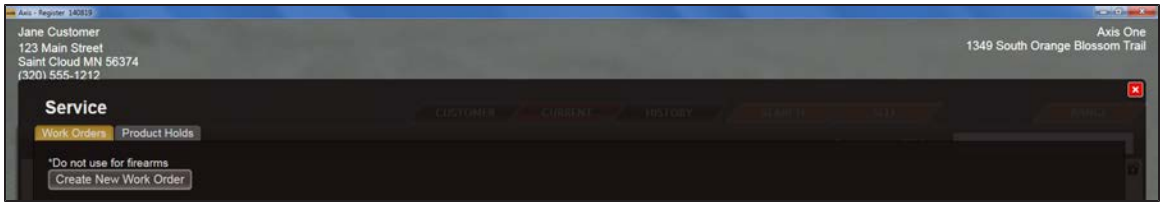
7. Complete the transaction.

Work Orders

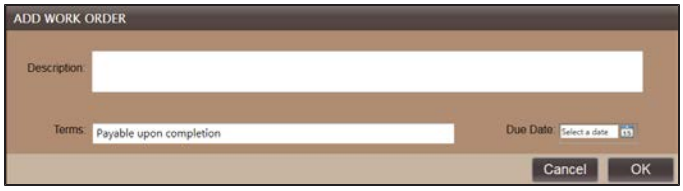
- Create a Work Order (see page 102)
- View a Customer's Active Work Orders (see page 103)
- Add a Detail to an Open Work Order (see page 104)
- Close a Completed Work Order (see page 105)
- View a Customer's Completed Work Orders (see page 106)
- Receive Payment for a Completed Work Order (see page 107)
- View a Customer's Work Order History (see page 108)

Create a Work Order

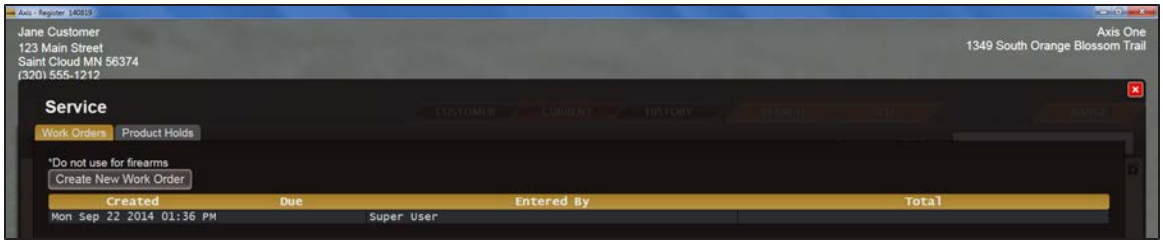
1. Identify the Customer (see page 17).
2. Click the **Service** tab to display the **Service** window.
3. Click the **Work Orders** tab to display the **Work Orders** page.



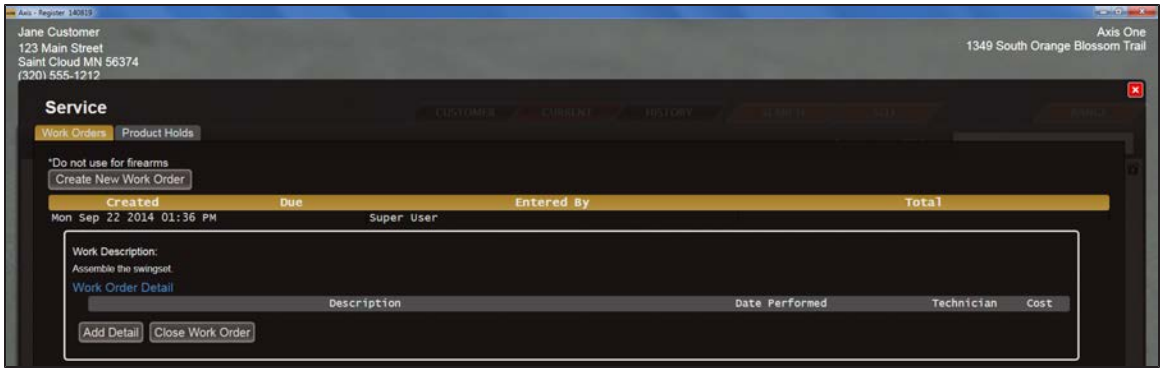
4. Click the **Create New Work Order** button to display the **Add Work Order** window.



5. Complete the required fields:
   - Enter a description of the work to be performed in the **Description** field.
   - Modify the text in the **Terms** field. (Term modification may be limited to management personnel.)
   - Enter the appropriate date in the **Due Date** field.
6. Click the **OK** button to display the work order on the **Service** window.



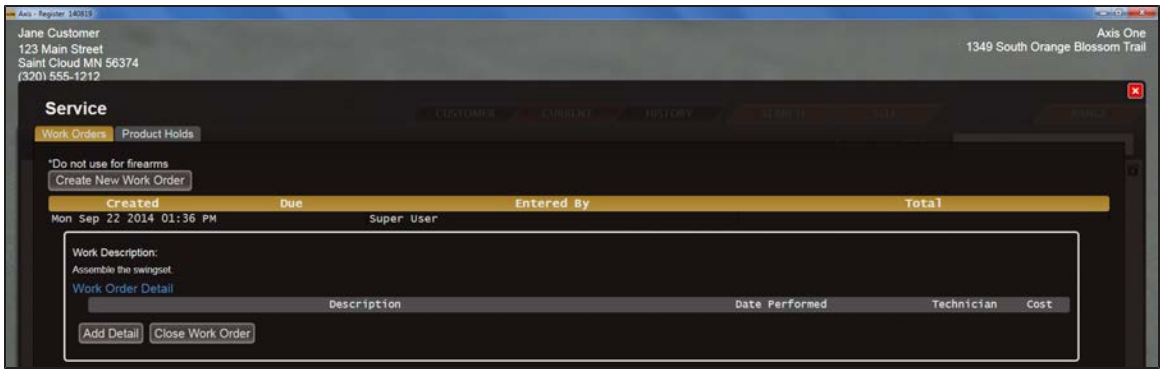
7. If desired, click the work order to display details:



