





CHAPTER

The Customer Module

The Customer Module can be used to track your customers and your employees' information in one place. You can store credit card numbers securely, preferences; and set up recurring charges.

From the home screen of POSExpress, navigate to the **Customer** icon:



This will present a blank customer screen. Only the account *A Cash Account*, the default account with Acct # 0, should be showing. The following example is what should be seen.

•••

Customer	POSexpress Customer Management
Search	Customer Information
Name/Acct: Type: Class: Customer Lookup Inactive OActive Customer List	Username: Renew Date: 7/15/2009 × Password: Expire Date: 7/15/2009 × Gender: × Company: Type: × Store:
Acct Name D A Cash Account	Class: Founder Bill thru club Reciprocal Freeze Address/Phone Credit Card County: Count
Import Total 0 Item	Add New Save Inactivate Reset EXIT

Creating a New Customer

To create a new customer, select the *Add New Customer* button. The following screen will be presented.

Add New Cu	stomer				*Click in pi select pictu	ire. X
Account#:	4					
Driver License#:						
First	Name:					
Middle Initial:						
Last Name:		🔽 Sales not	е рорир			
Birthday:	7/16/2009 💽 Gender Unknown 💽					
Email:		BI				
Customer Type:	Class I Member					
Customer Class:	Member					
Address 1		Address 2	2			
Street:	A	Street:				~
						~
Zip:	City:	Zip:		ci	ty:	
State/Province:		State/Pro	vince:		,	
County:		County:				
Country:	United States	Country:		United States		•
-Phone Number -	- Primary Phone (Use in StarterHut)					
Mobile		Busine	ss			
Home		Fax				
Course:	All Stores	-	Bank I			
Expired Date:	7/16/2010		Banqu	-		
Loyalty Level:		•	Code	Banque		
Company:	·		Code (Guichet		
	1			o de Compte 🗍		
			Clé RI			
	🗖 Disable Auto Gratuity		Region		City	
Billing Notify:	ent C Email Statement C Both		Postal		Address	
						5
					ОК	Cancel

Fill out the information of the Customer in the fields accordingly. The customer types and classes are based off of the reference tables in *Options -> Reference Tables -> Customer Class & Customer Type.*

- *Customer Classes* are general categories that customers are placed in. For example, Members, Employees, and Kitchen Staff might need to be created for a restaurant. Customer Class is used for tiered pricing.
- *Customer Types* are categories that customers are placed into as part of a sub-class. For example, after creating the Kitchen Staff under *Customer Classes*, Waiter, Hostess, Cook, and Chef might need to be created because they are different types of the Kitchen Staff Class.
- These different *Classes* & *Types* help to keep track of customers easier and refine searching through the customer list.

When you are finished, select OK.

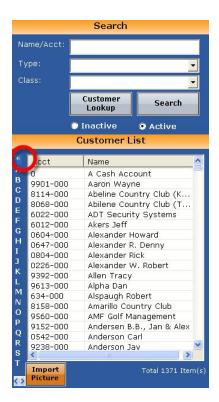
Note: The *Account#* will automatically select the smallest number that has not been used yet. This can be manually entered by typing over it

Note: If the system includes a card reader, swiping a driver's license at this time will fill in some of the information.

Note: Check the *Sales Note Popup* if the customer requires some special information upon each sale. The information typed in this box will popup when the customer is selected.

Customer Search

To pull up an alphabetical list of all customers, select the asterisk (*)



To search by last name, click the letter the last name begins with and the software will populate a list of all members whose last name starts with that letter.

		Search	
Na	ame/Acct:		
Ту	/pe:		-
Cl	ass:		•
		Customer Lookup	Search
		Inactive	• Active
		Customer L	ist
*	Acct	Name	
A	9479-000	Gahm Phillip	
B C	8323-000	Gaillardia Co	ountry Club
U D	0441-000	Gallagher Ch	narles
E	9067-000	Gallagher De	enny 📃
E	0623-000	Gallagher Ke	
G	1808-000	Gallagher M	
ч.	0838-000	Galligan Tim	
I	0543-000	Gamel Thom	denter de la constance de la const
Ĵ	6043-000	Gangel Beth	
ĸ	9331-000	Garcia Ernie	
L	8177-000	Garden City	
M	8031-000	Garden of t	
N	0786-000	Gardner Teo	
0	9464-000 0825-000	Garrett Tom Gart John	<u> </u>
Р	9506-000	Gaviria Andr	
Q	8260-000	Gee Greg	85
R	0324-000	Georae Rich	ard 🔽
S	<	George Kich	
т < >	Import Picture		Total 73 Item(s)

By typing in the name or part of a name, of a customer into the *Name/Acct.* and selecting *Search*, the software will populate any members with this text anywhere in their first, middle, or last names.

• For example, if 'Tim' is entered, the list will include anyone with the first name of Tim, to customers with the last name of Timbers, and anyone with 'tim' anywhere in their name.

ame/Acct:	tim					
ype:						
ass:						
	Customer Lookup Search					
	🖲 Inactive 💿 Active					
	Customer List					
Acct	Name					
9312-000	Bateman Tim					
0838-000	Galligan Timothy					
9102-000	Grant Tim					
0674-000	Harrington Tim					
9239-000	Kohn Tim					
0710-000	Noonan Timothy					
9416-000	Petrovik Tim					
0486-000	Schmidt Timothy					
9128-000	Timbers Jr. Mike					
9079-000	Timbers Ken					
0268-000	Timbers Michael					
0553-000	Timbers Stephen					
0796-000	Travis Timothy					
Import	Total 13 Item(s					

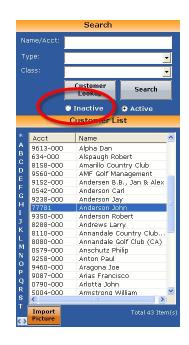
Searching can be narrowed down by selecting a *Customer Type* and/or *Customer Class* from the drop down menus, as well. These are the same types and classes that were created in *Options ->* Reference Tables -> Customer Class & Customer Type.

Inactivate/Reactivate Customer

Select the customer that needs inactivated. Select the *Inactivate Customer* button. A warning will pop up asking if you are sure you want to inactivate the customer. Select *Yes* to inactive the customer and *No* to cancel.

They will be taken out of the Customer List. When a customer is inactive, it takes away their privileges to process sales, including Sales, Food and Beverage, and Member charges.

To reactivate a customer select the Inactive radio button under the Search Section



Selecting this button will bring up a list of all the inactive customers. To reactivate a customer, select the customer and select the *Reactivate Customer* button. This will put the customer back into the active Customer List, and re-allow them sales privileges.



The Inventory Module

The Inventory Module is used to track everything that relates to your store's inventory. This includes suppliers, sales categories, purchase orders and stock notifications c^{∞} commission.

From the home screen of POSExpress, select the *Inventory* icon:



This will open the Inventory module. There are several buttons across the top of the Inventory screen. This document will focus on the basics of creating an inventory item. The other buttons will be explained in separate documents.

When opening the Inventory screen, the Products page is displayed. See the image below.

I	ventory		PO	POSexpress Inventory Management								
Products	Products by Supplier	Suppliers	Sales Rep	Purchas Orders		Gift Card	Rai	n Check	Package	s Modifier		
Se	earch & Produ	ict List		1		Crea	ate Nev	v Product				
Product:		Go	Product Setup	Order Info	Tier Price	Advance	Other	Modifiers	Notes			
Suppli	er	Category		Item Type	Product			-				
All]	[AII]		•	Supplier				•				
Sort by age 🤅	🕽 Asc 🕥 Desc 📃	Show Discontinued Ite	ms	Category				-				
Code	Descrip	tion	Pr	oduct Code				_				
L	1			Description								
OTTLERETUR DeclareCashTi		Return I Cash Tips	_									
OnlineHandling		ore Handling Fe	C C	atalog Cost	1	0.00	Size:					
OnlineShipping	gItem Web St	ore Shipping Ite		Tax Code	N/A	Not 💌						
RENTALCHARG			Г Тах	Inclusive Price:			Season	Code:				
SERVICECHAR Test1	GE Gratuit Test It		-	Retail Price	-	0.00			1			
Test2	Test It			Retail Price	1	0.00						
			Trac	k Inventory	Y	es						
			Adina V	/iew	1							
										_		
			-Cost De									
			Cost De									
				Ave	Cost	1	\$0.00	Units in sto	ock 0			
				Las	t Cost		\$0.00	Units on or	der 0			
			_	Las		1	+0.00	0.1109 011 01	Io			
			New	Cancel	Save	Delete	Receive	Print Price	Physical	Sale		

On this screen, there is a *Search & Product List* section. This section will display all items in inventory and are listed in Product Code order, ascending to descending. This order can be reversed by clicking the *Code* or *Description* heading at the top of their respective columns.

For a more effective product search, there are search filters for *Product*, *Supplier* and *Category* located at the top of the Search and Product List. These filters allow the user to narrow the search for a specific product based on the desired criteria. In the example below, Adidas was selected in the supplier filter. Applying this filter will display only items that have Adidas as the supplier.

The search can then be narrowed even further by utilizing the Category search filter. In the example below, Men's Shirt is applied in the category filter. Applying this filter, in combination with the Adidas supplier filter, will display only those items in the Men's Shirt category with Adidas as the supplier.

Once the item appears in the Search & Product List, simply select the item and the details related to that item will appear in the Product Information field. (not shown in the image below)

In	ventory			POSexpress Inventory Management								
Products	Products by Supplier	Suppliers	Sal	es Rep	Purcha Order		Gift Card	Rai	n Check	Packages	s Modifier	
Sea	arch & Produc	t List			1		Crea	ate Nev	v Product	t		
Product:		G	2	Product Setup	Order Info	Tier Price	Advance	Other	Modifiers	Notes		
Supplier		Category			Item Type	: Produc	t		•			
Adidas	Mens		•		Supplier	:			•			
Sort by age 💿		Apparel Outerwear			Category	:			-			
Code	D Mens	Shirt		Pr	oduct Code				_			
PS1272	Shoes	al Order	=		Description							
PS1007 PS1279	Wome	n's Bottoms			atalog Cost		0.00	Size:				
PS1234		n's Outerwear n's Tops yn Stripe Poic		J	Tax Code	-	Not 🔻	0120.				
PS1010 PS1008	Adidas P	encil Stripe Poic	010	- T-	I ax Coue Inclusive Price	-		Season		-		
PS1011		1Stch Fancy P	olo	I IdX				Season	Code:	1		
PS1275 PS1009		1esh Jq Polo ersey Solid Po	lo		Retail Price	:]	0.00					
PS1235		on-Stripe										
			-		k Inventory	: Y	es					
				Aging \	/iew	-			-		-	
				Cost De	tail ———							
					Av	e Cost		\$0.00	Units in st	ock 0		
					La	st Cost		\$0.00	Units on o	rder 0		
							1	+0.00	onito on o			
				New	Cancel	Save	Delete	Receive	Print Price	Physical	Sale	

Creating a New Inventory Item

When creating a new item in POSExpress, there are five required fields. They are *Item Type*, *Supplier, Category, Product Code*, and *Description*. An icon that looks like this, **()**, will appear next to any field that is missing required information. These five fields will be described in detail. The remaining fields; Catalog Cost, Tax Code, Tax Inclusive Price, Retail Price and Track Inventory will be briefly described.

To create a new item in the *Inventory* module, select the *New Product* button and a *Create New Product* window will replace the *Product Information* window. All fields will be Null, awaiting info to be entered related to the new item.

For most common inventory items, the *Item Type* will be *Product*, as seen in the example below. This is the default setting when creating a new item. The other choices in the Item Type drop down menu will be explained in separate documents.

1	nventory	8	PO	POSexpress Inventory Management									
Products	Products by Supplier	Suppliers	Sales Rep	Purchase Orders	Gift Card	Rain Check	Packages	Modifier					
S	earch & Proc	luct List			Cre	ate New Produc	t						
Product:		G	Product Setup	Order Info Tier Pr	ce Advance	Other Modifiers	Notes						
Supp	lier	Category		Item Type: Proc	uct	•	Г						
All]	- [All]	-	Supplier:		-							
Sort by age	💿 Asc 💿 Desc	Show Discontinued It	ems										
and the second second second second	and the second	- And a second se	100	Category:									
Code **** TO GC		ription TO GO *****	Pi	oduct Code:									
10 00			_	Description:									
100 Club Eve 100 G		Event											
100 G 100 K&Q	Regri	p and Queens Eve	_	atalog Cost:	\$0.00	Size:							
100 KaQ 100 L		nal Lesson	n.	Tax Code: n/a	Not 🔻								
100 L 100 McG		adrev Event Fee	- 1		Inde								
100 McG 100 Old Pal		al Event Fee	- Tax	Inclusive Price:		Season Code:							
100 Openina		ing Day Event Fe	e	Retail Price:	\$0.00								
100 PC		dent's Cup Entry		Recail Price.	p0.00								
100 RM		Aan Event Fee											
100 WML	Wed	Men League Fee	Trac	k Inventory:	Yes								
1000 Island	1000	Island											
1001	Memb	per Round 18 Hole	es Aging '	/iew									
1002		per Round 9 Holes											
1018		Fee Member 18 H	and the second se										
1019		Fee Member 9 Ho	and a second sec	tail									
1019A		orate Non Membe	r.	Ave Cost		\$0.00 Units in s	tock 0						
1020		te Cart 18	_			+ ones nos							
1021		te Cart 9	_	Last Cos		\$0.00 Units on a	order 0						
1022		t Round 9 Holes		Last Cos		\$0.00 Onics on c	i doi 10						
1025 1026	Gues	t Cart Fee 9 Hole t Greens Fee 18 F				Print							
1026	Gues	t Greens Fee 18 H t Croop Eco () Hol	New Product	Cancel Save	Delete	Receive Product Price	Physical Inventory C	Sale EXI					

Creating a New Supplier

To create a new Supplier, go to the *Inventory* module and select the *Supplier* tab. Select the *New Supplier* button and the *Create New Supplier* window will be displayed. Enter the relative information accordingly and select *Save*. The new supplier will then be added to the *Search & Supplier List*.

The *Sales Rep* field can only be populated by a Sales Rep that already exists in your database. *In order to associate a Sales Rep to a Supplier, you must first add the Sales Rep.* This is done by selecting the *Sales Rep* button at the top of the Inventory module and then choosing the *New Sales Rep* button at the bottom of the screen. This will open the *Create New Sales Representative* window and allow the user to enter the relative information.

