CLUB PROPHET
systems

CHAPTER

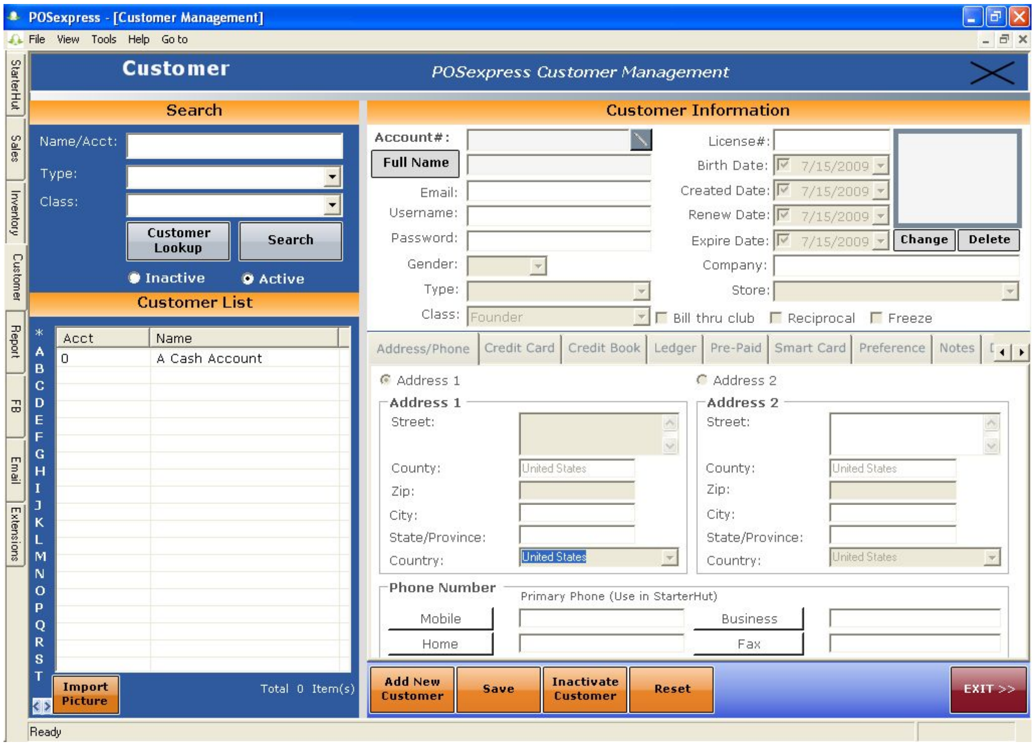
1

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.

