

POINT OF SALE

USER GUIDE





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This user guide presents common point of sale functions in Retail Pro. Start by logging into your account at my.retailpro.com

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TRANSACTIONS

NEW TRANSACTION

- ▶ By default, Prism is configured to start a new transaction when a user updates the previous transaction.

CUSTOMERS ON TRANSACTIONS

- ▶ You can enter two customers on a transaction: a Bill To Customer (the customer paying) and a Ship To Customer (customer to whom the merchandise will be shipped).

CUSTOMER ON TRANSACTIONS –SHIPPING INFORMATION

- ▶ To enter the Ship To Customer fields on any of the “simple” layouts, go into Item Details and select the Shipping tab.

LISTING ITEMS ON TRANSACTIONS

- ▶ There are two ways to list items on RP Prism transactions: Scan the item’s barcode to list the item immediately on the transaction or Use Advanced Item Lookup to search inventory for the item.

ADVANCED ITEM LOOKUP

- ▶ Advanced Item Lookup enables users to list items by searching Inventory using search parameters, such as Description 1, ALU, Vendor Code, or Size.

ITEM TYPE

- ▶ The Item Type field indicates whether the item is being ordered, sold, or returned.



QUANTITY AND AVAILABILITY CHECKING

- ▶ If a user lists an item at a quantity that exceeds the available quantity, a prompt is displayed. This gives retailers greater flexibility in handling situations when a customer wants to buy a quantity that exceeds the store's current inventory.

REASONS

- ▶ When performing certain actions at POS, including applying a discount and discarding a transaction, users may be required to select a reason for the action.

POS FLAGS

- ▶ Three optional fields, called POS flags, are available to record additional information with each sale. Typical uses for these flags are to record marketing, promotion, customer demographics, or weather information.

ASSOCIATES

- ▶ "Associate" is the term used to refer to an employee who is on the sales floor assisting customers. By default, the current logged-in user is entered as the Associate for new transactions.

PRINTING

- ▶ Print receipts for the customer at the end of a transaction.

EMAIL RECEIPTS

- ▶ You can email an electronic copy of the receipt to the customer's email address or an email address of your choosing.

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GIFT RECEIPTS

- ▶ Retailers can print gift receipts for customers. Gift receipts are special receipts that include the item barcode, but do not include item prices.

CANCEL TRANSACTION

- ▶ You can cancel a transaction after you have scanned or entered at least one item and before you have updated the receipt.

HELD TRANSACTIONS

- ▶ Transactions can be placed on hold to pause a transaction without cancelling it.

PENDING TRANSACTIONS

- ▶ The Pending Transactions area enables users to access transactions that have yet to be completed.

TRANSACTION LOOKUP

- ▶ Transaction Lookup can be used to locate a previously completed transaction.



EDIT TRANSACTION

- ▶ You can edit certain parts of a transaction after it has been updated.

DISBURSEMENTS

- ▶ Using Prism's Disbursements feature, retailers can record a variety of cash drawer actions that do not occur as a result of a transaction.

PRICE, COST, & DISCOUNTS

PRICE

- ▶ Price is the amount that you charge a customer for an item or service.

DISCOUNTS

- ▶ Users can apply a variety of discounts at POS to lower the price of an item(s).

TENDERS

TENDERS

- ▶ When all items have been listed and all fees or discounts entered, select the Tender Transaction button to access the tender screen.

REMOVE TENDER

- ▶ To remove a tender from a transaction, select the Void button next to the tender.

CASH TENDER

- ▶ Taking a cash payment.

DEBIT CARD TENDER

- ▶ Taking a debit card payment.

CREDIT CARD TENDER

- ▶ Taking a credit card payment.

CHECK TENDER

- ▶ Taking a check payment.

GIFT CARD TENDER

- ▶ Taking a gift card payment.

GIFT CERTIFICATE TENDER

- ▶ Taking a gift certificate payment or selling a gift certificate.

STORE CREDIT TENDER

- ▶ Taking a store credit payment.



RETURNS

RETURN AN ITEM

- ▶ A customer can return an unwanted item to the retailer.

VOID AN ITEM

- ▶ An item listed on a transaction can be voided (removed but still listed on the transaction) if the customer no longer wants to purchase the item.

EXCHANGES

- ▶ An exchange consists of two separate events: a return and a purchase.

TRANSACTION DETAILS

TRANSACTION DETAILS -GENERAL

- ▶ From the General tab of Transaction Details you can select POS Flags, Reason or enter Comments on the transaction.

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TRANSACTION DETAILS - FEES

- ▶ On the Fees tab of the Transaction Details dialog, you can apply fees for shipping, handling, or other expenses associated with a transaction.

TRANSACTION DETAILS -SHIPPING

- ▶ Transaction-level shipping provides retailers with additional convenience and flexibility, especially when multiple items have been ordered and the customer only fulfills part of the order.

TRANSACTION DETAILS -ASSOCIATE

- ▶ Prism includes separate fields for a single Cashier and as many as five Associates.

TRANSACTION DETAILS -PRICE LEVELS

- ▶ A price level is a complete set of prices for items.

TRANSACTION DETAILS -DISCOUNTS

- ▶ Add a discount to the entire transaction after all items have been added.

ITEM DETAILS

ITEM DETAILS

- ▶ You can view/edit a variety of information for the individual items on a transaction. Highlight the item in the item list and then touch or click the Details button.