I	nventory	$POS\epsilon$	express Inve	entory Manag	ement			>
Products	Products by Supplier Suppliers	Sales Rep	Purchase Orders	Gift Card	Rain Ch	eck Pack	ages	Modifier
S	earch & Supplier List			Creat	e New Si	upplier		
and an		Supplier:				Account #:		
	G	Company:			•	Terms:	í –	
-			-		<u> </u>			
Supplier Id	Supplier Name	Contact:]		Terms Type:		
28	Adams	Address:						
27	Adidas	Address.						
47	Ahead	Postal:		Dity:				
59	American Brand Golf							
35	American Dry Goods	State:	Cou	ntry: United St	ates 💌			
37 26	Antigua	Email:						
38	Bridgestone Bushnell							
25	Callaway	WebSite:						
25	Cleveland	Phone:		Fax:		-		
50	CMC Golf		-					
23	Cobra	Sales Rep:			-	🗏 Can Auto	1 40	
49	Cutter & Buck	Title:		First:				
29	Ecco	Title:	¥	11150				
46	EP Pro	Init:		Last:				
22	Fairway & Greene					_		
21	Foot Joy	Address:						
20	Gear							
33	George Landis	Dentel		City:				
52	Global Tour Golf	Postal:		City:				
67	Gogie Girl	State:	0	ountry:		-		
56	Golbal Tour Golf							
55	Golo/Front9,INC	Email:						
19	Great Divider	Phone:		Cell Pho	nne:		Fax:	
48	Greg Norman			oon me				1
18	Haas-Jordan	New			1			
58	Imperial Hats	Supplie	Cancel	Save	Dele	te		EXIT >>

If a supplier's information changes, it should be edited in POSExpress. To edit a supplier's information, first locate the supplier in the *Search & Supplier List*. Then, make any necessary changes and select *Save*.

Creating a New Sales Category

Each inventory item in POSExpress must belong to a corresponding Sales Category. Sales Categories enable the user to filter items more quickly, as well as organize and customize reports more effectively.

To create a new category, select the *Sales Category* button at the bottom of the Inventory module. The Sales Category screen will be displayed.

4	ventory		PC	Sexpress Inv	entory Man	nagement				>
Products	Products by Supplier	Suppliers	Sales Rep	Purchase Orders	Packages	Modifier				
Se	arch & Produ	uct List					Create Nev	w Product		
Product:		Go	Product	Order Info Tier	Price Advance	Other Modif	iers Notes			
Suppli	er	Category		Item Type: Pro	duct			1		
All]	▼ [All]		•	Supplier:		•				
Sort by age	Asc 🔿 Desc 📃	Show Discontinued Iter	ns	Category:		•				
Code	Descrip		P	roduct Code:						
KOS1	King of	Sweets Candy	_	Description:						
				Catalog Cost:	0.00	Size:				
			_	Tax Code: N/	A Not •					
			🗆 Тах	Inclusive Price:		Season Code:			•	
				Retail Price:	\$0.00				_	
			Tra	k Inventory:	Yes					
			Added		11/-) 5 5		ſ			
			Added	Mor	ith(s) First R	eceive Date		Rental		
			Cost D	etail						
				Ave Co	st	\$0.00 Units	n stock)		
			_	Last Co	st 📕	\$0.00 Units	on order 🕇			
			New		ve Delete	Receive Pri	nt ce Physica Invento	Sale		EXIT

Select Add

Option List	1									
Accounting Administrator tools AutoUpdatePatchServer		anage Sales ect category from			iate task.					
 ClientDownloadFromCPS Credit Card/Gift Card 	I	Description	Loy	General Led	Discount	Charge	Min	Standard	Ex	Add
 Customer Management Options Employee Extension General Options Global Options Hardware/Receipt Inventory Options IPPF Settlement Reference Tables Report Options Sales Options ServerProductPath Setatement 	2 13 1 3 12 7 10 8	Bottle Deposits Candy Gift Card Membership Pay Out Payment PREPAID Rain Check Rental Charge Service Charge Shipping	No No No No No No No No No		Yes No Yes Yes Yes Yes Yes Yes Yes Yes	Yes No Yes Yes Yes Yes Yes Yes Yes Yes Yes	No No No No No No No No	0.0000 0.0000 0.0000 0.0000 0.0000 0.0000 0.0000 0.0000 0.0000	0.(0.(0.(0.(0.(0.(0.(0.(0.(0.(Edit Delete
		Show in Customer I	nformatic	n					Þ	
Accounting									[Clos

The screen shown below will be displayed.

	View Tools Help Goto						- ć
2	Option List						
Statedult Solder Investment Distance Bannet ER Email Eulassians	CNB Color Code Company Coupon Currency Exchange Rate Customer Class Customer Class Customer Student Status Customer Student Status Customer Student Status Customer Student Status Customer Student Status Department Discount Button Setup Discount Reason Gratuiky Item Kits Location Code Nationality Information PMS Itemizer Profit Center Sales Category Sales Referrals Sales Types Season Code Tax Terminal Information Web Store Departments Report Options ServerProductPath ServerVersion	□ Loyalty □ Min Eligible □ PrePaid	etting Remote unt ce Charge ier	Commission	(e.g. Acces COGS GL: Inv GL: Ranking:	I Itemizer Des Statement D Category	v v in: v
Sa	es Category Management.						
							Close

Enter an ID and Description for the new Sales Category. There are many other options within this screen, some may be relevant to your facility and some may not be. *The ID and description are the only required fields to create a new Sales Category.*

This screen also contains three tabs, *General, Price Setting* and *Remote*. Again, these tabs contain options specific to this category and may or may not be relevant at your facility. If you need assistance, please contact your administrator or Prophet Systems Support.

After completing the necessary and relative information, scroll to the bottom of the screen and select *Save*. Next, select *Close* and the software will return to the Inventory module. Select *Exit*. Leaving the *Inventory* module allows the system to refresh and this will add the new Sales Category to the *Category* drop down menu.

Product Codes & Descriptions

Each inventory item requires a product code and description. These pieces of information are left entirely up to the user to create. Both alpha and numeric characters are accepted in these two fields.

Typically, there are two theories used when creating product codes. A code can be created by the user, or the user can utilize the bar code that is provided by the supplier. An example would be an item that comes in various sizes, colors and styles but, they all have the same cost and retail price. In this scenario, the user could decide to create their own product code for ALL sizes, colors and styles *or* utilize the bar code that is provided by the supplier for each different size, color and style.

Using the first option, the user creates a code, means there would be one inventory item in the database for ALL the sizes, colors and styles. Basically, this is a "price point" philosophy. Meaning, it doesn't matter what size, color or style the item is because they are all the same cost and price. The inventory related to the specific size, color and style will be managed manually. In this case, the user would simply enter one generic product code in the product code field. This code would be used for all the items.

Using the second option, the factory bar code is used, usually means there will be a separate item code for ALL the sizes, colors and styles. This is because the supplier typically provides a separate bar code for all sizes, colors and styles. There will be a separate item and code in inventory for all items. In this case, the user can scan or enter the bar code provided by the supplier into the product code field for each item. The inventory, as it relates to size, color and style, can be managed within the software.

Remaining fields and brief descriptions

- Catalog Cost Enter the cost of the item. This will be used in cost averaging calculation. If and when the cost changes, that change will be entered as part of the *Receive Product* process.
- Tax Code Enter the applicable tax code. If the item is not taxable, select N/A.
- Tax Inclusive Price (optional) Enter the total price, *including tax*. The software will calculate the tax, using the applied tax code for the product. The price before tax will be displayed in the *Retail Price* field. This is an optional feature. It is not required to have a tax inclusive price.
- Retail Price Enter the retail price. The software will apply the applicable tax during the sales process.
- Track Inventory This is a toggle button that is changed simply by clicking on it. When set to Yes, the software will keep a "real time", perpetual count of the item. The item must be received into inventory in order to sell it. This is typically used for hard goods, such as shirts, pants, etc.

When set to No, the item does not need to be received into inventory, therefore the software does not keep a "real time", perpetual count of the item. This is typically used for soft goods, such as memberships, lessons or other types of services and fees.

Both options, Yes and No, enable the user to retrieve sales information. This option is specifically for physical inventory purposes only

Gift Cards

Once a gift card is issued, it is listed in the *Gift Card* window, within the *Inventory* module. Here the user is able to view the current balance, card history, reset or disable a card, as well as make any necessary edits.

Gift Card Search

To search for a gift card, enter the gift card number or the name to whom the card was issued into the *Search & Gift Card List*. When the card appears in the list, select it. The details associated with that card will be displayed in the *Card Information* window. See example below.

Inv	entory	PC)Sexpress Inver	ntory	l 1anagen	nent		
	roducts by Supplier Suppliers	Sales Rep	Purchase Orders	Gift	Card	Rain Check	Packages	Modifier
Searc	ch & Gift Card List				Card Ir	nformation		
Gift Card: te	st		Card	_				-
ant cara. to			Card Number:	1234	567890			Change Code
Card Status: Of	pen 🗾		Holder Name:	Test,	Custome	r		
Code	Holder		Amount:		\$50.00	Card Hist	ory	
1106-000229	Southwoods Surgery Cer	nte		-		- Odra mis	,	
1106-000230	Southwoods Surgery Cer		Current Balance:		\$50.00			
1106-000231	Southwoods Surgery Cer							
1106-000232	Southwoods Surgery Cer							
1106-000233	Southwoods Surgery Cer		Update gift card					
1106-000234	Southwoods Surgery Cer		-Card Details					
1234567890	Test, Customer		Created Date:					
977230	Pin Shot		Created Date:		8/7/2009			
977231	Pin Shot		Last Updated	Data	8/7/2009			
977232	Pin Shot		Last opuateu	Date:	18/7/2009			
977233	Pin Shot				C Discon	tinued?		
977234	Pin Shot				r biscon	anaca.		
977235	Pin Shot				1			
977236	Pin Shot		Expired Date:		1/ 1/20	99 💌		
977237	Pin Shot		Expired Date.		1 4/ 1/20	· ·		
977238	Pin Shot							
977239	Pin Shot							
977240	Pin Shot							
977241	Pin Shot							
977242	Pin Shot							
977243	Pin Shot							
077944 K	Din Chat							
2.000 H						Reset	-	
	Recalc Gift Ca	d Nev	A. Cancel	Save	Disab	le Gift		EXIT

Creating a New Card Using the Gift Card Window

Typically, a new gift card is issued by selling it to a customer through the Sales screen. POSExpress also allows the user to create a card on the *Gift Card* screen in *Inventory*.

To issue a gift card manually, without using the sales screen, select the *New Card* button. The *Create New Card* window will appear. Enter the card number, holder name, and amount, and select *Save*. The card will now be active and available for use. The new gift card will also now appear in the *Search & Gift Card List*.

Inv	ventory	PC	POSexpress Inventory Management								
Products	Products by Supplier Suppliers	Sales Rep	Purchase Orders	Gift	Card	Rain Check	Packages	Modifier			
Sear	rch & Gift Card List		1 11		Card I	nformation		1			
Gift Card:		Go	Card Card Number:	7777	777777			Change Code			
Card Status:	Open 🗾		Holder Name:	Test	, Custome	er					
			Amount:	-	\$50.00						
Code	Holder		Amount.	1	\$50.00	Card His	tory				
977231	Pin Shot	- 11	Current Balance:		\$50.00	- E					
977232	Pin Shot	- 11		1							
977233	Pin Shot	_									
977234	Pin Shot		Update gift card								
977235	Pin Shot	_									
977236 977237	Pin Shot Pin Shot	_	Card Details								
977238	Pin Shot	_	Created Date:		8/7/200	9					
977239	Pin Shot		Contra Concercione de la concerción		1						
977240	Pin Shot		Last Updated	Date:	8/7/200	9					
977241	Pin Shot										
977242	Pin Shot				🗖 Discor	ntinued?					
977243	Pin Shot										
977244	Pin Shot				-						
977245	Pin Shot		Expired Date:		1/ 1/2	099 🗾					
977246	Pin Shot										
977247	1st Place										
977248	1st Place										
977249	1st Place										
977250	1st Place										
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186-187				-	Disa	Reset	-				

Resetting a Gift Card

After the value of a card has been completely redeemed, or the card has expired, it can be reset. Resetting the card means that the information that was associated with the card, the holder name, the expiration date and any amount that may be left on it, will be erased. This allows the user to reuse the gift card. Each time a card is fully redeemed or expires, it is suggested that the card be reset and used again.

To reset a gift card, first locate the gift card in the *Search & Gift Card List*. Next, select *Reset Gift Card*. See example below. This will erase any information associated with that card and allow the card to be issued again.

In the Report module of POSExpress, there are various Gift Card reports. Resetting a gift card *will not* remove the history of the gift card from the Gift Card History Report. The user is still able to see the entire life history of the gift card by using this report.

Search & Gift Card List Card Information	Inve	entory	PO	Sexpress Invent	ory M	anageme	ent		>
Gift Card: Go Card Status: All Code Holder 1111 Test, Customer 11111 Test, Customer 11111 Test, Customer 1111 Test, Customer 1111 Test, Customer 1111 Test, Customer 1111 Test, Customer 1106-000014 Southwoods Surgery Centt 1106-000015 Southwoods Surgery Centt 1106-00019 Southwoods Surgery Centt 1106-00020 Southwoods Surgery Centt 1106-00022 Southwoods Surgery Centt 1106-00024 Southwoods Surgery Centt 1106-00025 Southwoods Surgery Centt 1106-00024 Southwoods Surgery Centt 1106-00025 Southwoods Surgery Centt 1106-00026 Southwoods Surgery Centt 1106-00028 Southwoods Surgery Centt 1106-00028 Southwoods Surgery Centt 1106-000028 Southwoods Surgery Centt 1106-000029 Southwoods Surgery Centt 1106-000031 Southwoods Surgery Centt 1106-000032 Southwoods Surgery Centt			Sales Rep		Gift Ca	rd R	ain Check	Packages	Modifier
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Recalc Gift Card New Enable Reset							Reset		

Disabling / Enabling a Gift Card

POSExpress allows the user to disable a gift card. This may be done if a valued customer reports that a card is missing or stolen. If that card is recovered, it can then be enabled.

To disable a gift card, enter the *Gift Card* tab in the *Inventory* module. Use the search filter to locate the gift card that will be disabled. Once located, select the card from the *Search & Gift Card List*, and select *Disable Card*. This will disable the card from being used. It will not delete it from the system.

To view the disabled card, select *Discontinued* from the *Card Status* drop down menu in the *Search & Gift Card List*. To enable the gift card again, select the card in the *Search & Gift Card List* and select the *Enable Card* button. The *Enable Card* button will take the place of the *Disable Card* button when viewing discontinued cards.