8. Click the **Close** button to close the **Service** window.

View a Customer's Active Work Orders

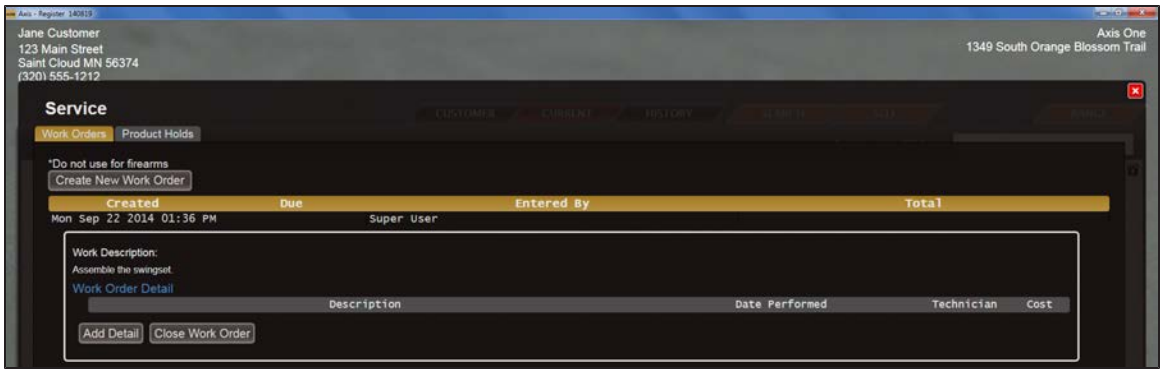
1. Identify the Customer (see page 17).
2. Click the **Service** tab to display the **Service** window.
3. Click the **Work Orders** tab to display the **Work Orders** page.
4. Click the work order to display its **Work Description** record.



5. Click the **Close** button to close the **Service** window.

Add a Detail to an Open Work Order

1. Identify the Customer (see page 17).
2. Click the **Service** tab to display the **Service** window.
3. Click the **Work Orders** tab to display the **Work Orders** page.
4. Click the work order to display its **Work Description** record.



5. Click the **Add Detail** button to display the **Add Work Order Detail** window.

6. Complete the required fields:
   - Enter a description of the work to be performed in the **Description** field.
   - Enter the cost associated with this detail in the **Cost** field.
7. Click the **OK** button.
8. If desired, click the work order to display the added detail:

9. Click the **Close** button to close the **Service** window.

Close a Completed Work Order

1. Identify the Customer (see page 17).
2. Click the **Service** tab to display the **Service** window.
3. Click the **Work Orders** tab to display the **Work Orders** page.
4. Click the work order to display its **Work Description** record.

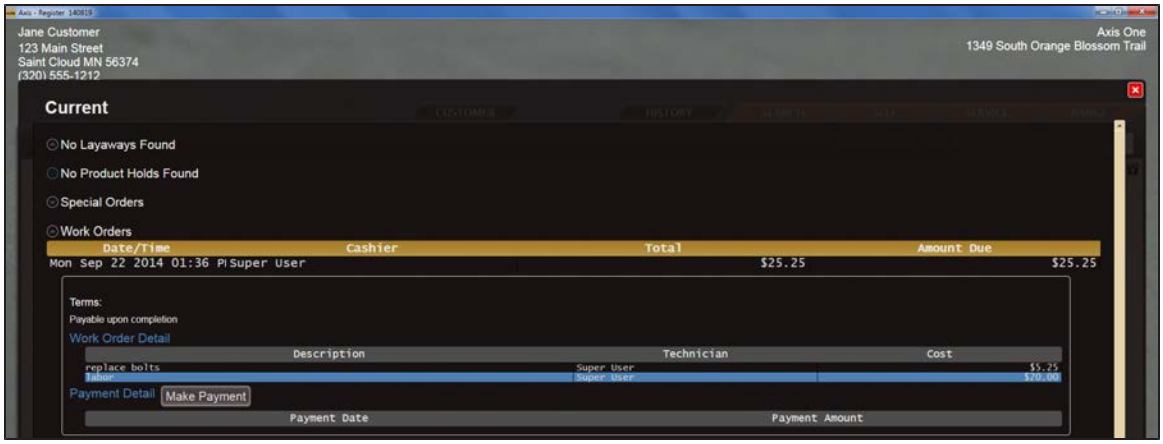
5. Click the **Close Work Order** button to mark the work order as completed and post it to the customer's **Current** window.
6. Click the **Close** button to close the **Service** window.

View a Customer's Completed Work Orders

1. Identify the Customer (see page 17).
2. Click the **Current** tab to display the **Current** window.

   Note: If necessary, click the expand button beside the **Work Orders** heading to display the customer's completed work orders.