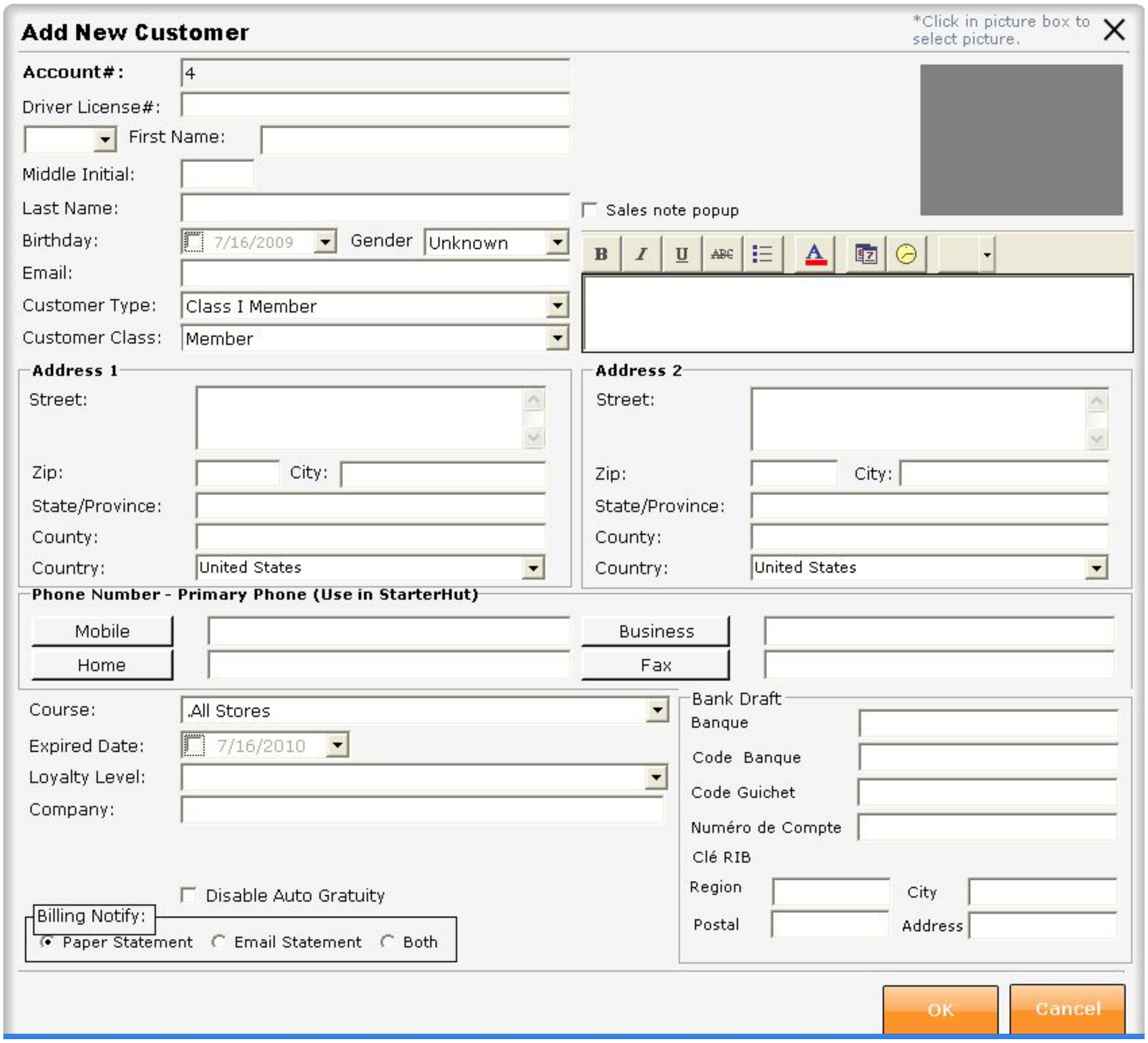
From the home screen of POSExpress, navigate to the **Customer** icon:

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.



<u>Creating a New Customer</u>

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



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*.

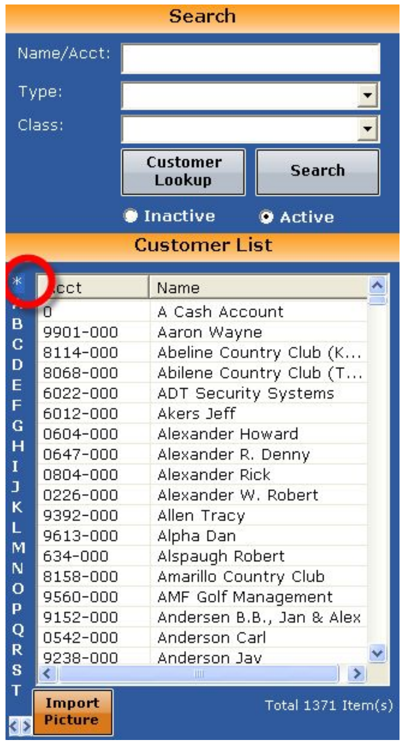
- *Customer Classes* are general categories that customers are placed in. For example, Members, Employees, and Kitchen Staff might need to be created for a restaurant. Customer Class is used for tiered pricing.
- *Customer Types* are categories that customers are placed into as part of a sub-class. For 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**.

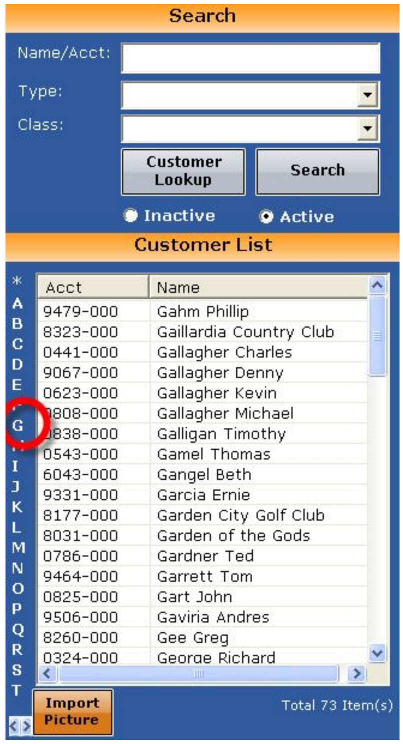
> **Note:** The ***Account#*** will automatically select the smallest number that has not been used yet. This can be manually entered by typing over it
>
> **Note:** If the system includes a card reader, swiping a driver's license at this time will fill in some of the information.
>
> **Note:** Check 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 (*)