Inv	rentory	PC	Sexpress Inve	ntory i	Manager	nent		2
Products	Products by Supplie	rs Sales Rep	Purchase Orders	Gift	Card	Rain Check	Packages	Modifier
Sear	ch & Gift Card List		a 1)		Card I	nformation		1
Gift Card:	men 🔹	Go	Card Card Number:	_	111111			Change Code
Card Status: O	ipen 🗾		Holder Name:	Test,	Custome	r		
Code	Holder		Amount:		\$50.00	Card His	tory	
1	tom anness		Current Balance:		\$50.00			
1111111111	Test, Customer		Current Balance.	1	\$50.00			
1106-000014	Southwoods Surger							
1106-000015	Southwoods Surger		Update gift card					
1106-000016	Southwoods Surger							
1106-000017	Southwoods Surger		Card Details					
1106-000018	Southwoods Surger		Created Date:		8/7/2009	2		
1106-000019	Southwoods Surger		orodiou pato.		10/7/2009			
1106-000020	Southwoods Surger		Last Updated	Date:	8/7/2009	19		
1106-000021	Southwoods Surger		cost opastoa	Dato.	10/172005			
1106-000022	Southwoods Surger				☐ Discon	tinued?		
1106-000023	Southwoods Surger							
1106-000024	Southwoods Surger				1			
1106-000025	Southwoods Surger		Expired Date:		1/ 1/20	99 🔻		
1106-000026	Southwoods Surger				1 -1 -1 -1	_		
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1106-000029	Southwoods Surger							
1106-000030	Southwoods Surger							
1106-000031	Southwoods Surger							
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<1105-000034 <	Contributede Curson							
	Recalc Gif	Card	Cancel	Save	Disab	le Reset		EXIT >

View Gift Card History

To view the history of a gift card, including initializations, redemptions, deletions and any other transactions, use the Gift Card History feature. Enter the *Gift Card* tab under the *Inventory* module, and locate the gift card in the *Search & Gift Card List*.

Select the *Card History* button and the *Gift Card History* window will appear. This will display the card holder name, number, balance, and a list of transactions for the card. To view a specific transaction in the list, select *View*. This will open a Sale Look Up window that contains all information related to that specific transaction.

	nventory				POSexpress I	nventa	ory Manag	ement			
Products	Products by Supplier	Su	ppliers	Sales	Rep Purchase Orders		Gift Card	Rain Che	eck .	Packages	Modifier
Se	arch & Gift (Card L	ist				Car	d Inform	ation		
Gift Card:			Go		Card Card Num	ber: 17	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	,			Change Code
Card Status:	Open		-		Holder Nar	me: T	est, Custor	ner			
Code	Holder				Amo	ount: [\$50.0	DO Car	d History		
L	tom ann	ness									
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106-000002	Ferrant	GIII	Card His	story							×
106-000003	Ferrant										
106-000004	Ferrant	Card	Number:	777	7777777			Current Ba	lance:	\$50.00	
106-000006									4		
106-000010		Card	Holder Nam	ne: Test	;, Customer						
106-000011		Notes									
106-000012			•	8							
106-000013		Gift Ca	rd History								
106-000014 106-000015											
106-000015	Southw		Dat		Description	1 Lin	lder Name	Amount	Balance	View	
106-000018				100							
106-000017			8/7/2009 1	.2:47 PM	Initialize New	Test	, Customer	\$50.00	\$50.00	View	
106-000019			8/7/2009	1:04 PM	Redeemed Gift Card	1 Test	, Customer	\$22.42	\$27.58	View	
106-000020			0,7,2005	1.01111	riodoomod one odre		, ouscomer	PLLITL			
106-000021	Southy		8/7/2009	1:09 PM	Deleted Card	Test	, Customer	\$0.00	\$0.00	View	
106-000022	Southw					-					
106-000023			8/7/2009	1:49 PM	Initialize New	Test	, Customer	\$50.00	\$50.00	View	
106-000024	Southw		8/7/2009	1.52 DM	Redeemed Gift Card	1 Tost	. Customer	\$7.47	\$42.53	View	
106-000025	Southw		0,7,2009	1.02 PM	Reaconida olicidare	1050	, cascomer	47.77			
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Inventory Modifiers

Creating a Modifier

To create general modifiers for items, (ex: extra cheese, meat temperature, etc). Navigate to the Inventory Module and select the Modifier button at the top of the screen.

I	nventory		PO	Sexpress Inve	ntory Manag	ement		
Products	Products by Supplier	Suppliers	Sales Rep	Purchase Orders	Gift Card	Rain Check	Packages	Modifier
S	Search & Modifi	er List			Mo	difier Details		
Search: F&B Modifier Tex		uct • All	Mc	Modifier Text: Modifier Type: difier Item Type: Help Text: :r Choices	Multiple Choice F&B	difier (Recipe)	Force an ansv	A Wer
				ice Text Indicator for inact	ve item	Choice Type	Charge To Ite	m (*)

In the following example, a Modifier for temperature, rare – well, will be created.

In the *Modifier Text* field, enter the name of the Modifier that is being created. Example: Temperature.

- The *Modifier Type* drop down menu contains the 5 different types of modifiers to choose from:
 - *Multiple Choice* selects **only one** choice from the list provided (ex: temperature or salad dressing)
 - This is the choice we would use for our example, because a piece of meat can only be one temperature.
 - Drop Down selects only one from drop down list provided

- *Check List* selects **multiple** from list provided (ex: no tomato, no onion, no lettuce, etc.)
- *Text* requires the user to type in instruction (ex: special requests)
- *Pizza Toppings* creates list of toppings that can be applied to each side of a pizza, the whole pizza and/or extra toppings
- The *Modifier Item Type* drop down menu is where it is determined if the modifier is associated with a Food & Beverage item (F&B) or a Product (Basic Inventory).
- The *Help Text* field is displayed within the Modifier dialogue box when the modifier is displayed on the Sales screen. It will be used to clarify what the modifier is used for, etc.
- *Invisible Modifier* (Recipe) will not show the modifier when the item is selected on the sales screen. This feature is used to create recipes for kitchen staff.
- *Force an answer* requires the user to select an answer to continue moving forward with the order.

Modifier Te	xt: Temperature	*	
Modifier Type:	Multiple Choice	Deplete Inventory Only	
Modifier Item Type:	F&B 💌	Roll up Price	
Help Text:	Please Select A Preferred Temperature	Cooking	
🗆 Invisible Modifier (Recip	oe) 🔽 Force an an	swer 🗌 Meat Temp	
Maximum # of Answer	s	Show Modifier: Both	
-Assign to Category	76		
Category:	7	Assign Unassign	

Example of a Modifier for Temperature:

Adding Choices to a Modifier

Modifier Choices are the choices that will be displayed to the server as part of a specific Modifier. For Example, if a Modifier for temperature is created, the choices may be: Rare, Medium Rare, Medium, Medium Well and Well Done. This next section will provide instruction for creating Modifier Choices.

I	nventory			Prophet Systems Inventory Management								
Products	Products by Supplier	Suppliers	Sales Rep	Purchase Orders	Gift Card	Rain Check	Packages	Modifier Setup	PO Builder Wizard			
S	earch & Modif	ier List				М	odifier Details	1				
Search:		Go		Modifier T	ext: Temperat	ure		*				
C F&B	🔘 Prod	luct 💿 All		Modifier Type:	Multiple Choice	e • F	Deplete Invento	ory Only				
Modifier Text			Mo	difier Item Type:	F&B	- E	Roll up Price					
Dressing Pizza Topping	IS			Help Text:	Please Select Temperature	A Preferred Cool	king	*				
			□ Invis	ible Modifier (Rec		Force an answe	r 🗆 Meat Te					
				mum # of Answe			v Modifier: Bot	-				
			Assign	to Category	10-							
				Category:		<u> </u>	Assign Ur	nassign				
			Madifia	r Choices								
			Modifie	r Choices								
			Cho	ice Text		Choice Type	Charge To Iter	n				
								-				
				Indicator for inacti	ve item		(Add Choice	Remove	Choice(s)		
			Nev			1						

- Select the *Add Choice* button located at the bottom of the Modifier page.
- A dialogue box will appear. Enter a choice for the specific modifier in the *Choice Text* field. In the example provided below, "rare" was used.
- Select the *Choice Type* drop down to assign what type of choice will be used for this modifier. "Text" will be most commonly used.
- The *Charge Item Code* drop down menu enables the user to select a product code from the current inventory list and add that item to

the order. This item, and any applicable price, will be added to the price of the order.

- For example, if an item called "American Cheese" exists in inventory with an item code of "AMCH" and a price 50 cents, selecting AMCH in this field will charge 50 cents when this modifier is selected.
- Select *Default* to attach this item to the modifier automatically.
 - Example: If no meat temperature is requested, "medium" will be selected by default.
- Select *Active* to include this choice as an available option within the Modifier. If this option is unchecked, the choice will be removed from the list of choices within the Modifier.
- Once completed, select *Save*.

	Item Modifier	×
Choice Text:	Rare	*
Choice Type: Charge Item Code:	Text Clear	
Delete	 □ Default □ Show Modifier Online □ Show Other Text □ Active □ Show Recommend Recommend Text: □ Show Popup On Web 	*
BG Color: F	ont Color: Save	Cancel

	Item Modifier	×
Choice Text:	Medium	^
Choice Type: Charge Item Code:	Text Clear	
Delete	 ✓ Default ✓ Show Modifier Online ✓ Show Other Text ✓ Active ✓ Show Recommend Recommend Text: ✓ Show Popup On Web 	*
BG Color: F	ont Color: Save	Cancel

After all the choices are entered, the Modifier Choices box will look like this:

Choice Text	Choice Type	Charge To Item	
Rare	Text		
Medium Rare	Text		
Medium	Text		
Medium Well	Text		
Well	Text		

Note: The order of the modifiers can be changed by simply selecting the modifier you want to move, and then selecting the arrows to on the right, to move the choice up and down accordingly.

Select *Save* at the bottom of the screen, the Modifier appears in the Modifier list.

Pab Product All ressing image: semperature image: semperature			Go
ressing zza Toppings	FBB	Product	• All
zza Toppings	odifier Text		
	essing zza Toppings		

Linking a Modifier to an Inventory Item

After creating Modifiers, the Modifiers must then be linked to the associated inventory item. This link is what causes the Modifier to be displayed on the Sales screen when the inventory item is selected. This link is completed in the Inventory Module.

First, Select the Inventory module from the main screen. **The Search & Product List** will be displayed. Scroll or search through the list of products and select an item that will use a modifier. In the Example below, the product Hamburger, product code LHAMBRGR, is chosen. Once that product is selected, choose that specific item's Modifier tab.

_	OSExpress - [Inven			6										
File	View Tools (p						1				
Sales	-	invent	огу			Prophe	t Systen	ns Inven	tory Mai	nageme	ent	\sim		
	Products	Produc		Suppliers	Sales Rep	Purcha Order		Gift Card	Rain C	heck	Packages	Modifier Setu	PO Builder Wizard	
Inventory	S	Search &	Produ	ct List						Produc	ct Informati	on	2	
Customer	Product:			Go	Product Setu	p Order In	fo Tier P	Price Ad	vanced	Other	Item Modifiers	Notes	2	
omer	Supp	lier		Category	I	tem Type:	Product		•					
H	[All]		· [All]		-	Supplier:	Food		-					
Report	🔲 Sort by age	💿 Asc 🛛 💿		Show All		Category:	Food		•					
×.	Show Discontin				Bro	luct Code:	LHAMBRGR	,		Change (Code			
F	Exclude Not In	an a		22 iter			Hamburger							
Time Keeper StarterHut v3	Code 0011		Descript		-	alog Cost:		\$0.00				Delete		
sper	0012		Pizza			-						Delete		
Star	0013		Hot Dog	1		Tax Code:		lot 💌						
ler H	0014		Salad Pepsi		Tax Inc	lusive Price:								
3	0016		Red Bull		R	etail Price:	\$:	10.00						
	0017		Bud Ligh											
	ADMINCHARO BankReject	it	Admin C ACH Rej		Tanala	Inventory:	Yes							
	CARTFEEAUC	TION	Special		Track	inventory:	l							
	DeclareCash			Cash Tips										
	DEPOSITFEE		Deposit Entranc											
	LATERETURN													
	OnlineHandlin			ore Handling Fe										
	OnlineInterS			ore Internationa.			Month(s)	First Rec	eive Date	10	/9/2014	Rental		
	OnlineShippir RENTALCHAR		Rental C	ore Shipping Item		1 -				1				
	SERVICECHA		Gratuity		-									
	SURCHARGE		Surchar	ge	1									
	TeeSheetRai			et Rain Check	<u> </u>									
	LHAMBRGR	TION	Hambur											
				-										
					Clone Iter	n								
					Cost Deta	ii ———								
					Ave Cost	1	\$0.00 Uni	its in stock	0					
					Last Cost		\$0.00 Uni	its on orde	r 0					
					New					Receiv	e Print Prio		Sale	
					Product	Cance	el Sa	ave Di	scontinue	Produc		e Physical Inventory	Category	EXIT
	-		_											
	Ready													
1														

Inven	tory			Prophet S	ystems Inv	entory l	Manageme	int		
	icts by plier	Suppliers	Sales Rep	Purchase Orders	Gift Care	i Ra	in Check	Packages	Modifier Setup	PO Builder Wizard
Search 8	Product	List					Produc	t Informatio	on	
Product:		Go	Product Setup	Order Info	Tier Price	Advanced	Other	Item Modifiers	Notes	
Supplier		Category							Add	
All]	▼ [All]		 Modifier: 	I				<u> </u>	Modifier	
Sort by age • Asc • Show Discontinued Items Exclude Not In Stock	Desc	Show All		Modifier Text			Modifier Type		Delete Modifier	
Code	Description	58911841								
0011	Chicken		-							
0012	Pizza							-		
0013	Hot Dog			1						
0014	Salad			Choice Text			Choice Type	In	dicator for inactive ite	m
0015	Pepsi		Choice:							
0016	Red Bull									
0017	Bud Light									
ADMINCHARGE	Admin Cha	rge								
BankReject	ACH Rejec			1						
CARTFEEAUCTION	Special Ca									
DeclareCashTips	Declare Ca								Preview	
DEPOSITFEE	Deposit Fe									
INTRANCEFEE	Entrance F									
ATERETURNCHARGE										
OnlineHandlingFeeI		Handling Fe								
OnlineInterShipping	Web Store	Internationa								
OnlineShippingItem	Web Store	Shipping Item								
RENTALCHARGE	Rental Cha	arge								
SERVICECHARGE	Gratuity									
SURCHARGE	Surcharge									
FeeSheetRainCheck		Rain Check								
TEETIMEAUCTION	Special Te									
HAMBRGR	Hamburger									
						_				
			6-4 P · · ·							
			Cost Detai							
			Ave Cost	\$0.0	0 Units in st	ock 0				
						0000				
			Last Cost	\$0.0	0 Units on c	rder 0				
				7				1	7	
			New	1.00		Discontin	Receiv	e Print Pric	e Physical Inventory (Sale
			Product	Cancel	Save		Produc	t Tags		Category

This will open the Modifier screen, pictured below:

Product Setup	Order Info	Tier Price	Advanced	Other	Item Modif	iers Notes
Modifier:	Temperatu	ire			<u>_1</u>	Add Modifier
2	Modifier Text		1	Modifier Type		Delete
<u>3</u>	Temperature			Multiple Choice	e 🚺	Modifier
Choice:	Choice Text			Choice Type		Indicator for inactive ite
Choice:	Rare			Text	E	
4	Medium Rare Medium			Text Text		
<u> </u>	Medium Well			Text		
	Well			Text	*	

For more detail, select the Modifier drop down box, pictured below:

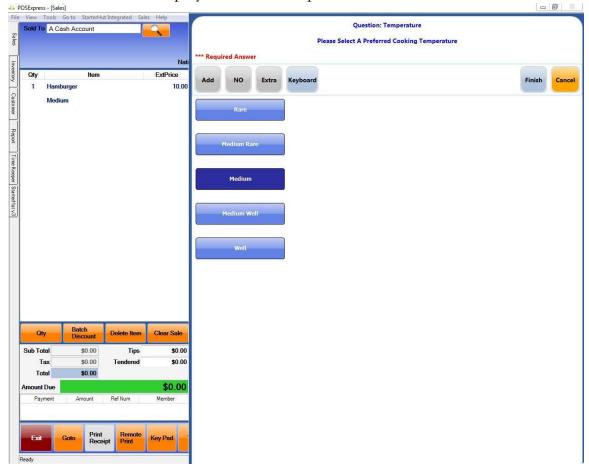
- The Modifier drop down box will contain a list of all the Modifiers that have been created. Select the desired Modifier for this item (**#1 above**). The Temperature Modifier was selected for the Hamburger item.
- After selecting the desired Modifier, select *Add Modifier* (#2 above) and the selection will be placed in the *Modifier Text* box (#3 above).
- The choices associated with the Modifier can be previewed by selecting the Modifier that is displayed in the *Modifier Text* box. The choices for that specific Modifier will appear in the *Choice Text* box (#4 above).
- Select *Save* at the bottom of the screen to save the changes made.