3. Click the work order to display its details.



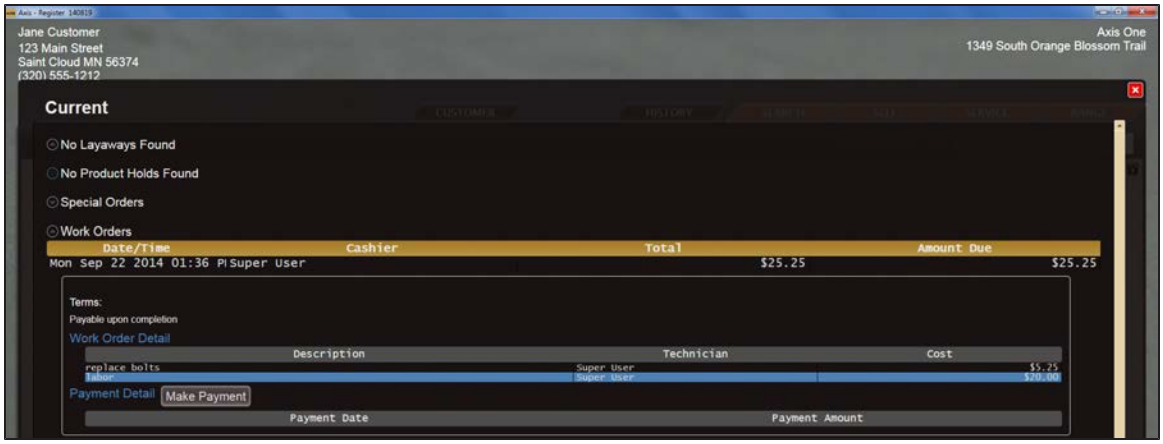
4. When finished, click the **Close** button to close the **Current** window.

Receive Payment for a Completed Work Order

1. Identify the Customer (see page 17).
2. Click the **Current** tab to display the **Current** window.

   Note: If necessary, click the expand button beside the **Work Orders** heading to display the customer's completed work orders.

3. Click the work order to display its details.

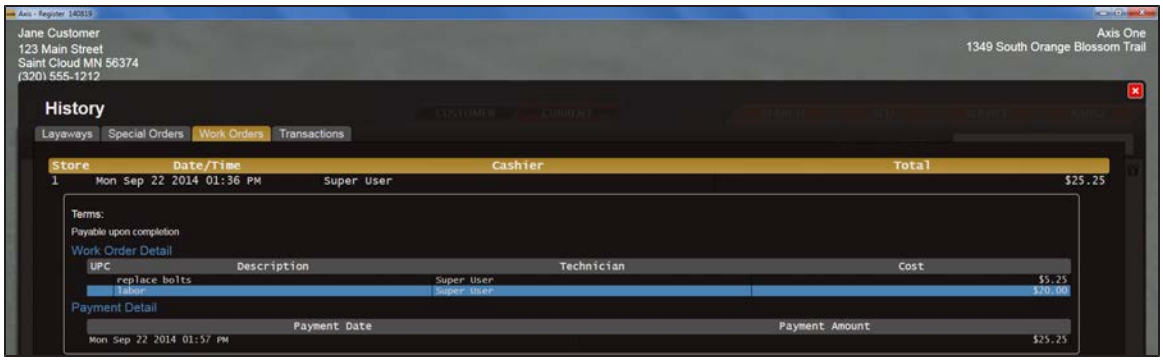


4. Click the **Make Payment** button to close the **Current** window and add the payment amount to the **Cash Register** screen.

5. Complete the transaction to move the work order to the customer's **Work Orders** list on the **History** window.

View a Customer's Work Order History

1. Identify the Customer (see page 17).
2. Click the **History** tab to display the **History** window.
3. Click the **Work Orders** tab to display the **Work Orders** page.
4. Click a work order to display its **Work Order Detail** and **Payment Detail** record.



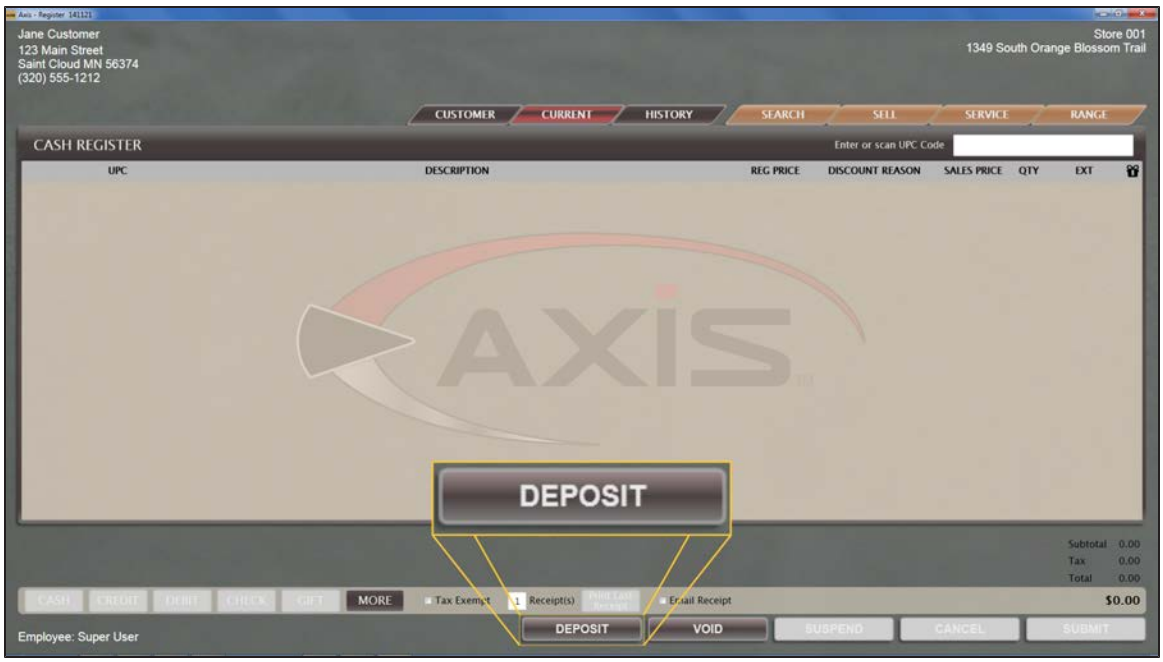
5. When finished, click the **Close** button to close the **History** window.