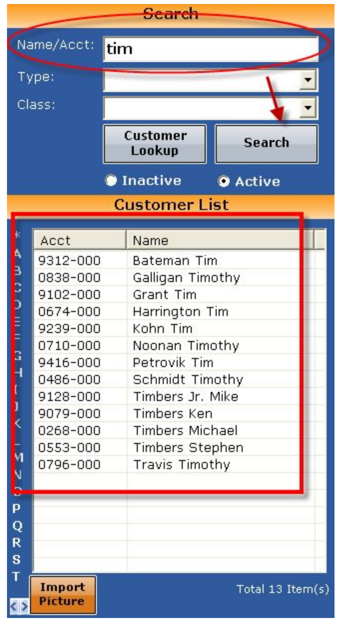


To search by last name, click the letter the last name begins with and the software will populate a list of all members whose last name starts with that letter.



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.



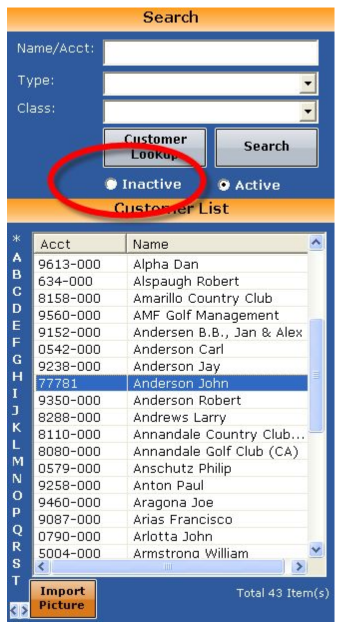
Searching can be narrowed down by selecting a ***Customer Type*** and/or ***Customer Class*** from the drop down menus, as well. These are the same types and classes that were created in *Options -> Reference Tables -> Customer Class & Customer Type.*

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.

CHAPTER 2

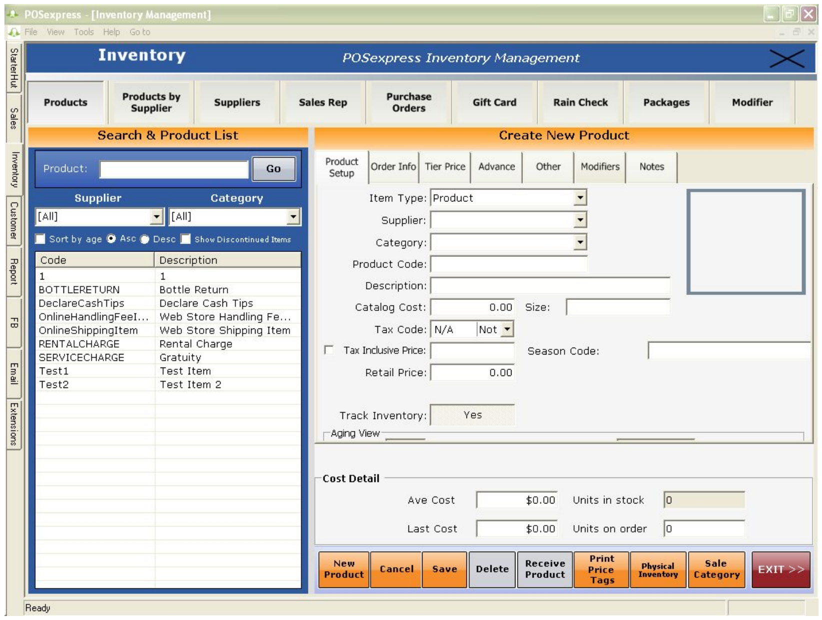
The Inventory Module

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 & 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.