There may be an instance when more than one modifier is needed for a desired product. For Example, a hamburger may have a temperature modifier and a sandwich options modifier. To accomplish this, simply repeat the steps and add the additional modifiers. You can change the display order of the Modifiers on the Sales screen by selecting the *Modifier Text* and moving it up or down using the arrow buttons.

Using the Modifiers During a Sales Transaction

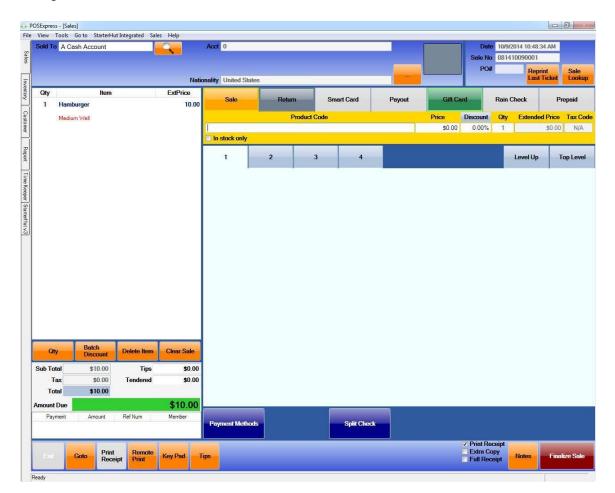
After creating and saving the Modifiers, exit the Inventory Module and navigate to the Sales screen.

Select an inventory item that has a Modifier linked to it. Once selected, the Modifier screen will display. See the example below:



- Note: In this example, Medium was assigned as the default choice thus, it is dark blue. If a default had not been set, all choices would be light blue.
- Note: Because *Force an answer* was selected when creating the Temperature Modifier, "***Required Answer" appears within Modifier dialogue box. If that option was not selected, the user would have the ability to select "Next" and move forward without selecting a choice.

After a choice is selected, the Modifier dialogue box will disappear and the Modifiers choices will appear beneath the selected inventory item in a red font. In the example below, "Medium Well" was the selected choice of the Temperature Modifier.



• Note: If more than one Modifier is assigned to a product, select "Next" to move to the next Modifier and its options.

Remote Printing

We can set up remote printing 2 ways either by Sales Category or per item at the item level

To setup remote printing by Sales Category, you will need to go to Tools/Options/Reference Tables/Sales Categories. Select the Remote Printing tab on each sale category you wish to print and pick the correct printer to add.

		Sale			ſ		Search from current view	Sea
General Options Global Options Handheld Options	ID: Description:	24 Food	(e.g.	C Display G Accessories, Carts)	eneral Ledger Code			
Handicap Hardware/Receipt	Department:	Service	-	COGS GL:		-	•	
Inventory Options Kiosk Options	General Ledger	Code:		Inventory GL:		-	•	
Reference Tables Block Item Category	Group Type:	Food and Beverage	•	Ranking:	1 ÷]		
Calendar					Itemizer Descript		-	
- Color Code - Company					<u></u>	•	·	
Coupon					Statement Displa	- Cole Disco Dive	-	
Currency Exchange Rate Customer Class			Commission		Location	-	·]	
- Customer Group	Prepaid Back:	0.000%						
 Customer Loyalty Program Customer Occupations 	C Zip Code Trac	cking		🗆 Age Verific	12/12/2012 A	_		
- Customer Preference	Force Tax ov			Line on Receipt	18 🚊	3		
- Customer Student Status	Force Full Re	ceipt	Varning when you	discount below catalo	g Cost			
- Customer Suffix Name - Customer Title Name	General Price S	etting Remote Printing						
Customer Litle Name		and a rectifice i mining						
			/					
- Customer Type								
- Customer Type - Department								a 1
– Customer Type – Department – Discount Button Setup	Printer Name:						• A	dd
Customer Type Department Discount Button Setup Discount Reason	and the second second second	e Print by Period					• _A	dd
- Customer Type - Department - Discount Button Setup - Discount Reason - Discount Tee Time	E Set Remot			nd of Times (ra).			- A	dd
- Customer Type - Department Discount Button Setup - Discount Reason - Discount Tee Time - FB Web Order ZipCode	E Set Remot	e Print by Period	✓ AM ✓ Er	nd of Time: 12 💌	0 • AM •		- A	dd
- Customer Type - Department - Discount Button Setup - Discount Reason - Discount Tee Time	E Set Remot						• _ A	dd
- Customer Type - Department Discount Button Setup - Discount Reason - Discount Tee Time - FB Web Order ZipCode - Gratuity - Item Kits	E Set Remot			nd of Time: 12 💌 :	0 T AM T		A	dd
- Customer Type - Department - Discount Button Setup - Discount Reason - Discount Tee Time - FB web Order ZipCode - Gratuity - Item Kits - Location Code	E Set Remot						A	dd
Customer Type Department Discount Button Setup Discount Reason Discount Tee Time FB Web Order ZipCode Gratuity Item Kits Location Code Lost Opportunity Reason	E Set Remot						<u> </u>	dd
Customer Type Department Discount Button Setup Discount Reason Discount Tee Time FB Web Order ZipCode Gratuity Item Kits Location Code Lost Opportunity Reason Mobile Carrier	E Set Remot						<u> </u>	dd
Customer Type Department Discount Button Setup Discount Reason Discount Tee Time FB web Order ZipCode Gratuity Item Kits Location Code Lost Opportunity Reason Mobile Carrier Nationality Information	E Set Remot						<u> </u>	dd
- Customer Type - Department - Discount Button Setup - Discount Reason - Discount Tee Time - FB Web Order ZipCode - Gratuity - Trem Kits - Lost Opportunity Reason - Mobile Carrier - Nationality Information - Payout Description	E Set Remot						× A	dd
Customer Type Department Discount Button Setup Discount Reason Discount Tee Time FB Web Order ZipCode Gratuity Item Kits Location Code Lost Opportunity Reason Mobile Carrier Nationality Information Payout Description PMS Itemizer	E Set Remot						<u> </u>	dd
Customer Type Department Discount Button Setup Discount Reason Discount Tee Time FB Web Order ZipCode Gratuity Item Kits Location Code Lost Opportunity Reason Mobile Carrier Nationality Information Payout Description PMS Itemizer Profit Center	E Set Remot						× _ A	dd
- Customer Type - Department Discount Button Setup Discount Reason - FB Web Order ZipCode - Gratuity - Item Kits - Location Code - Lost Opportunity Reason - Mobile Carrier - Nationality Information - Payout Description - PMS Itemizer - Profit Center - Sales Category	E Set Remot						A	dd
Customer Type Department Discount Button Setup Discount Reason Discount Tee Time FB Web Order ZipCode Gratuity Item Kits Location Code Lost Opportunity Reason Mobile Carrier Nationality Information Payout Description PMS Itemizer Profit Center Sales Referrals	E Set Remot						<u> </u>	dd
- Customer Type - Department - Discount Button Setup - Discount Reason - Discount Tee Time - FB Web Order ZipCode - Gratuity - Trem Kits - Lost Opportunity Reason - Mobile Carrier - Nationality Information - Payout Description - PMS Itemizer - Profit Center - Sales Category - Sales Referrals - Sales Referrals	E Set Remot						<u> </u>	dd
Customer Type Department Discount Button Setup Discount Reason Discount Tee Time FB Web Order ZipCode Gratuity Item Kits Location Code Lost Opportunity Reason Mobile Carrier Nationality Information Payout Description PMS Itemizer Profit Center Sales Referrals	E Set Remot						× _ A	dd
- Customer Type - Department - Discount Button Setup - Discount Reason - Discount Tee Time - FB Web Order ZipCode - Gratuity - Trem Kits - Lost Opportunity Reason - Mobile Carrier - Nationality Information - Payout Description - PMS Itemizer - Profit Center - Sales Category - Sales Referrals - Sales Referrals	E Set Remot						× _ A	dd
- Customer Type - Department - Discount Button Setup - Discount Reason - Discount Tee Time - FB Web Order ZipCode - Gratuity - Item Kits - Lost Opportunity Reason - Mobile Carrier - Nationality Information - Payout Description - PMS Itemizer - Profit Center - Sales Category - Sales Category - Sales Sererals - Sales Types - Season Code - Tax	E Set Remot						y <u>A</u>	dd
Customer Type Department Discount Reason Discount Reason FB Web Order ZipCode Gratuity Item Kits Location Code Lost Opportunity Reason Mobile Carrier Nationality Information PAyout Description PMS Itemizer Profit Center Sales Category Sales Referrals Sales Referrals Sales Category Sales Referrals Sales Category Sales Season Code Tax Terminal Group	E Set Remot						× A	
Customer Type Department Discount Button Setup Discount Reason Discourt Tee Time FB Web Order ZipCode Cratuity Item Kits Location Code Lost Opportunity Reason Mobile Carrier Nationality Information Payout Description PMS Itemizer Profit Center Sales Category Sales Referrals Sales Types Season Code Tax Terminal Group	E Set Remot							
- Customer Type - Department Discount Reason Discount Tee Time - FB Web Order ZipCode - Gratuity Tem Kits - Lost Opportunity Reason - Mobile Carrier - Nationality Information - Payout Description - PMS Itemizer - Profit Center - Sales Category - Sales Referrals - Sales Category - Sales Referrals - Sales Category - Sales Referrals - Sales Category - S	E Set Remot							
Customer Type Department Discount Reason Discount Reason FB Web Order ZipCode Gratuity Item Kits Location Code Lost Opportunity Reason Mobile Carrier Nationality Information Payout Description PMS Itemizer Profit Center Sales Category Sales Referrals Sales Referrals Sales Referrals Sales Referrals Sales Code Tax Terminal Group Terminal Information Web Store Departments Report Options	E Set Remot	of Time: 12 r 10						
- Customer Type - Department - Discount Button Setup - Discount Reason - Discount Tee Time - FB Web Order ZipCode - Gratuity - Item Kits - Lost Opportunity Reason - Mobile Carrier - Nationality Information - Payout Description - PMS Itemizer - Profit Center - Sales Category - Sales Referrals - Sales Types - Season Code - Tax - Terminal Group - Terminal Information - Web Store Departments - Report Options - Sales Category - Sales Otopions - Sales Otopions - Terminal Information - Web Store Departments - Report Options - Sales Options	E Set Remot							
- Customer Type - Department - Discount Button Setup - Discount Reason - Discount Tee Time - FB Web Order ZipCode - Gratuity - Item Kits - Location Code - Lost Opportunity Reason - Mobile Carrier - Nationality Information - Payout Description - PMS Itemizer - Profit Center - Sales Referrals - Sales Types - Sales Types - Season Code - Tax - Terminal Group - Terminal Information	E Set Remot	of Time: 12 r 10						
- Customer Type - Department Discount Reason Discount Reason - Discount Tee Time - FB Web Order ZipCode - Gratuity - Item Kits - Lost Opportunity Reason - Mobile Carrier - Nationality Information - Payout Description - PMS Itemizer - Profit Center - Sales Category - Sales Category - Sales Referrols - Sales Types - Season Code - Tax - Terminal Group - Terminal Information - Web Store Departments - Report Options - Sales O	E Set Remot Start - Printer Name Save C	of Time: 12 r 10						

To setup remote printing at the item level, you will go into Inventory and find the item. On the Advanced Tab you will select 'Use Remote Printer at Item Level'

Once this is saved, you will see the Remote Printer tab appear. You can set these items up on this tab to go to the correct printer

Inven	tory		Prophet S	ystems Inve	ntory Ma	anageme	ent				
	ucts by Suppliers	Sales Rep	Purchase Orders	Gift Card	Rain	Check	Packages	Modifier Setu		Builder /izard	
Search 8	& Product List					Produc	t Informat	ion			
Product:	Go	Product Setup	Order Info	Tier Price A	Advanced	Other	Item Modifiers	Notes	Remote Printer		
Supplier	Category					Discor	ntinue				
[All]	- [All]	-				□ Player		Reference	Number F	Prompt	
Sort by age • Asc	Desc					□ Receipt					
Show Discontinued Items	Show All	Item De	eposit:			State of the second second					
Exclude Not In Stock				Force Deposit		Full Re	•				
	24 ib	Item Kit			-	Print Ti					
Code	Description	_	-			T Manual	Description				
0011 0012	Chicken	Ticket T	ype: 10	Caddie	Ŧ	□ Manual	Price	Cal Qty By	Manual P	rice	
0012	Pizza Hot Dog	🗆 🗆 Loyal	ty Points			□ Always	Negative	F Pic Display			
0013	Salad	E Enabl	e to customize	item on Sale		I Amays	Negative			Jer cent	
0015	Pepsi			leent on bale	-	and the second se		F Third Decin	nal Retail		
0016	Red Bull		prompt Qty		C	I Use Re	mote Printer	at Item Level			
0017	Bud Light	T Item	count down	0		1 Addore					
ADMINCHARGE	Admin Charge					Require	a the Head Of	fice Password w	hen sellir	ng item belo	w catalog
BankReject	ACH Rejection	_				cost				2	-
CARTFEEAUCTION DeclareCashTips	Special Cart Declare Cash Tips	-				Track (Custom Data	Force Full F	Receipt		
DEPOSITFEE	Deposit Fee	C Overi	de Earning Loy	alty Points)						
ENTRANCEFEE	Entrance Fee			en for a constant de la							
LATERETURNCHARGE	Late return charge	Minimur	n Selling Price								
LHAMBRGR	Hamburger	Max Di	sc:	% OR	Min Price						
OnlineHandlingFeeI											
OnlineInterShipping OnlineShippingItem	Web Store Internationa Web Store Shipping Ite										
RENTALCHARGE	Rental Charge	• Tier	Price	C Tier Price by	/ Time	CM	arkdown	0.00 %			
SCGL5	Golf Lessons - 5										
SERVICECHARGE	Gratuity										
SURCHARGE	Surcharge										
TeeSheetRainCheck	Tee Sheet Rain Check										
TEETIMEAUCTION	Special Tee Time	_									
		_									
		Cost Deta	ail								
		Ave Cost	\$0.0	0 Units in stoc	ск -3						
		Last Cost	\$0.0	0 Units on ord	tor 0						
		Last COSt	\$0.0	onics on ord	ici la						
		New	Cancel	Save	Discontinue	Receiv	ve Print Pri	ce Physical	Sale		E

Smart Cards

POSExpress Smart Cards are electronic or virtual "cards" that are related to specific inventory items and are issued to individual customers for the purpose of tracking and counting the usage of that specific item. Typically, Smart Card inventory items are bundles or packages of an item that are presold at a discount. A common example would be "Get 5 for the price of 4" or "Buy 4 get 1 free". POSExpress allows the user to create an inventory item that will sell 6 pieces for the price of 5 and then have the ability to track the usage and redemption of each of the 6 pieces.