Deposits

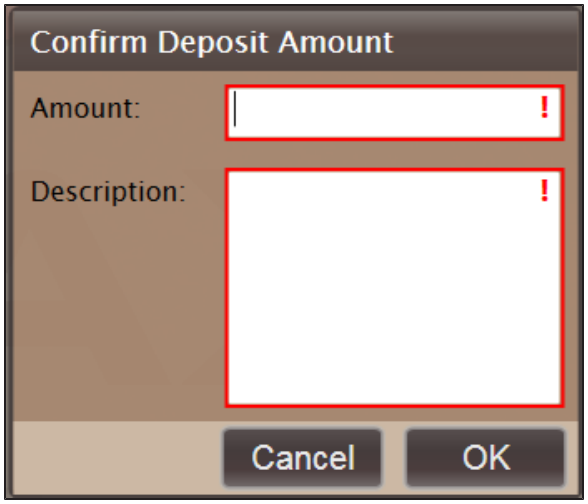
- Receive a Deposit (see page 110)
- View a Customer's Active Deposits (see page 111)
- Apply a Deposit to a Transaction (see page 112)
- Credit a Deposit (see page 27)

Receive a Deposit

1. Identify the Customer (see page 17).



2. Click the **Deposit** button to display the **Confirm Deposit Amount** window.



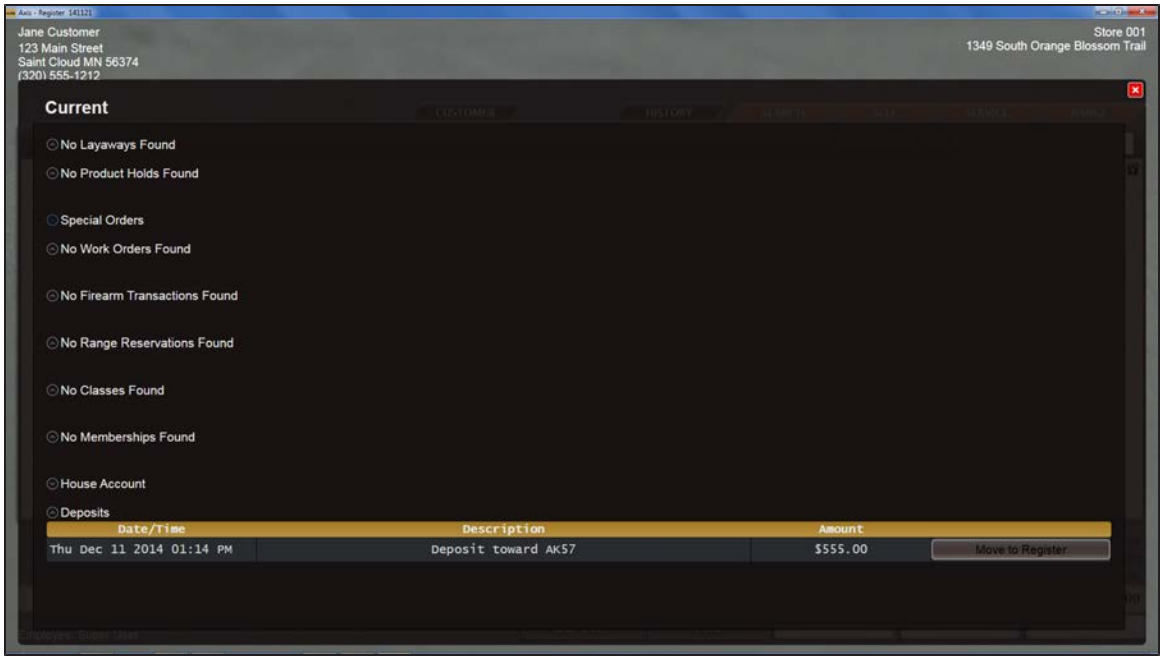
3. Enter the deposit amount in the **Amount** field.
4. Enter a unique description in the **Description** field.
5. Click the **OK** button to add the deposit amount to the current transaction on the **Cash Register** screen.

6. Complete the transaction.

View a Customer's Active Deposits

1. Identify the Customer (see page 17).
2. Click the **Current** tab to display the **Current** window.

   Note: If necessary, click the expand button beside the **Deposits** heading to display the customer's deposits.