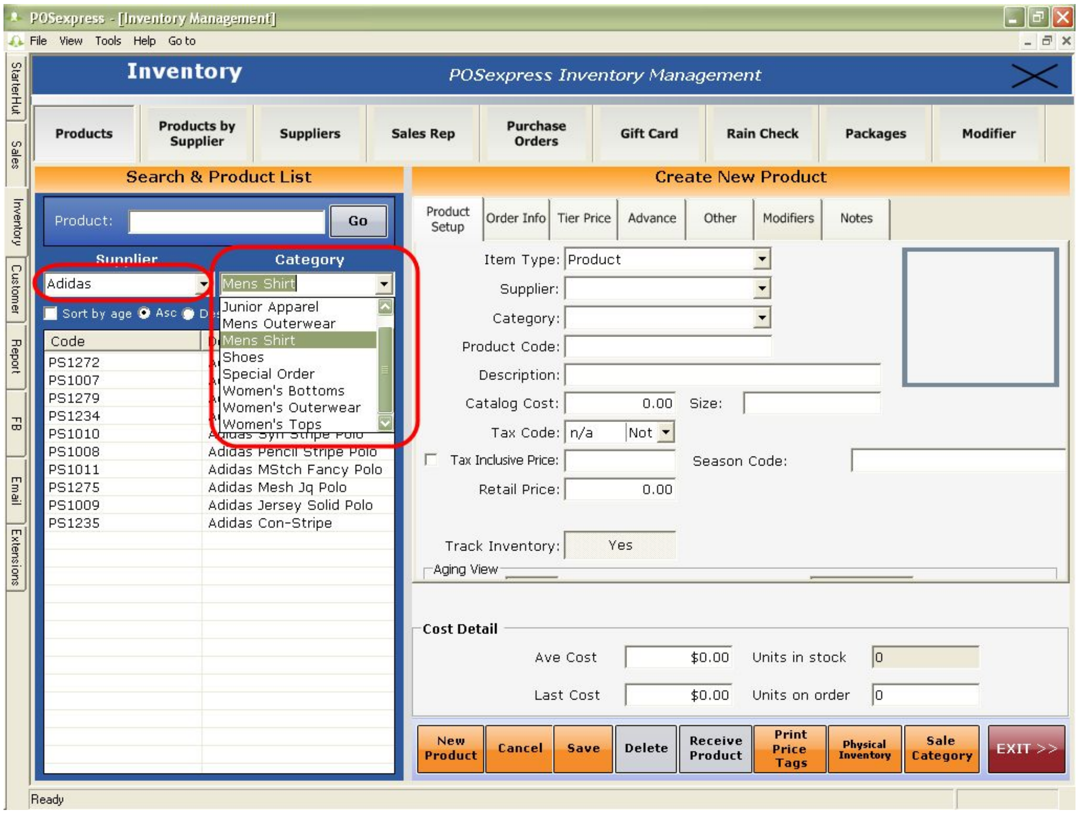


On this screen, there is a ***Search & Product List*** section. This section will display all items in inventory and are listed in Product Code order, ascending to descending. This order can be reversed by clicking the ***Code*** or ***Description*** heading at the top of their respective columns.

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)