Creating a Smart Card Inventory Item

To create a Smart Card item, go to the *Inventory* module and select *New Product*. From the *Item Type* drop down menu, select *Smart Card*. Complete the remaining fields accordingly. Keep in mind that in this example of "buy 4 get 1 free", the retail price would be the price for 4 lessons. In the example below, "Golf Lessons – 5" was created.

i.e	nventory			Prophet Sy	vstems Inven	tory Managem	ent		
Products	Products by Supplier	Suppliers	Sales Rep	Purchase Orders	Gift Card	Rain Check	Packages	Modifier Setup	PO Builder Wizard
S	earch & Produ	ct List				Creat	e New Prod	uct	
Product:		Go	Product Set	up Order Info	Tier Price Ad	vanced Other	Item Modifiers	Notes Sr	nart Card
Suppl	ier	Category		Item Type: Sma	art Card	-		, ,	
A li]	▼ [All]		.	Supplier : Drin	k	-			
	💿 Asc 🐡 Desc	Show All		Category: Serv	vice Charge	•			
Show Discontin Exclude Not In			Pro	duct Code: SCG	L5				
Code	Descrip			Description: Golf	Lessons - 5				
CGL5	Golf Les	isons - 5	Ca	talog Cost:	0.00			Delete	
				Tax Code: N/A	Not 💌				
				clusive Price:	\$100.00				
			-	Retail Price:	\$100.00				
			Track	Inventory:	No				
			_	·					
			AgingVi Added		th(s) First Rece	ive Date		Rental	
			Added	I MON	un(s) Filst Rece	ave Date		Rental	
			-						
			Clone Ite	m					
			Cost Det	ail					
			Ave Cost	\$0.00	Units in stock	0			
			Last Cost	\$0.00	Units on orde	r 0			
				\$0.00	Units on orde	Rece	ive Print Pri	ce Physical	Sale

After the item is created, select the *Smart Card* tab. In the *Smart Card Qty* field, enter the total quantity that will be assigned to this Smart Card and select *Save*.

In the example below, 5 was entered because the product that was created is a bundle of 5 golf lessons. Remember, the price entered in the previous step was the price for 4 lessons. This is how the customer will receive 5 of these items for the price of 4.

	nventory			Prophet Sy	vstems Inve	ntory Managem	ent		
Products	Products by Supplier	Suppliers	Sales Rep	Purchase Orders	Gift Card	Rain Check	Packages	Modifier Setup	PO Builder Wizard
S	earch & Produ	ict List				Creat	e New Produ	ıct	
roduct:		Go	Product Setup	Order Info	Tier Price A	dvanced Other	Item Modifiers	Notes Sma	rt Card
Suppl	ier	Category	Smart	ard Qty: 5			1		A
11]	▼ [All]		-	em date range				4	r
	💿 Asc 🕐 Desc	Show All		n date : 10/ 9	9/2014 - T	o date : 10/ 9/2	015 🔻		
Show Discontin Exclude Not In :									
ode	Descrip	tion							
CGL5		ssons - 5							
			_						
			_						
			Cost Deta						
			Cost Deta Ave Cost	sil \$0.0					
				\$0.0					

Issuing a Smart Card

Once the Smart Card is created, it can now be sold to an individual customer. <u>Keep in mind, Smart Cards must be sold to a specific customer and cannot be</u> <u>sold to A Cash Account</u>. To issue a Smart Card, go to the <u>Sales</u> module and enter a specific customer in the <u>Sold To</u> field. Select the <u>Smart Card</u> tab. This will disable any QuickSale Buttons that are not associated to Smart Card inventory items. Smart Cards can also be assigned to a QuickSale Button. Please refer to the QuickSale Buttons guide for instruction.

Enter the product code of the Smart Card item by either selecting the assigned QuickSale Button or by entering the product code in the *Product Code* field. Select *Finalize Sale*. This will assign the Smart Card quantity that was given to this product to the specific customer. In the example below, Test Customer has purchased 5 golf lessons for the price of 4. The 5 lessons have been assigned to the Test Customer account and can be seen on the Customer module.

	OSExpress			(internation)	and a second	-													a ×
4.4				Hut Integrated	Sales Help														- 8 ×
ŝ		James, Let			<u> </u>	Acct						1	Smart Card			-	2014 11:07:0	5 AM	
Sales	Balance	\$0.00	Credit	\$0.00			Class I Mer	nber					Calu			0814	10090001	_	_
		_				Class					¥				PO#		Repri	nt	Sale Lookup
Inver	Expire		Prepaid	\$0.00		onality	United Stat	es		10	-	_					Last	ICKEL	соокар
Inventory Customer Report	Qty		Item		ExtPrice	_	Sale		Return		Smart Card	Pay	On Account	Gift Ca	Ird	Rain (Check	Pr	epaid
T	1	Golf Lesson	s-5		100.00	_				C		/				an a			
ustor							-		Prod	uct Code				Price	Discount	Qty	Extended		Tax Code
ner						scgl								\$0.00	0.00%	1		\$0.00	N/A
						III IN	stock only					_						_	
epor							1	2		3	4	- 1					Level Up	T	op Level
Ĩ							0.04	194		2007									•
le Ke																			
eper																			
Sta																			
rterH																			
Time Keeper StarterHut v3																			
	Qty	Bal	count	Delete Item	Clear Sale														
	Sub Tot		00.00	Tips	\$0.00														
	Ta	ax	\$0.00	Tendered	\$0.00														
	Tot	al \$1	00.00																
	Amount	Due			\$100.00			_					_						
	Рауп	nent A	mount	Ref Num	Member							_							
						Pay	ment Metho	ls			Split Che	ck 🚽							
			Drint	Domate											Print Rec Extra Co				
		Goto	Print Receip	Remote Print	Key Pad	ips									Full Reco		Notes	Final	ize Sale
	Ready																		

Redeeming a Smart Card

Once the Smart Card has been issued, it can now be redeemed by the customer that it was issued to. To redeem one of the Smart Card items, enter the customer's name in the *Sold To* field. A *Smart Card* button will appear. Selecting this button will display the *Smart Card Status* dialogue box. This box contains the available Smart Cards and their quantities for that customer. Selecting this button will also allow the user to check the balance of a customer Smart Card at any time. Just select the customer, click the *Smart Card* button, view the quantities and select *Close*.

Balance	\$0.00 Credit	\$0.00		Acct 8 Type C Class D.	lass I Men	nber	_		~	\ge	Smart Card		1.000	Vo 08	1410090	1:12:56 AM 002 Reprint	Sale
Expire	Prepaid	\$0.00			nited State	×s					•••		-			Last Ticke	Looku
Qty	ltem		ExtPrice	S	Sale	Re	turn	Smar	t Card	Pay On	Account	Gift	Card	Rai	n Check		Prepaid
							Product (Code				Price	Discoun	t Qt	y Exte	ended Pric	e Tax Co
							1-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1-					\$0.0			- 11 (Coloredo)	\$0.0	
				🗌 In sto	ck only												
				1		2	:	3	4						Level	Up	Top Leve
	Smart (Card Statu	s												×		
	Item C	ode	Item Des	crintio	m				Qty S	Shared	Acct	Evo	re Date				
	SCGL5	oue	Golf Less						5	marcu	IACCL	-					
	Double click	con smart card I	to redeem							Print Sn		Print Bal	ance	Clos	50		
	Double click	con smart card I	to redeem							Print Sm ard His		Print Bal	ance	Clos	se		
Oty	Double click Batch Discount	con smart card	to redeem Clear Sale									Print Bal	ance	Clos	se		
	Batch											Print Bal	ance	Clos	se		
Sub Total Tax	Batch Discount \$0.00 \$0.00	Delete Item	Clear Sale									Print Bal	ance	Clos	se		
Sub Total	Batch Discount \$0.00	Delete Item Tips	Clear Sale \$0.00 \$0.00									Print Bal	ance	Clos	50		
Sub Total Tax Total	Batch Discount \$0.00 \$0.00	Delete Item Tips	Clear Sale \$0.00									Print Bal	ance	Clos	se		
Sub Total Tax	Batch Discount \$0.00 \$0.00	Delete Item Tips	Clear Sale \$0.00 \$0.00	Payme	ent Method					ard His		Print Bal	ance	Clos	56		
Sub Total Tax Total Amount Due	Batch Discount \$0.00 \$0.00 \$0.00	Delete Item Tips Tendered	Clear Sale \$0.00 \$0.00 \$0.00	Payme	ent Method				Ca	ard His		Print Bal	ance				

See the below example:

Select the Smart Card item that is to be redeemed and it will be displayed in the sales list. The cost of the item will be 0 because the item was prepaid in the previous step.

	James, Lebro	on		Q	Acct	8							Smart		Date	10/9/	2014 11:14	21 AM	
Balance	\$0.00	Credit	\$0.00		Туре	Class I M	ember						Card		Sale No	0814	10090002		
					Class	DAV									PO#	•	Rep	orint	Sale
Expire		Prepaid	\$0.00	Nati	onality	United Sta	ates										Las	t Ticket	Lool
Qty		Item		ExtPrice		Sale		Return		Smart	Cond	Dans O	n Account	Gift Ca		Rain (Charle		repaid
1	Golf Lessons	5		0.00		Sale		Return		Sman	Card	Payo	n Account	Gint Ca	iiu	Rain	CHECK	PI	repaid
								P	roduct Co	ode				Price	Discount	Qty	Extende	ed Price	Tax (
														\$0.00	0.00%	1		\$0.00	N//
					🗌 In s	stock only										_			
						1		2	3		4						Level Up	Т	op Lev
								2	5		-						Lever op		op Lev
	Participation																		
Oth	Batcl		Delete Item	Clear Sale															
Qty	Batcl		Delete Item	Clear Sale															
	Disc	ount																	
Oty Sub Tota	Disc		Delete Item Tips	Clear Sale \$0.00															
	Disc:	ount																	
Sub Tota	Disc I \$ k \$	ount	Tips	\$0.00															
Sub Tota Ta:	Disc I \$ k \$	0.00 0.00	Tips	\$0.00 \$0.00															
Sub Tota Ta:	Disc I \$ k \$	0.00 0.00	Tips	\$0.00															
Sub Tota Ta: Tota Amount D	Discr I \$ K \$ I \$	0.00 0.00 0.00	Tips Tendered	\$0.00 \$0.00 \$0.00															
Sub Tota Ta: Tota	Discr I \$ K \$ I \$	0.00 0.00 0.00	Tips	\$0.00 \$0.00															
Sub Tota Ta: Tota Amount D	Discr I \$ K \$ I \$	0.00 0.00 0.00	Tips Tendered	\$0.00 \$0.00 \$0.00	Рауг	nent Meth	ods				Split Cher	ck							
Sub Tota Ta: Tota Amount D	Discr I \$ K \$ I \$	0.00 0.00 0.00	Tips Tendered	\$0.00 \$0.00 \$0.00	Рауг	nent Meth	ods				Split Chee	ck							
Sub Tota Ta: Tota Amount D	Discr I \$ K \$ I \$	0.00 0.00 0.00	Tips Tendered	\$0.00 \$0.00 \$0.00	Рауи	nent Meth	ods				Split Cher	t			7 Print Pre	reint			
Sub Tota Ta: Tota Amount D	Discr I \$ K \$ I \$	2000 0.00 0.00 0.00	Tips Tendered Ref Num	\$0.00 \$0.00 \$0.00	Рауг	nent Meth	ods				Split Cher	ck			⊻ Print Re				
Sub Tota Ta: Tota Amount D	Discr I \$ K \$ I \$	0.00 0.00 0.00	Tips Tendered Ref Num Remote	\$0.00 \$0.00 \$0.00 \$0.00 Member	Payr	nent Meth	ods				Split Chee	ck -			✓ Print Re Estra Cc Full Rec	ру	Notes		līze Sa

Select *Finalize Sale* and the transaction will process and reduce the Smart Card total quantity accordingly.

More than one Smart Card item can be redeemed within the same transaction. Simply select the item twice in the Smart Card Status dialogue box or increase the quantity in the sales list before finalizing the sale. For example, if a family wanted two members to take lessons at the same time, change the quantity to 2 and select *Finalize Sale*. This will reduce the Smart card total by two.

There are options within POSExpress that will allow the remaining Smart Card quantities to appear on the sales receipt after each Smart Card transaction.

There are also Smart Card reports in the POSExpress Report module that will provide history, redemption, usage, etc.



The Sales Module

The Sales Module is used to process sales via cash, gift card, credit or debit card. You can also use this module to process returns and issue new gift cards.