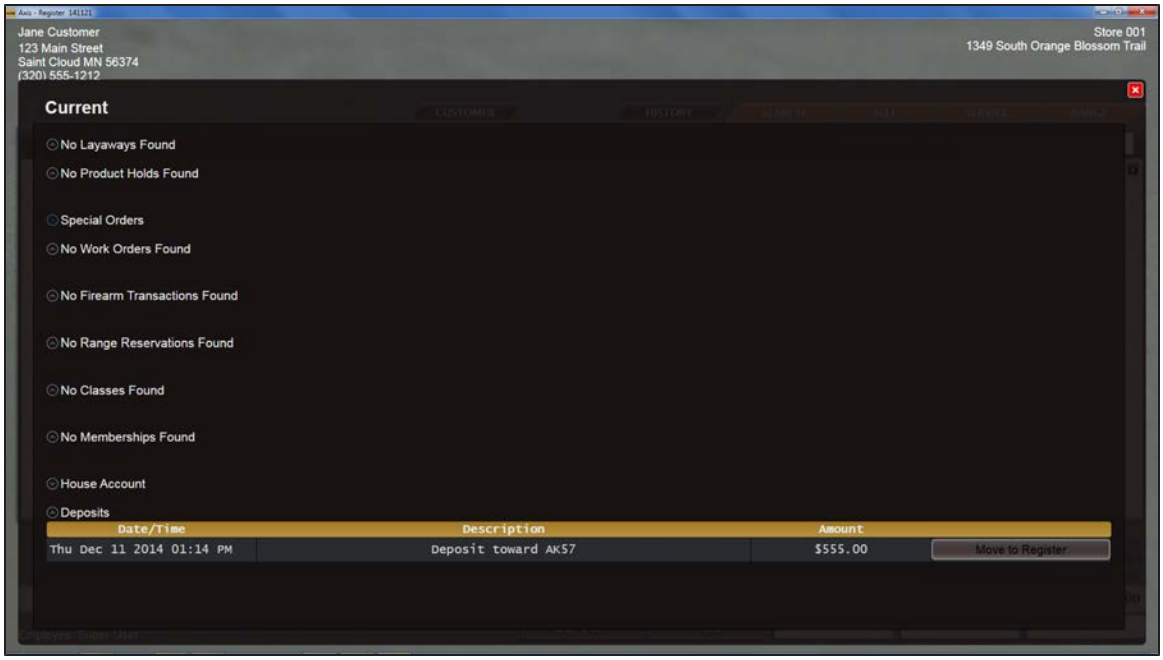


3. When finished, click the **Close** button to close the **Current** window.

Apply a Deposit to a Transaction

1. Identify the Customer (see page 17).
2. Make sure the **Cash Register** screen shows an active transaction with a **Total** amount due.
3. Click the **Current** tab to display the **Current** window.

   Note: If necessary, click the expand button beside the **Deposits** heading to display the customer's deposits.



4. Locate the deposit to be applied to this transaction.
5. Click the deposit's **Move to Register** button to display "**Deposit**" and the total deposit amount above the **Subtotal** amount on the **Cash Register** screen.

6. Address any difference between the total amount due and the deposit amount as appropriate:
   - If the total transaction amount is greater than the deposit amount, complete the transaction as any other, selecting the desired tender type(s) to apply to the amount due. Refer to Accept Payment for a Transaction (see page 24) for more information.
   - If the total transaction amount is less than the deposit amount, complete either of the following procedures as appropriate to address the deposit's remaining balance:
     - **Refund the Deposit's Remaining Balance to the Customer**:
       1. Determine what tender type (e.g., cash, check) will be used to refund the balance.
       2. Click the corresponding tender type (i.e., **Cash**) button to display the **Confirm Return Amount** window.

3. Enter the amount to be returned in the **Amount** field.
4. Click the **OK** button to display the tender type and the entered amount above the **Deposit** amount on the **Cash Register** screen.
5. Complete the transaction and issue the refund.

- **Create a New Deposit from the Deposit's Remaining Balance**:
  1. Click the **Deposit** button to display the **Confirm Deposit Amount** window.
  2. Enter the desired amount (all or part of the remaining balance) in the **Amount** field, enter a unique description in the **Description** field, and click the **OK** button to add the new deposit amount to the current transaction on the **Cash Register** screen. Refer to Receive a Deposit (see page 110) for more information.
  3. Complete the transaction.

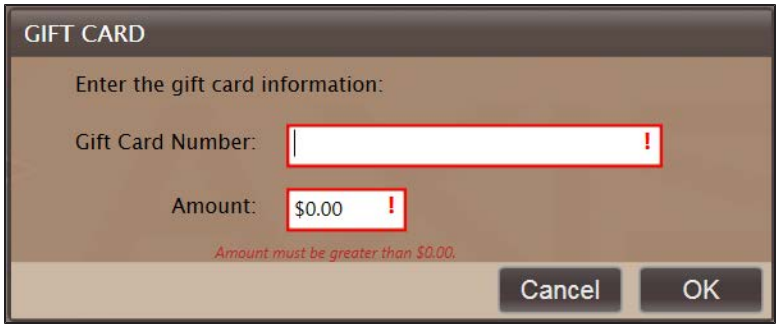
Gift Cards

- Sell a Gift Card (see page 116)
- Check a Gift Card Balance (see page 117)
- Redeem a Gift Card (see page 118)
- Accept a Gift Card Payment (see page 26)

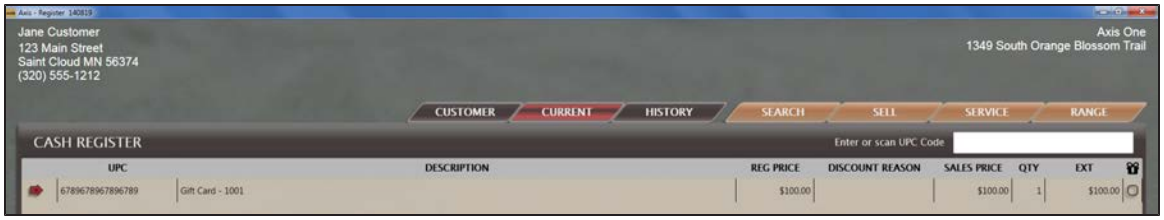
Sell a Gift Card

1. Select the gift card as a transaction item to display the **Gift Card** screen.

   Note: Refer to Add an Item to a Transaction (see page 19) for information on using product entry and search controls.



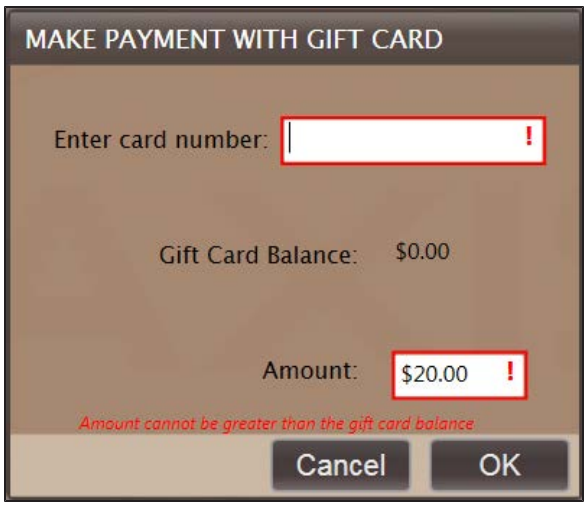
2. Scan or enter the gift card number in the **Gift Card Number** field.
3. Enter the dollar amount to be added in the **Amount** field.
4. Click the **OK** button to add the gift card amount to the current transaction on the **Cash Register** screen.