ITEM DETAILS-ITEM DETAILS

- ▶ On the Item Details tab, you can: Edit doc quantity and price level, View (but not edit) Units/Case, Inventory Type, Order Item Type, Store O/H Qty and Price, If the item is a kit, break the kit into its components.

ITEM DETAILS-DISCOUNTS

- ▶ Give a discount on a specific item.

ITEM DETAILS-SHIPPING

- ▶ Add/change the ship to customer for an item or add a shipping fee for the item.

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ITEM DETAILS-ASSOCIATE

- ▶ On the Item Details - Associate tab, you can change the associate(s) for the currently selected item.

ITEM DETAILS-ITEM NOTES

- ▶ The Item Notes tab of the Item Details dialog has 10 separate item note fields where you can enter information about the item.

ITEM DETAILS-OH QUANTITY

- ▶ The OH Qty tab of the Item Details dialog enables you to see the OH Qty of the item at other stores in the subsidiary.

ORDERS

ORDERS

- ▶ An order is a planned purchase of merchandise by a customer.



NEW ORDER

- ▶ All orders in RP Prism are either Customer Orders or Layaway orders and require entry of a Bill To Customer.

ORDER DEPOSITS

- ▶ If preferences are configured to require a minimum deposit, then a deposit must be taken when the order is created.

FULFILL ORDER

- ▶ When a customer is ready to receive the merchandise, fulfill the order.

ORDER DATES

- ▶ When working with orders (via the Order Details button), users can click an Order Dates button to display a pop-up showing each date field associated with the order.

EDIT ORDER

- ▶ Add or remove item quantities or apply discounts.

CLOSE ORDER

- ▶ Cancel an order and return any deposit to customer.

FEES AND SHIPPING ON ORDERS—INFORMATION

- ▶ Order fees and shipping charges are typically applied at the transaction level.

FEES AND SHIPPING ON ORDERS

- ▶ When an order is being fulfilled, select how to apply the various fees and shipping costs.



SPECIAL ORDERS

- ▶ Special orders enable customers to order items not normally carried in inventory or order a special shipment of an existing item.

CUSTOMER MANAGEMENT

CUSTOMER LOOKUP

- ▶ How to look up customers using the Customer Lookup button in the Customers area.

NEW CUSTOMER

- ▶ How to create a new customer record from within the Customers module.

CUSTOMER DETAILS

- ▶ Different editable fields for customer information.

CUSTOMERS ON TRANSACTIONS

- ▶ Adding an existing or new customer on a transaction.

CUSTOMER HISTORY

- ▶ Use the Customer History tab to verify details of a prior purchase by the customer.

CUSTOMER CONTACT INFO

- ▶ Prism enables you to store as many address, phone and email records as needed for each customer.

CUSTOMER PAYMENT DETAILS

- ▶ The Payment tab displays information about credit, discounts, tax area and other details related to payments.

CUSTOMER STATISTICS

- ▶ On the customer record, select the Statistics tab to view summary information about the customer's purchasing history.

X/Z-OUT REPORTS

X/Z-OUT

- ▶ Retail Pro's X/Z-Out area provides all the tools to securely count money, reconcile receipts, and balance the cash drawer.

X-OUT REPORTS

- ▶ An X-Out report provides a snapshot of sales activity for a specific time range.



Z-OUT CLOSE (UNSTRUCTURED)

- ▶ How to close a drawer when using unstructured reports, which do not require the entry of an opening amount.

Z-OUT CLOSE (STRUCTURED)

- ▶ How to use structured Z-Out reports which require that Open and Close Amounts are entered as separate processes.

COUNT CURRENCY

- ▶ Enter a count for each denomination of currency in the current drawer.

NON-CURRENCY MEDIA

- ▶ Verifying non-currency media, such as matching receipts for debit card and credit card transactions.

RECONCILE OVER/SHORT AMOUNTS

- ▶ Reconciling compares the closing amounts entered by the user to the transaction activity for the selected time range.



Z-OUT LOOKUP

- ▶ The Z-Out Lookup area enables you to review and print previously-run Z-Out reports.

PROMOTIONS

PROMOTIONS AT POS

- ▶ By default, Promotions will be applied automatically when the validating rules are met.

PROMOTIONS - COUPON

- ▶ Coupons can be added or selected under the Coupons tab next to Transaction Details.

PROMOTIONS AND MAXIMUM DISCOUNT %

- ▶ Promotions cannot discount an item past its established maximum discount percentage.

COMBINE PROMOTIONS

- ▶ Certain promotions can be combined so that multiple promotions are applied on a single transaction.

DEPARTMENTS

DEPARTMENT LOOKUP

- ▶ Departments enable retailers to group items logically, such as by item type, or by physical location.

INVENTORY

NEW INVENTORY ITEM

- ▶ Add new items to inventory so that they can be purchased by customers.



FILTER, SEARCH INVENTORY

- ▶ Search for specific inventory items and select criteria for searches.

STYLES

- ▶ Styles enable you to group inventory items that possess similar characteristics, but vary in size, color, or some other attribute.

INVENTORY - OPTIONS

- ▶ You can choose to print tags for inventory items.

EMPLOYEE GROUPS

TIME CLOCK (CHECK IN/CHECK OUT)



Check in or check out at the beginning or end of a shift.

MISCELLANEOUS

SEND SALE



A Send Sale is a special type of sale that enables retailers to record a sale of items at one store and send the transaction to a different store that has available inventory for fulfillment.

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