From the home screen of POSExpress, navigate to the Sales icon:

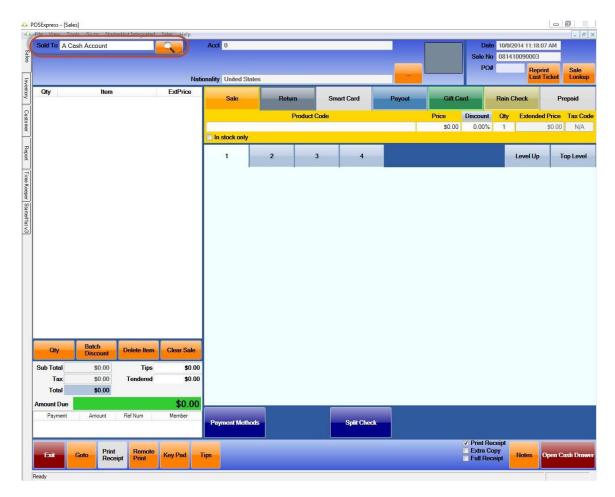


The Sales screen will be displayed. See Below:

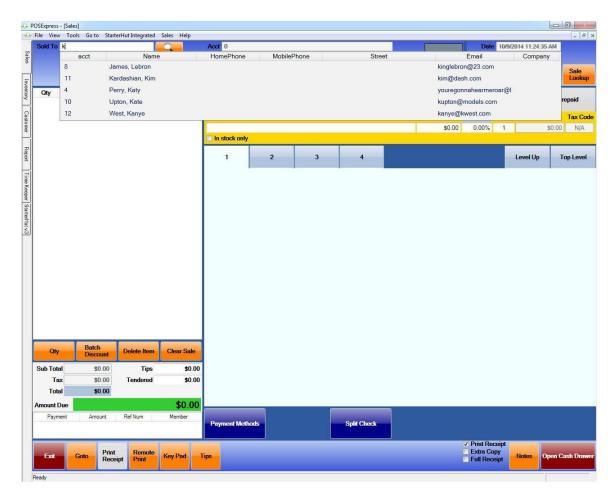
Sold To /	Cash Account		Q	Acct 0	_							ALC: NO.	14 11:18:07	AM
												081410	-	_
			Natio	onality Uni	ited States					L	PO#		Reprint Last Ti	t Sale
Qty	ltem		ExtPrice											
				Sa	le	Retu	m	Smart Card	Payout	Gift C	ard	Rain Ch	neck	Prepaid
							Product Cod	e		Price	Discount	Qty	Extended I	Price Tax C
										\$0.00	0.00%	1		\$0.00 N/A
				In stoc	k only							_		T
				1		2	3	4				-	Level Up	Top Lev
					ł.									le le
Oty	Batch	Delete Item	Clear Sole											
	Discount													
Qty Sub Total Tax	Batch Discount \$0.00 \$0.00	Delete Item Tips Tendered	Clear Sale \$0.00 \$0.00											
Sub Total	Discount \$0.00	Tips	\$0.00											
Sub Total Tax	Discount \$0.00 \$0.00 \$0.00	Tips	\$0.00 \$0.00											
Sub Total Tax Total	Discount \$0.00 \$0.00 \$0.00 e	Tips	\$0.00	Paymen	t Methods			Split Chex	*					
Sub Total Tax Total Amount Du	Discount \$0.00 \$0.00 \$0.00 e	Tips Tendered	\$0.00 \$0.00 \$0.00	Paymen	t Methods			Split Chec	*		√ Print Re			

Note: Buttons, fields and other various options may appear differently. Many options and settings on the Sales screen are customizable to each specific terminal or facility.

The *Sold To* field contains the name of the customer that this transaction is being applied to. In the example below, A *Cash Account* is set at the default account on the Sales screen. This account is used to apply transactions to a generic, anonymous account in POSExpress. The software also allows a specific customer name or account number to be entered in the *Sold To* field.

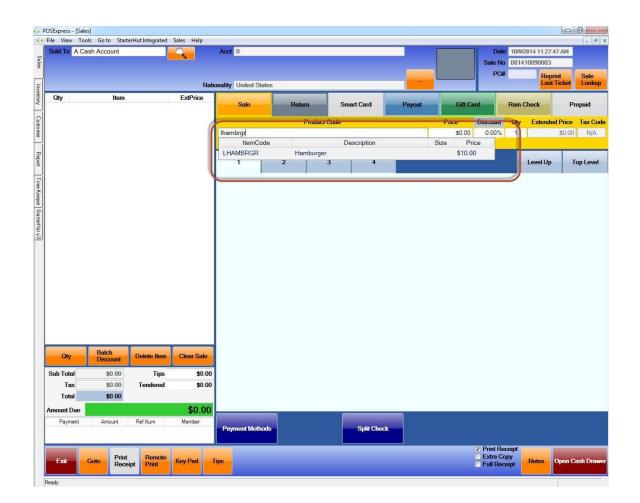


If customers have been created in the *Customer* module, they can be located by typing in a customer's name or account number. As the data is entered, the POSExpress "intelisearch" drop down menu will appear. This menu will display all customers that contain the data entered in the Sold To field. The more data that is entered, the more specific the search becomes and the more exact the matches are displayed. Select a specific customer from the drop down menu and that name will appear in the Sold To field. In the example below, Customer Test was selected as the customer.



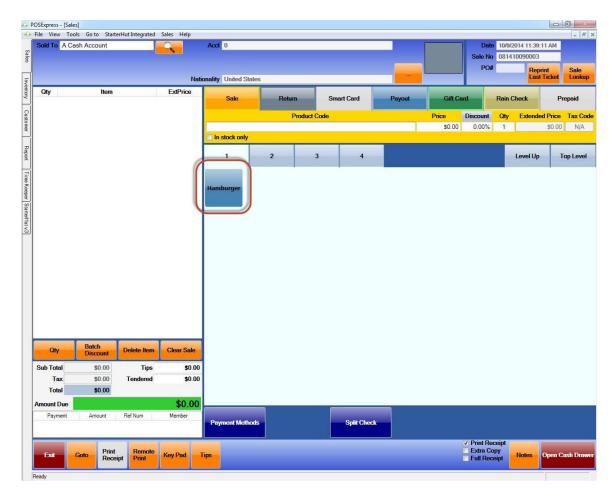
After a specific customer or *A Cash Account* has been selected, a transaction can now be entered. First, an item must be selected. There are three ways to select and item to be sold; barcode scanning, QuickSale Buttons and product search

Barcode scanning can be used if a barcode scanner is installed on the POS terminal. Simply scan the barcode and the item will display in the *Product Code* field. See the example below.



QuickSale Buttons can also be used to locate and sell items. (refer to the QuickSale Button section for setup). The QuickSale menu will be displayed on the Sales. Simply, select the item to be sold.

Product Search is done by entering the item code or description of a specific item into the *Product Code* field. This field also has the "intelisearch" feature and will locate items based on the data entered in the field.



Sold	To A Cas	h Account			Acct 0							10/9/2014 1 08141009	0003 Reprint	Sale
-					ionality United St	ates							Last Ticket	Look
Qty 1		ltem rger		ExtPrice 10.00	Sale	R	eturn	Smart Card	Payout	Gift C	bre	Rain Check	۲ I	Prepaid
	Medium						Product C	ode		Price	Discount	Qty Ex	tended Price	a Tax C
										\$0.00	0.00%	1	\$0.0	0 N//
					In stock only		-1	- T	-			_		
					্য	2	3	4				Leve	el Up	Top Lev
						1								
					Hamburger									
	~	Batch	Contraction of the	01 01										
	Qty	Discount	Delete Item	Clear Sale										
Sub	Total	\$10.00	Tips	\$0.00										
	Tax	\$0.00	Tendered	\$0.00										
	Total	\$10.00	rendered	0.00										
12		\$10.00		114010-000										
13	int Due			\$10.00	<u> </u>	_		_						
	ayment	Amount	Ref Num	Member										
mou					Payment Meth	ods		Split Ch	ieck					
mou														
mou											CONTRACTOR OF A	- 14 - 17 - 2		
mou		Prin	t Remote	Key Pad							Print Rec			

Once a product has been selected, it will appear in the adjacent sale's list.



Once all the products to be sold have been selected, select the Finalize Sale.

When specific options associated with the sequence of a sales transaction are set accordingly, the *Payment Method* screen will appear. Select the payment method for the transaction.

/ment Met	thod		Ar	nount Due:	\$10.00
Member Account	CASI	Mastercard	VISA	AMERICAN	
Other	Personal Check	Room Charge	Travelers Check	Prepaid	Gift Card
Credit					
	-				
				Split Paymer	nt Cancel

This screen may contain different methods of payment based of each facilities option settings. In the example above, many payment methods are available.

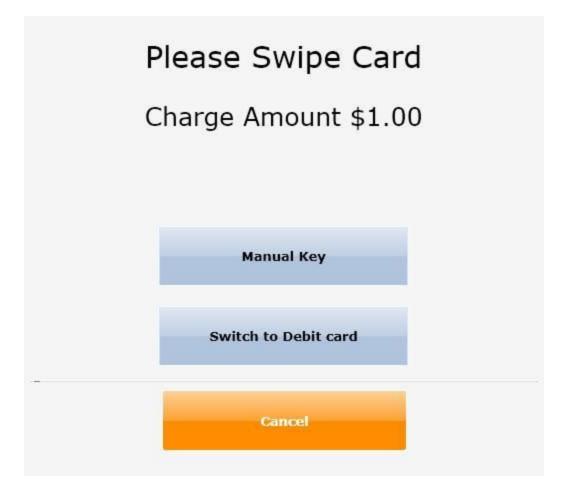
When specific options associated with the sequence of a sales transaction are set accordingly, the *Tendered Amount* screen will appear with *Quick Amount* on one side and *Manual Input* on the other. Enter the correct amount, and the *Change Due* screen will display the change due back to the customer.

			10.00 \$ Manual Input					
	Quick Amount							
\$15.00	\$20.00	\$25.00	7	8	9	Back Space		
\$30.00	\$35.00	\$40.00	4	5	6	Clear		
\$45.00 \$55.00		\$65.00	1	2	3	Enter		
	Exact Amount		D	60				

Credit Card Transactions

When a facility utilizes the POSExpress integrated credit card feature, credit card data can be entered, simply by swiping the card through a card swipe.

After selecting all items to be sold, select the specific card form the payment method screen or select the *Credit Card* button at the bottom of the Sales screen. The dialogue box shown below will appear.



In the example above, the *Entry Method* field is defaulted to *Card Reader*. Swipe the card through the card reader and the sale will process. If there is no card reader equipped, select *Manual Entry*. Enter the Card Number and the Expiration Date and select Authorize. The sale will process.

Gift Card Transactions

When a facility utilizes the POSExpress integrated gift card program, gift card data can be entered, simply by swiping the card through a card swipe, scanning it with a bar code scanner or entering it manually within the sales screen.

After selecting all items to be sold, select gift card form the payment method screen. The dialogue box shown below will appear.

Please	Swipe or Scan the card	
Entry Method	Type ← Internal	Check Balance
Manual Entry	○ External	Charge Card
		Initialize New Car
Card Card Number:		Add Value To Car
Name: Expire Date:	@@	
		Card History
Current Balance	\$3.20	
	CVV2:]

If a card swipe or scanner is installed on the POS terminal, swipe the gift card through the card swipe or scan the bar code it to use it.

If a card swipe or scanner is not installed on the POS terminal, select *Manual Entry* and enter the number of the gift card. The sale will process, and the sale amount will be deducted from the gift card.

Returns

To process a return, first select the *Return* tab next to the *Sales* tab in the Sales screen and the *Return Credit Options* screen will appear, displaying all the possible ways that a transaction can be returned. In the example below, ALL methods are displayed. These can be customized for each specific facility.

	POSExpress - [Sa											
-		ools Go to Start Cash Account	erHut Integrated	ales Help	Acct 0			_	fi .	Data	10/9/2014 12:06	_ 8 ×
Sales	Suid TO X	Jash Account		~	haa 0						081410090006	
_										PO#	Rej	orint Sale
Inve				Natio	nality United States						Las	t Ticket Lookup
Inventory	Qty	Item		ExtPrice	Sale	Return	Smart Card	Payout	Gift C	and	Rain Check	Prepaid
Customer						Product	Cada		Price	Discount	Qty Extend	ed Price Tax Code
Istome						Ploque	Code		\$0.00		1 Extend	\$0.00 N/A
					In stock only							
Report				Return	Credit Options				×		Level Up	Top Level
Time				Refund	via Cash		Refund via Room (⁻ harge				
Keepe												
Report Time Keeper StarterHut v3				Refund	via Credit Card		Refund via Custon	ner Credit Book				
Hut v3				Refund	via Personal Check		Refund via Custon	ner Ledger				
				Refund	via Gift Card		Refund via Sale N	umber				
				Specify	Payment Later		5		_			
				Apply t	o an Invoice		Return via Credit I	Memo	-1			
	Qty	Batch Discount	Delete Item	C				Cancel				
	Sub Total	\$0.00	Tips	\$0.00								
	Tax	\$0.00	Tendered	\$0.00								
	Total	\$0.00										
	Amount Due			\$0.00				_				_
	Payment	Amount	Ref Num	Member	Payment Methods		Split Che	ck				
		1	1 1			J				✓ Print Rec		
	Exit	Goto Print Rece		Key Pad Ti	pa					Extra Coj Full Rece		Open Cash Drawer
	Ready											

If a card swipe or scanner is installed on the POS terminal, swipe the gift card through the card swipe or scan the bar code it to use it.

If a card swipe or scanner is not installed on the POS terminal, select *Manual Entry* and enter the number of the gift card. The sale will process, and the sale amount will be deducted from the gift card.

The following is a list of all return methods and their descriptions:

Refund via Cash: Select the item(s) to be returned via Quicksale buttons, scan or product search and select *Finalize Sale*. The *Return Cash* screen will display the amount to be returned to customer.

Refund via Credit Card: Select the item(s) to be returned via Quicksale buttons, scan or product search and select *Finalize Sale.* The *Entry Method* section will appear. Follow the same process explained in the credit sales section of this document.

Refund via Personal Check: Select the item(s) to be returned via Quicksale buttons, scan or product search and select *Finalize Sale*. A dialogue box will appear. Enter the personal check number. The return will process.

Return via Gift Card: Select the item(s) to be returned via Quicksale buttons, scan or product search and select *Finalize Sale*. If a card swipe or scanner is installed on the POS terminal, swipe the gift card through the card swipe or scan the bar code it to use it. If a card swipe or scanner is not installed on the POS terminal, select *Manual Entry* and enter the number of the gift card. The return will process, and the return amount will be added to the gift card.

Return via Room Charge: Select the item(s) to be returned via Quicksale buttons, scan or product search and select *Finalize Sale*. The amount will be returned to the room charge.

Return via Customer Credit Book*: Select the item(s) to be returned via Quicksale buttons, scan or product search and select *Finalize Sale*. The total will be reimbursed to the customer's Credit Book.

Return via Customer Ledger*: Select the item(s) to be returned via Quicksale buttons, scan or product search and select *Finalize Sale*. The total will be reimbursed to the Customer's Ledger, which can be viewed in the individual customer's ledger in the **Customer** module.

Return via Sale Number: A screen will appear that enables a search using sales number, reference number or customer name. See example below.