5. Complete the transaction.

Check a Gift Card Balance

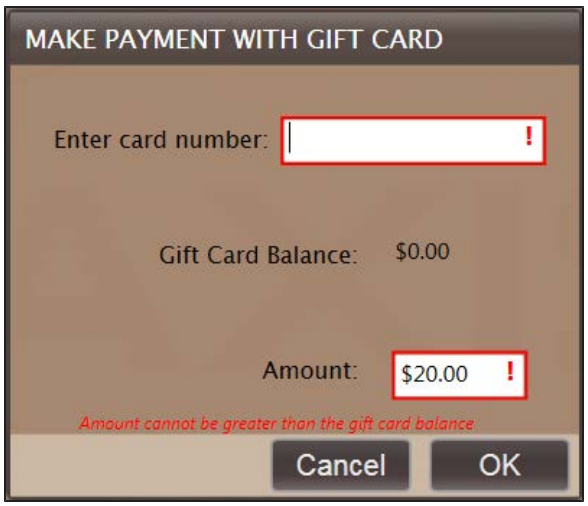
1. Make sure the **Cash Register** screen shows an active transaction with a **Total** amount due.
2. Click the **Gift** button to display the **Make Payment With Gift Card** screen.



3. Enter/scan the gift card number in the **Enter card number** field to display the **Gift Card Balance**.
4. Note the amount shown in the **Gift Card Balance** field.
5. Click the **Cancel** button to close the **Make Payment With Gift Card** screen.

Redeem a Gift Card

1. Make sure the **Cash Register** screen shows an active transaction with a **Total** amount due.
2. Click the **Gift** button to display the **Make Payment With Gift Card** screen.



3. Enter/scan the gift card number in the **Enter card number** field to display the **Gift Card Balance**.
4. Enter the amount (no greater than the balance shown) to be redeemed in the **Amount** field.
5. Click the **OK** button.

Note: Refer to Accept a Gift Card Payment (see page 26) for more information.

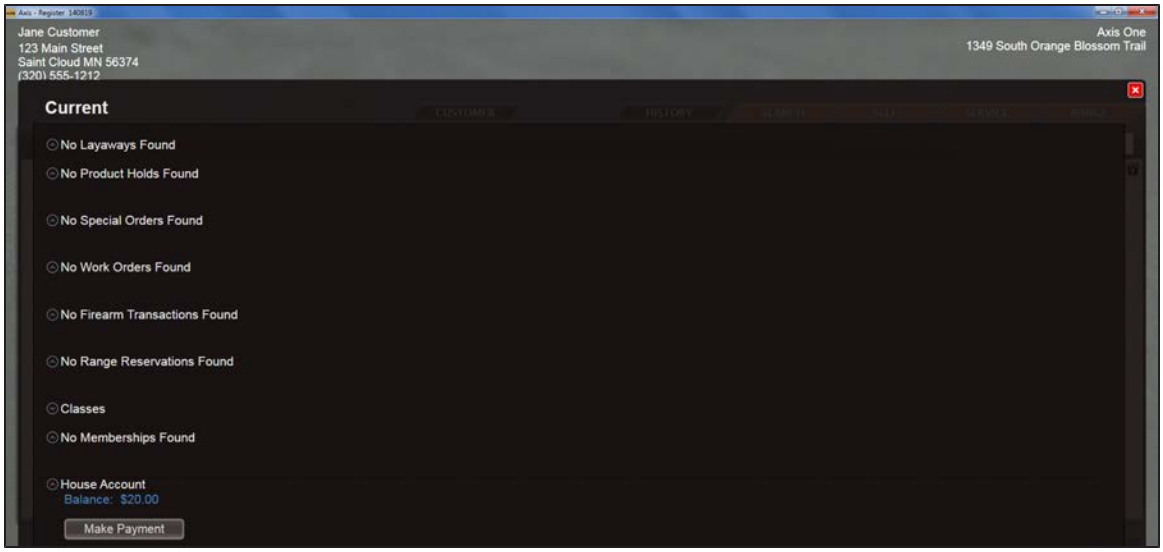
House Accounts

- View a Customer's House Account Balance (see page 120)
- Receive a Payment on a House Account (see page 121)
- Accept a Charge to a House Account (see page 28)

View a Customer's House Account Balance

1. Identify the Customer (see page 17).
2. Click the **Current** tab to display the **Current** window.

   Note: If necessary, click the expand button beside the **House Account** heading to display the account's **Balance**.

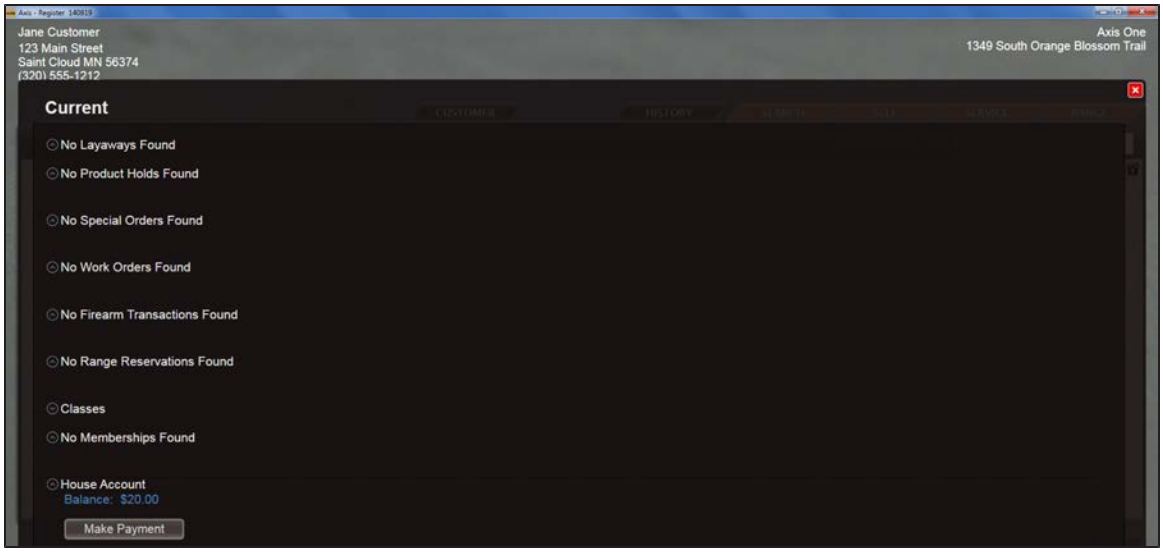


3. When finished, click the **Close** button to close the **Current** window.

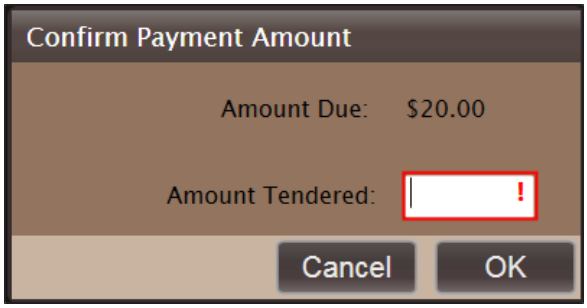
Receive a Payment on a House Account

1. Identify the Customer (see page 17).
2. Click the **Current** tab to display the **Current** window.

   Note: If necessary, click the expand button beside the **House Account** heading to display the account's **Balance**.



3. Click the **Make Payment** button to display the **Confirm Payment Amount** window.



4. Enter/edit the desired payment amount in the **Amount Tendered** field.
5. Click the **OK** button to add the payment amount to the **Cash Register** screen and close the **Current** window.

6. Complete the transaction.

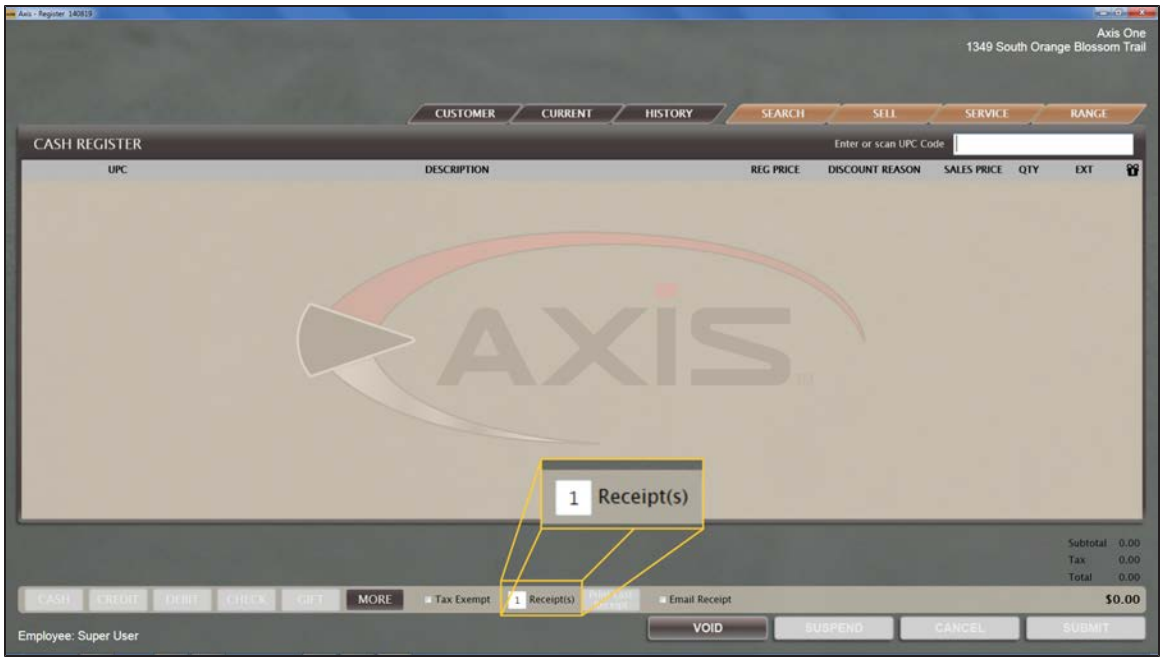
Receipts

- Set the Number of Receipts to Print for Each Transaction (see page 124)
- Email a Receipt for a Transaction (see page 125)
- Create a Gift Receipt for a Transaction Item (see page 126)
- Reprint a Receipt for a Transaction (see page 127)

Set the Number of Receipts to Print for Each Transaction

Note: This procedure establishes the default number of receipts to be printed for every transaction until the number is changed again.