A POSExpress - [Sales]		
File View Tools Go to StarterHut Integrated Sales Help		_ 8 ×
Sold To A Cash Account	Acct 0	Date 10/9/2014 12:13:31 PM
S)		Sale No 081410090006
		PO# Reprint Sale
F Nation	ality United States	Last Ticket Lookup
Nation Nation Oty Item Sales Look	up	× Printed Print
2		ard Rain Check Prepaid
C Search From Sale Number	n Sales Number	
ISIO		Discount Qty Extended Price Tax Code
है Sale Number	081410090005	0.00% 1 \$0.00 N/A
C Search By E	eference Number	
C Search By F		Level Up Top Level
2		
Fro	n: 10/ 9/2014 - To: 10/ 9/2014 -	
C Search By C	ustomer	
Time Keeper		
8		
Fro	n: 10/ 9/2014 - To: 10/ 9/2014 -	
Search By S		
Fro		
C Search By S		
Fro	n: 10/ 9/2014 + To: 10/ 9/2014 +	
C Search By T	he Last 4 Digits Of Credit Card Number	
Fro	n: 10/ 9/2014 - To: 10/ 9/2014 -	
Ohr Batch Delote Itom	10/ 5/2014	
Discount Delete term		
Sub Total \$0.00 Tips		
Tax \$0.00 Tendered		
Total \$0.00		
Amount Due	Last purchased OK Cancel	
Payment Amount Ref Num	look up	•
	Payment Methods Split Check	
		✓ Print Receipt
Exit Goto Print Remote Key Pad Tip	5	Extra Copy Full Receipt Notes Open Cash Drawer
Ready		

- To search using the sales number: The sale number field will contain the number of the last processed sale. If this is not the sale to be returned, simply use the arrow buttons or enter the sale number of the sale to be returned and select *OK*. The entire sale, just as it was entered originally, will be displayed on the sales screen. <u>This cannot be edited</u> <u>or changed</u>. Select *Finalize Sale* to process the return.
- To search using the payment reference number: Enter the reference number and select OK. The original sale will be displayed on the sales screen. Select *Finalize Sale* to process the return. To search using customer name: Enter the customer's name or account number and select OK. A list of sales to that specific customer

will be displayed. Select the sale that needs returned. The sale will be displayed on the sales screen. Select *Finalize Sale* to process the return.

Sales Function Buttons

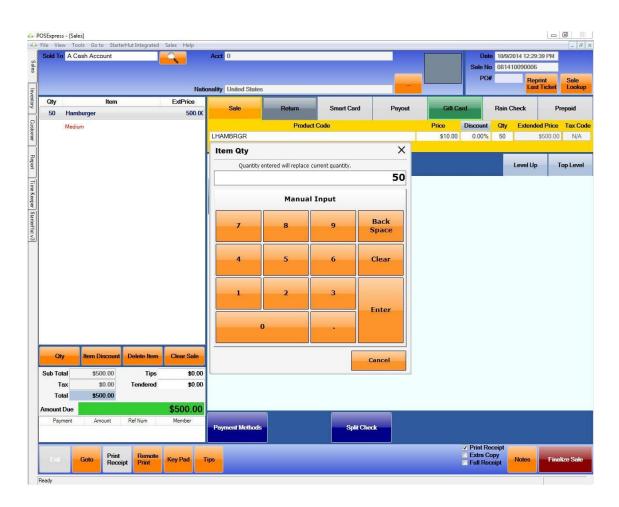
The Sales Function Buttons are located beneath the Sales Items field. These buttons allow the user to perform specific functions prior to finalizing an individual transaction. Based on the option settings of particular facilities, the following buttons may or may not be visible:

> Qty (Quantity) Batch (Item) Discount Delete Item Clear sale

Quantity

This button allows the user to change the quantity of an individual item. After selecting an item to be sold, select the *Qty* button. A keypad will be displayed. Simply enter the qty of the item to be sold and select *Enter*. In the example below, fifty hamburgers are sold. The Qty button can also be selected, and a quantity entered, prior to selecting the specific item. The quantity entered will be applied to the next item selected.

The quantity of an item can also be increased by selecting it more than once. For example, if a QuickSale Button is selected four times, the quantity of that item will be displayed as four. If it is scanned three times, the item quantity will be displayed as three.



Applying a Discount

The *Batch Discount* button has two functions. It provides the ability to apply a discount to the entire sale, known as a batch discount. The same button will also provide the ability to apply the same or separate discount amounts to individual items within a list of items.

To apply a batch discount, a discount to the entire sale, enter all of the items for the sale by selecting Quicksale Keys or entering the product codes in the **Product Code** field. Once the items have been entered, select the **Batch Discount button**. The Batch Discount keypad will be displayed. In the example below, the user can enter the discount amount by using the **Quick Amount** keypad or the **Manual Input** keypad. The discount entered will be applied to the entire sale and the discount amount will be displayed on the button, itself.

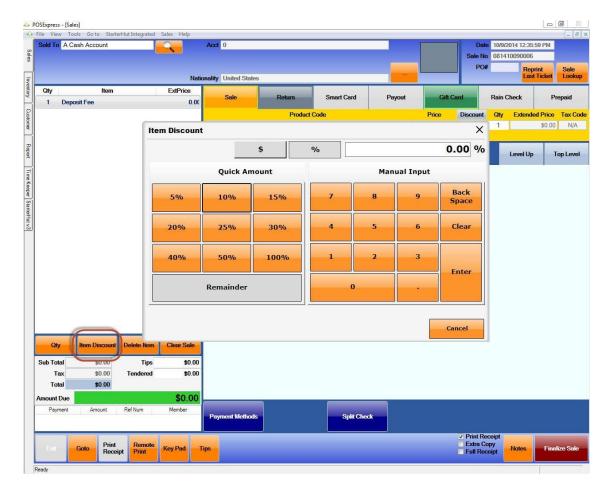
POSExpress also contains settings in the Options screen that allow for discounts by specific dollar amounts, as opposed to percentages. The discount function can also be password protected.

	A Cash Account	Nat	Acct 0 ionality United States					Date Sale No PO#	0814	/2014 12:34:0 410090006 Repri	
Qty	Item	ExtPrice	Sale	Return	Smart Card	Payout	Cia	Card	Dain	Check	Prepaid
1	Deposit Fee	0.00	Jaie			rayout				CARDING CO.	
				Product C	ode		Price	Discount	-	Extended	IPrice Tax \$0.00 N
		Batch Dis	count Percent						×		_
								0.00	%	Level Up	Top Le
			Quick #	Amount		Manu	al Input				
		5%	10%	15%	7	8	9	Back Space			
		20%	25%	30%	4	5	6	Clear			
		40%	50%	100%	1	2	3				
			Remainde	r	C	,		Enter			
Q	ty Batch De	lete Item						Cancel			
		Tips \$0.00 endered \$0.00									
Mouni Pay		\$0.00 f Num Member	Payment Methods		Split Chee	*					
Eat	Goto Print Receipt	Remote Print Key Pad	Tips					✓ Print Re Extra Co Full Rec	ру	Notes	Finalize S



To apply a discount to an individual item, first select the item in the sales list. Once selected, the item will be highlighted. Select the *Item Discount* button. Notice that when only one item is listed in the sales list, the button will read Item Discount. When there is a list of items in the sales list, the button will read Batch Discount. After the button is selected, the *Item Discount* keypad will appear. Enter the desired discount using either the *Quick Amount* or *Manual Input* and select *Enter*. The discount entered will be applied to the highlighted item and the discount amount will be displayed on the button, itself. See images below.

A different discount amount can be applied to each individual item in the sales list. Simply highlight an item, apply the desired discount on the keypad and select Enter. Then, highlight the next item and apply a separate discount to that item.





Deleting an Item

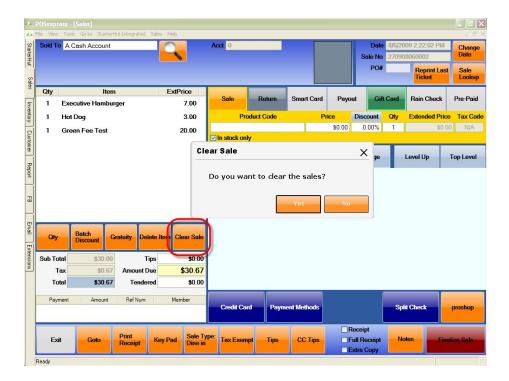
The *Delete Item* button enables the user to remove individual items from the sales list. Select the item to delete. Once selected, the item will be highlighted on the screen. Select the *Delete Item* button and the item will be removed.

When an item has a quantity greater than one, the *Delete Item* button will reduce the quantity by one. If an item that has a large quantity needs removed, it is suggested to use the *Quantity* button and enter "0". This will leave the item in the sales list with a quantity of zero. Now, it can be highlighted and *Delete Item* can be selected.

Clearing a Sale

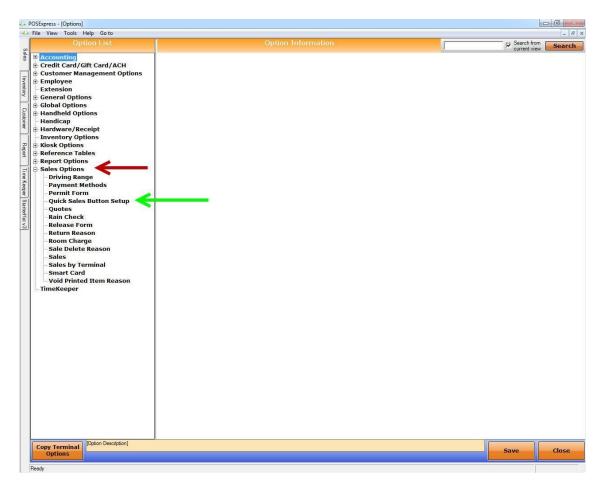
The *Clear Sale* button enables the user to completely clear a transaction at anytime, before it is finalized. Select the *Clear Sale* button. A dialogue box will appear to confirm the decision. If the sale is to be cleared, select *Yes*. If the sale is not to be cleared, select *No*. Selecting No will take the user back to the transaction in progress.

See image below.



Quick Sales Button

Quick Sales Buttons are the buttons on the *Sales* screen that enable the user to sell an item from inventory quickly. These buttons are customizable and can be created in the Quick Sales Button Setup section of the POSExpress options screen. Based on security login levels, this screen may or may not be accessible. To enter the Quick Sales Button Setup, at top of the Main Menu, select *Tools -> Options*, or select the F2 key on the keyboard. This will open the Options Screen. Next, go to the Sales Options menu and select the "+" sign. This will open the Sales Options. Now, select *Quick Sales Button Setup*. This will open the Setup screen.



Button Layout

There will be a button titled *Button Layout* on the setup screen. This enables the user to customize the landscape of the four pages of the Quicksale Button grid as it appears on the Sales screen. There are two selections for this grid:

- Dynamic The standard button setup or 3 rows and 7 columns.
- Fix allows the user to customize the grid by changing the amount of rows and columns that will be displayed.

Once the decision is made for Button Layout, select OK in the Button Layout dialogue box. In the event this grid needs to be changed, simply open the Button Layout screen and change the settings.

Creating a Quick Sales Button

After determining the button layout, the Quick Sales Buttons can now be created. Using the Search tools located on the left of the screen, locate the item or items that a Quick Sales Button will be assigned to. This can done using the Supplier and/or Category filters or by entering the item code in the Product field. After locating an item, simply click and drag the item to a location on the quick sale grid. This will create a Quick Sales Button for the specific item. The example below uses a fixed button layout with 3 rows and 7 columns. The product called "Hamburger" was selected and dragged and dropped to the first cell in the Quick Sales grid.

															Search f	view Sea
Product	GO	1	2		3		4	<	<	>	>	Sort curre page	ent C Sort inside mer No sort inside r		Top Me	nu Level
Supplier												Derik C	1			
	Category															
Terminal	ZUCHELLIJ-PC 🔻															
Code	Description	Homb	urger													
0011	Chicken	name	urger													
0012	Pizza															
0013	Hot Dog															
0014	Salad															
0015	Pepsi															
0015	Red Bull			1			-			1				-		
0017	Bud Light															
ADMINCHARGE	Admin Charge															
BankReject	ACH Rejection															
BOTTLERETURN	Bottle Return															
CARTFEEAUCTION	Special Cart															
DeclareCashTips	Declare Cash Tips															
DEPOSITFEE	Deposit Fee															
ENTRANCEFEE	Entrance Fee															
LATERETURNCHARGE	Late return charge															
LHAMBRGR	Hamburger			-									-			
OnlineHandlingFeeItem OnlineInterShippingItem OnlineShippingItem	Web Store Handling F Web Store Internatio Web Store Shipping I															
RENTALCHARGE	Rental Charge															
RSPL	Range Pin Large															
RSPM	Range Pin Medium															
RSPS	Range Pin Small															
SCGL5	Golf Lessons - 5															
SERVICECHARGE	Gratuity															
SURCHARGE	Surcharge			_		_				_						
TeeSheetRainCheck	Tee Sheet Rain Check	Path :	age 1													Section: 1
TEETIMEAUCTION	Special Tee Time															
reenanchoorion	opecial ree rine	Add	Add s	n l	Move	Pa	aste	De	elete	i.	Ref	esh				Cle
		Preview	Button	Type duct C	Smart Car	d C B	ackane	Proc	luct Co	ode		Product D	escription			
		Hambur				k Color										
		er		-	amburger		-	Der	oduct (Code		Descrip	ion			
					anduiger				AMBRG		-	Hambur				
		Is Men	u Font s	ize: 9			-		anonee			- and but	3-1			
		Bold	F	ont: Ta	ahoma		-									
		Image:		10			1									
		inage.	Inser		Save		Cance	el						Press de	lete to remo	ve product fro
		Copy by Terminal	Create fro	m Cop	y by Termin Package	nal's /	Apply to 0	Other	Resto	re Qu	uick Sale	-		But	ton Defa	ault Ren
orag and drop product to quic		Terminal	Category	e	Package		Termin	nal		Butto	ons			Lay	out Pa	ge Pa
Copy Terminal Quick Sale	s Button Setup.															

Editing a Quick Sales Button

Located beneath the Quick Sales Button grid is an options section. These options are directly related to each specific Quick Sales Button and allow the user to edit each button individually. The options are described below.

Preview	Button Type Product	C Smart Card C Package	Product Code	Product Description
	Fore Color:	Back Color:		
er	Label:	Hamburger	Product Code	Description
🗌 Is Menu	Font size:	9 💌	LHAMBRGR	Hamburger
Bold	Font:	Tahoma 💌		
Image:		💥		
	Insert	Save Cano	el	Press delete to remove product from list

- Is Menu Selecting this allows the user to create a "Sub Menu" underneath this button. This button will act as the "Parent" button and provides the user with the ability to add "Child" buttons beneath it. An example of a Parent button is "Beverages". An example of the Child buttons beneath is "Pepsi", "Coke", "Sprite", "Mt. Dew", etc.
- Fore Color Choose the font color of the button.
- **Back Color** Choose the background color of the button.
- Label Edits the text on the button. The default label will be the products description
- Image Allows the user to attach an image to the button. Select _____, browse to the image and select open. This will attach the selected image

to the button. To remove the image from the button, select the *button*.

- **Button Type** Select the type of item that a button is being created for. "Product" type is the default. Typically, this is the type of most items in inventory.
- **Product Code** Extra product codes and description can be entered here. The program will automatically take the code and description from the inventory item when it is dragged from the list to the Quicksale panel.

After any changing or editing of a Quick Sales button is complete, select "Save" to save changes.

Creating Parent/Child (Sub-Menus)

To add a menu item on the Quick Sales grid, select a vacant cell on the grid. Once selected, the cell will be highlighted. In the options section, place a check in the *Is Menu* box and add the description of the button in the *Label* field. Select *Save*.