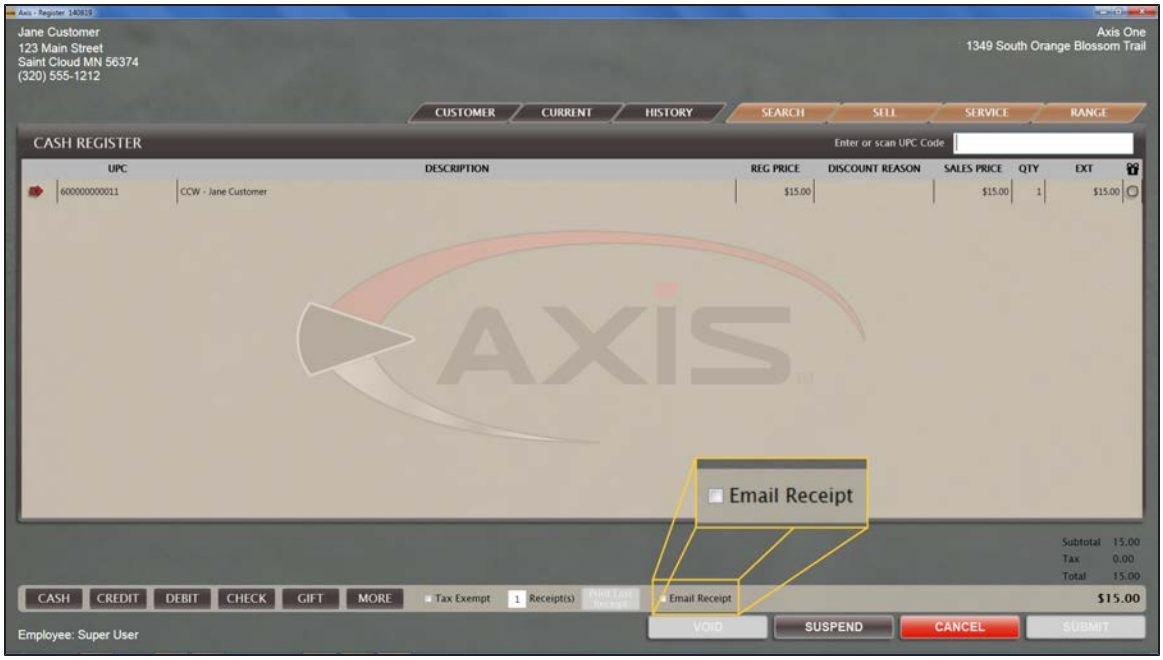
1. Locate the **Receipt(s)** field on the **Cash Register** screen.



2. Enter the number of receipts to print in the **Receipt(s)** field.

Email a Receipt for a Transaction

1. Create a Transaction (see page 16), but do not complete the Accept Payment for a Transaction (see page 24) portion.



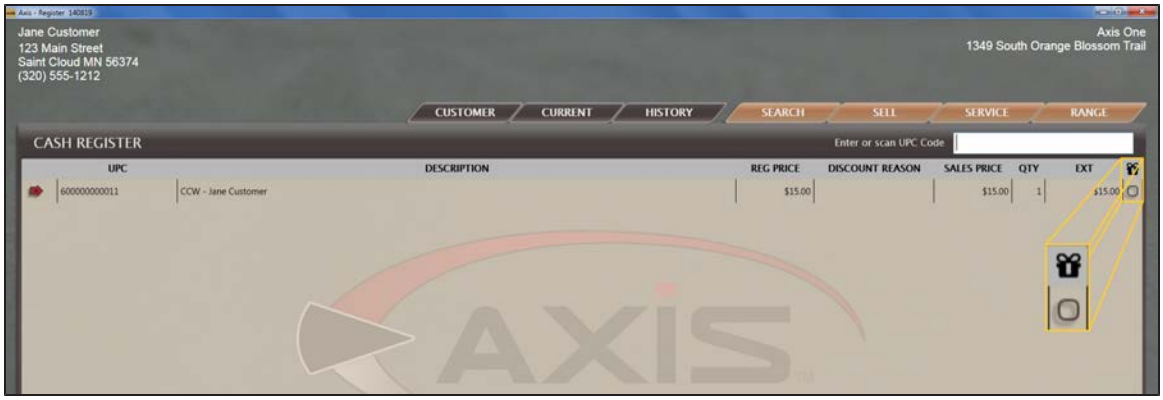
2. Locate the **Email Receipt** checkbox on the **Cash Register** screen.
3. Check the **Email Receipt** checkbox to send a copy of the receipt to the email address specified in the customer's **Customer Information** window.

   Note: If the customer does not have an email address on file, a **Notice** window appears indicating this. Click the **OK** button to close the window.

4. Accept Payment for a Transaction (see page 24) to complete the transaction.

Create a Gift Receipt for a Transaction Item

1. Create a Transaction (see page 16), but do not complete the Accept Payment for a Transaction (see page 24) portion.



2. Locate the desired transaction item on the **Cash Register** screen.
3. Click the **Gift Receipt** button to the right of the item to change the button to red (filled).

   Note: To remove the gift receipt, click the button again to change the button to clear (empty).

4. Accept Payment for a Transaction (see page 24) to complete the transaction.

Reprint a Receipt for a Transaction

Complete one of the following procedures as appropriate to print a duplicate receipt for the desired transaction:

Print a Receipt for the Previous Transaction	1. Clear the Customer Selection (see page 44) and any transaction information that may be selected 2. Click the **Print Last Receipt** button to print a receipt for the most recently completed transaction.
Print a Receipt from the Transaction History	1. Clear the Customer Selection (see page 44). 2. Click the **History** tab to display the **History** window. 3. Click the **Transactions** tab to display all completed transactions. 4. Search the Transaction History (see page 30) as needed to display the transaction. 5. Click the transaction to display its **Transaction Detail** and **Payment Detail** record and the **Print Receipt** button. 6. Click the **Print Receipt** button. 7. When finished, click the **Close** button to close the **History** window.
Print a Transaction from a Customer's Transaction History	1. Identify the Customer (see page 17). 2. Click the **History** tab to display the **History** window. 3. Click the **Transactions** tab to display all of the customer's completed transactions. 4. Search the Transaction History (see page 30) as needed to display the transaction. 5. Click the transaction to display its **Transaction Detail** and **Payment Detail** record and the **Print Receipt** button. 6. Click the **Print Receipt** button. 7. When finished, click the **Close** button to close the **History** window.