									1	Search from current view	Searc
Product	GO	1	2	3	4	< <	> >	Sort curr page	ent C Sort inside menu No sort inside menu	Top Menu	Level U
Supplier	Category				1		1		1		
	[All] •										
and the second s											
Terminal	ZUCHELLIJ-PC -										
Code	Description	Hamb	urger								
0011	Chicken	TIGITIC	drg di								
0012	Pizza										
0013	Hot Dog										
0014	Salad										
0015	Pepsi										
0016	Red Bull										
0017	Bud Light										
ADMINCHARGE	Admin Charge										
BankReject	ACH Rejection										
BOTTLERETURN	Bottle Return										
CARTFEEAUCTION	Special Cart										
DeclareCashTips	Declare Cash Tips										
DEPOSITFEE	Deposit Fee										
ENTRANCEFEE	Entrance Fee										
LATERETURNCHARGE	Late return charge										
LHAMBRGR	Hamburger	_									
OnlineHandlingFeeItem OnlineInterShippingItem OnlineShippingItem RENTALCHARGE	Web Store Handling F Web Store Internatio Web Store Shipping I Rental Charge										
RSPL	Range Pin Large	Dri	nks								
RSPM	Range Pin Medium										
RSPS	Range Pin Small										
SCGL5	Golf Lessons - 5										
SERVICECHARGE	Gratuity										
SURCHARGE	Surcharge										
TeeSheetRainCheck	Tee Sheet Rain Check	Path :	age 1							S	ection: 1
TEETIMEAUCTION	Special Tee Time					-					-
	-p	Add	Add Su Item	b Move	Paste	Delete	Re	fresh			Clea
		Preview	Button T	t C Smart Car	d C Packag	Product C	ode	Product D	Description		
			Fore Colo		k Color:				55767925935257		
			Labe			Product	Code	Descrip	tion		
		Is Men			10	-	200.000		ntra ibr		
					•						
		Bold	Fon	t: Tahoma							
		Image:			🕷						
			Insert	Save	Car	cel			Pre	ss delete to remove pr	oduct from
		Copy by Terminal	Create from	Copy by Termin Package	al's Apply 1	o Other Rest	ore Quick Sa Buttons	le		Button Default Layout Page	Rena Pag
Drag and drop product to quic	k sale pane 28 items s Button Setup.	[Category	Раскаде	Ter		buttons			Layout Page	Pag

In the example below, a Drinks button is created as a Menu button.

Once the menu button has been created, select it from the Quick Sales grid. The menu button will appear in the Preview box located below the grid. Next, select *Add Sub Item.* This will bring up an empty Quick Sales grid. Next, drag and drop inventory items that will be located under this menu button. These items will be the "Child" buttons.

In the "Drinks" button example on the next page, "Pepsi", "Red Bull" and "Bud Light" were used.

		Quick Sa	iles Bu	tton	Setup											Se Se	arch from	Searc
Product	GO	1	2		3		4	<	< >	· >I		currer page		inside men ort inside n		1	p Menu	Level U
Supplier	Category						_								1		-	
	[All] •																	
 Terminal																		
Code	Description	2.55			-				2									
0011	Chicken	Pe	osi		Red Bull		Bu	d Ligh										
0012	Pizza																	
0013	Hot Dog																	
0014	Salad																	
0015	Pepsi	<u> </u>										_			-		_	
0016	Red Bull																	
0017	Bud Light																	
ADMINCHARGE	Admin Charge																	
BankReject	ACH Rejection																	
OTTLERETURN	Bottle Return																	
ARTFEEAUCTION	Special Cart																	
DeclareCashTips	Declare Cash Tips																	
EPOSITFEE	Deposit Fee																	
NTRANCEFEE	Entrance Fee																	
ATERETURNCHARGE	Late return charge																	
HAMBRGR	Hamburger																	
OnlineHandlingFeeItem OnlineInterShippingItem OnlineShippingItem	Web Store Handling F Web Store Internatio Web Store Shipping I																	
RENTALCHARGE	Rental Charge																	
RSPL	Range Pin Large																	
RSPM	Range Pin Medium																	
RSPS	Range Pin Small																	
SCGL5	Golf Lessons - 5																	
SERVICECHARGE	Gratuity																	
SURCHARGE	Surcharge	1													1			
TeeSheetRainCheck	Tee Sheet Rain Check	Path :	age 1>>	Drinks													Se	ection: 1
TEETIMEAUCTION	Special Tee Time											_						_
LETIMEROCTION	opecial rec rine	Add	Add		Move	Pa	iste	Dele	ete	Re	fresh							Cle
																		Selec
		Preview	Button Pro	Type	C Smart Car		000000	Produ	et Cod		Dee	duct Do	scription					
			1º Pro	auct				FIGUU	ct cou	5		uuci De	scription					
			Fore C	olor:	Bac	k Color	:											
			1997		_			Prod	uct Co	de	D	escriptio	0		1			
				bel:	1			1100	uce co			coorpen			-			
		Is Men	Font s	ize:	9		-	1										
		🔽 Bold	E	ont:	Tahoma		-											
		1000					*	1										
		Image:						1										
			Inser	t j	Save		Cance	al 👘							Press	delete to r	remove pr	oduct from
10 1 10 10 10 10 10 10 10 10 10 10 10 10	k sale pape 28 items	Copy by Terminal	Create fro Categor	om C	opy by Termin Package	nal's A	pply to 0 Termin	Ither I	Restore Bu	Quick Sattons	ale					Button	Default Page	Rena
Irag and drop product to quic	is Button Setup.								_	_								
Copy Terminal	A CONTRACTOR OF CONTRACTOR															Exit		Close

Moving Quicksale Buttons

To move Quicksale Keys to a different location on the grid:

- Select the button that needs to be moved
- Select Move
- Select an open cell in the panel where the button is to be moved
- Select **Paste**
- The button will be moved to the highlighted location

Deleting Quicksale Buttons

To delete a Quick Sales Button, select the button to delete. Select **Delete**.

Copying Quicksale Buttons

Once Quick Sales Buttons are created, the same button layout can be pushed to other terminals on the network. If the exact button grid will be used on multiple terminals, this option allows the buttons to be copied from one terminal to another. From the *Quick Sale Button Setup* screen:

- Select **Copy by Terminal**.
- A dialogue box will appear containing *From* and *To* drop down menus.
- From the drop down menus, choose which terminals to copy the Quick Sales button layout *From* and which terminal to send them *To*. Select *OK*
- A confirmation message will appear. Review the choices and select *Yes* or *No*.

Other Options

- **Default Page** Allows the user to determine which page of Quick Sales buttons will be displayed when opening the Sales screen.
- **Rename Page** Allows the user to enter a specific description for each of the pages of the Quick Sales Button grid.

Using Quick Sale Keys



After making any changes or additions to the Quick Sales buttons, exit to the main menu screen. This refreshes the Quick Sales grid on the Sales screen. *The grid will not reflect the changes made before the software is exited to the Main Menu.*

From the Main Menu, select the **Sales** module. The Quicksale Button grid will be displayed in the body of the Sales screen. Simply select the button to sell the assigned item.



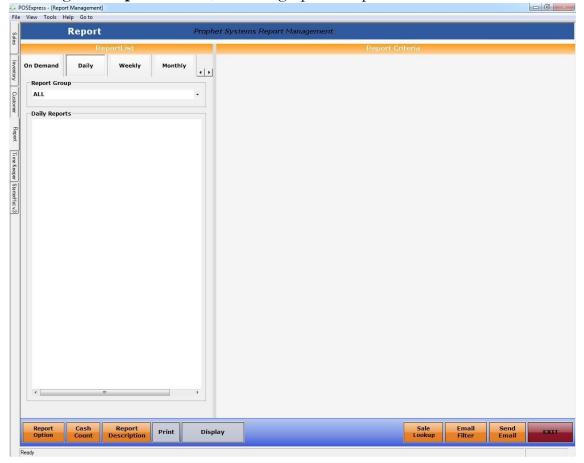
The Reporting Module

The Reporting Module offers hundreds of reports generated by your sales data to help you manage your business more effectively. These reports can also easily be exported to Microsoft Excel or your accounting software of choice.

From the home screen of POSExpress, navigate to the **Report** icon:



Selecting the **Report** button, will bring up the Report module. See below:



The 5 tabs at the top of the report list section provide quick access to reports that will be used.

- **On Demand –** These are reports that are needed quickly and frequently checked throughout the day.
- **Daily** These are reports that are used each day. The default setting will be the current day. The date range default will reflect the current day.
- Weekly These are reports that are used each week. The default setting will be the previous week. The date range default will be the last complete week, Monday through Sunday.
- Monthly These are reports that are used each month. The date range default will be the last complete month.
- Yearly These are reports that are used each year. The date range default will be the current year.

Each of the 5 report tabs can be customized to display only specific, desired reports. This is by done by first selecting the report tab that is to be customized. In the example below, On Demand is selected.

Name: ZUCHELLIJ-PC On Demand Daily Weekly Monthly Yearly silable reports : Selected reports : Balancing Report >> ounting Summary Report >> Itance Detail >> initance Summary > Aging Report Summary > Aging Report Summary > Aging Report Summary Invoice Aging Report Summary ance Cash Drawer (Old) ance Cash Drawer (Old) ance Cash Drawer With CC Tips ance Cash Drawer with CC Tips ance Cash Drawer with CC Tips ance Cash Drawer with CC Tips ance Cash Drawer with CC Tips ance Cash Drawer with CC Tips by terminal ance Cash Drawer with CT person k Draft Ileassioned Accounts:	erminal:	2015) 	eport Opt		
silable reports : Selected reports : Balancing Report counting Summary Report >> 1 Renew >> der Report >> nittance Detail >> nittance Summary > Aging Report Summary > Aging Report Summary ance Cash Drawer (Old) ance Cash Drawer count by Transaction ance Cash Drawer with CC Tips ance Cash Drawer with CC Tips by terminal ance Cash Drawer with CC Tips by terminal ance Cash Drawer with Tips by Person k Draft Linassioned Accounts:					
Balancing Report counting Summary Report H Renew der Report initiance Detail mittance Summary Aging Detail Report Aging Report Summary Asing Report Summary Asing Report Summary ance Cash Drawer ance Cash Drawer (Old) ance Cash Drawer by terminal ance Cash Drawer Details ance Cash Drawer with CC Tips ance Cash Drawer with CC Tips by terminal ance Cash Drawer with CC Tips by terminal ance Cash Drawer with CC Tips by terminal ance Cash Drawer with Tips by Person ik ACH Rejection ik Draft Unassigned Accounts	On Demand Daily	Weekly	Monthly	Yearly	
ounting Summary Report 1 Renew Her Report Initiance Detail nittance Summary Aging Detail Report Aging Report Summary Aging Report Summary Aging Report Summary Invoice Aging Report Summary ance Cash Drawer ance Cash Drawer by terminal ance Cash Drawer by terminal ance Cash Drawer with CC Tips ance Cash Drawer with CC Tips ance Cash Drawer with CC Tips ance Cash Drawer with Tips by Person k ACH Rejection k Draft Linassigned Accounts	ilable reports :	PLAMES	Se	elected reports :	
	2H Renew Ider Report Imittance Detail Imittance Summary 2 Aging Detail Report 2 Aging Detail Report 2 Aging Report Summary 3 Aging Report Summary 4 Invoice Aging Report 3 Invoice Aging Report 1 Invoice Aging Repo	/ terminal	> <		
	ne - send Email Time:				

This screen enables the user to populate each report tab with only the desired reports.

- Selecting the _____ button will bring **all** of the *Available Reports* to the *Selected Reports* section of the selected tab.
- Selecting a single report from *Available Reports* and selecting the ______ button will bring that report over to *Selected Reports*
- Selecting a report in *Selected Reports* and selecting the _____ button will send the report back to *Available Reports*. This will remove the report from the *Available Reports* list
- Selecting the _____ button will bring all the *Selected Reports* over to the *Available Reports* section. This will remove all reports for that tab.

Any date range can be displayed on a report by selecting the starting and ending date from the specific reports *Date Range From and To* fields. A drop down calendar will appear to assist with selecting a date.

From :	10/10	0/201	.4			To :	10/1	0/2014	-
ore group :	4		Octo	ber,	201	4	•		
ore group .		Mon	Tue	Wed	Thu	Fri	Sat		
Name:	28	29	30	1	2	3	4		
	5	6	7	8	9	0	11		
ore Code: -	12	13	14	15	16	17	18		
	- 19	20	21	22	23	24	25		
	26	27	28	29	30	31	1		
	2	3	4	5	6	7	8		
	2	Too	lay:	10/1	0/2	014			

Once the report specific options have been chosen, for example date range, specific terminals, and categories; select the **Display** button to preview the report. Based on the size of the data and the date range, the report may take several minutes to display. The report will appear in a new window. Below is an example of the *Sales Report*.

	Zoom: - 📑 Print	🧼 Goto	Ø Refre	sh 🔍 Search	I 🖃 Auto emai	l 👆 Report	Sort 🚳 Repo	ort Filter 👻 Excel
	POSExpress						3	Sales report
	Facility informati	on	From:	6/1/2009	To: 6/30/2	2009		7/21/2009 4:35:51PM
							Terminal name	
Cat	egory Item description	Qty		osstotal Iding tax)	CO State	Так2	Так3	Nettotal (excluding tax)
Alt	erations							
	Alterations		3	117.00	0.00	0.00	0.00	117.00
	Total: Alterations		3	117.00	0.00	0.00	0.00	117.00
Ba	gs & Accessories							
	Am&E Jumbo Leather Headcover		2	49.92	1.92	0.00	0.00	48.00
	Club Glove Burst Proof W/Wheel		1	196.56	7.56	0.00	0.00	189.00
	Daphne's Hummingbird Headcover		3	78.00	3.00	0.00	0.00	75.00
	Gustbuster Logo Umbrella 1850		2	83.20	3.20	0.00	0.00	80.00
	Headcover-Am&E Driver/Putter		1	12.48	0.48	0.00	0.00	12.00
	Laser Link Quicksilver		3	776.88	29.88	0.00	0.00	747.00
	Ping Hoofer Vantage Bag		3	547.74	21.06	0.00	0.00	526.68
	Titleist Cart/Carry Bag		3	683.28	26.28	0.00	0.00	657.00
	Total: Bags & Accessories	đ		2,428.06	93.38	0.00	0.00	2,334.68
Ca	ddy Fees							
	Allen, Matt	3	23	2,755.00	0.00	0.00	0.00	2,755.00
	Brenengen, Chad		1	160.00	0.00	0.00	0.00	160.00
	Broderick, Jay	1	21	2,685.00	0.00	0.00	0.00	2,685.00

Exporting Reports

The software has the ability to export the report into different formats that may be used for other programs or easy visibility. The most common exports are Excel and Portable Document Format (PDF). The following three steps correspond with the numbered areas contained in the image below.

To export a report to a specific file type:

- Select which format is needed from the drop down menu in the report window. In the example below, Excel is selected. (#1 below)
- Select Export Report. (#2 below)
- A dialogue box will display containing the location of the file. (#3 below)