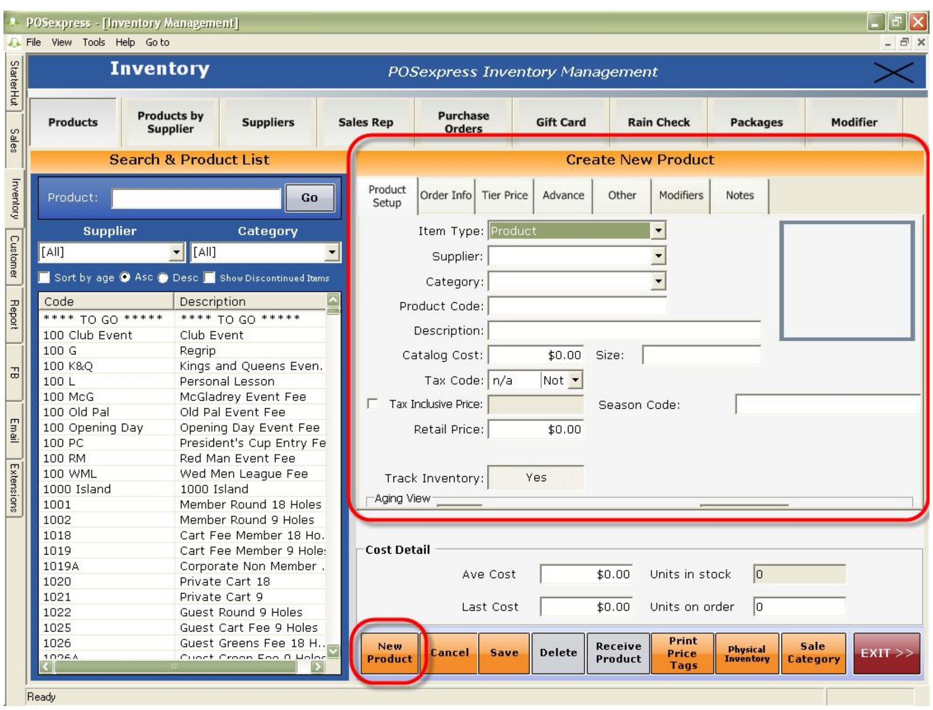

POSexpress - [Inventory Management]
File View Tools Help Go to
Inventory
POSexpress Inventory Management
Products
Products by Supplier
Suppliers
Sales Rep
Purchase Orders
Gift Card
Rain Check
Packages
Modifier
Search & Product List
Create New Product
Product:
Go
Supplier
Category
Adidas
Mens Shirt
Junior Apparel
Mens Outerwear
Mens Shirt
Shoes
Special Order
Women's Bottoms
Women's Outerwear
Women's Tops
Sort by age
Asc
Code
PS1272
PS1007
PS1279
PS1234
PS1010
PS1008 Adidas Pencil Stripe Polo
PS1011 Adidas MStch Fancy Polo
PS1275 Adidas Mesh Jq Polo
PS1009 Adidas Jersey Solid Polo
PS1235 Adidas Con-Stripe
Product Setup
Order Info
Tier Price
Advance
Other
Modifiers
Notes
Item Type: Product
Supplier:
Category:
Product Code:
Description:
Catalog Cost: 0.00
Size:
Tax Code: n/a Not
Tax Inclusive Price:
Season Code:
Retail Price: 0.00
Track Inventory: Yes
Aging View
Cost Detail
Ave Cost $0.00
Units in stock 0
Last Cost $0.00
Units on order 0
New Product
Cancel
Save
Delete
Receive Product
Print Price Tags
Physical Inventory
Sale Category
EXIT >>
Ready
StarterHut
Sales
Inventory
Customer
Report
FB
Email
Extensions

<u>Creating a New Inventory Item</u>

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.

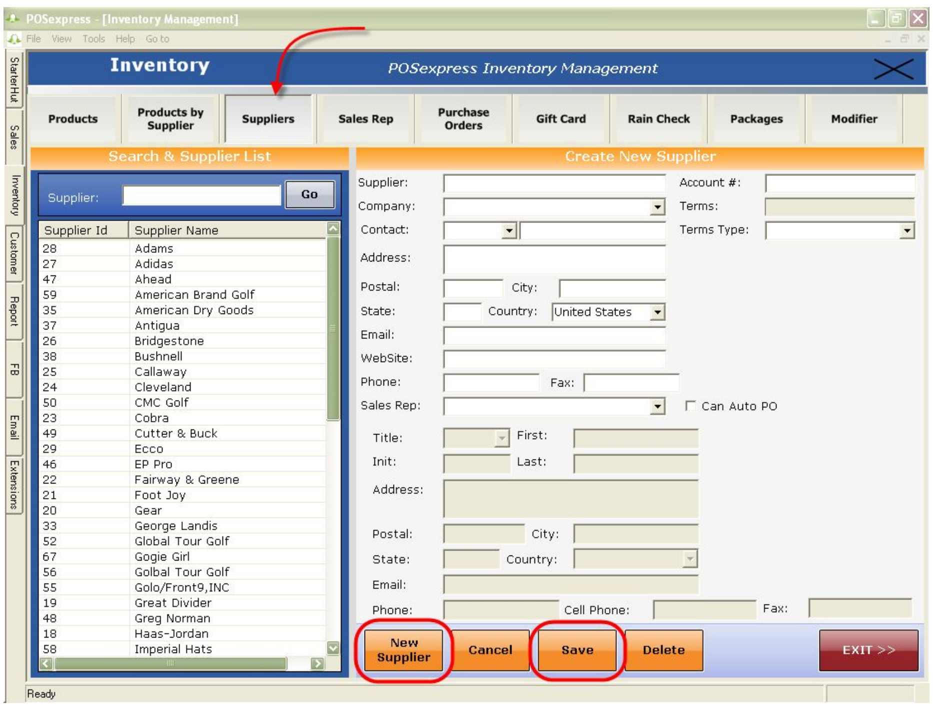
For most common inventory items, the ***Item Type*** will be ***Product***, as seen in the example below. This is the default setting when creating a new item. The other choices in the Item Type drop down menu will be explained in separate documents.



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.

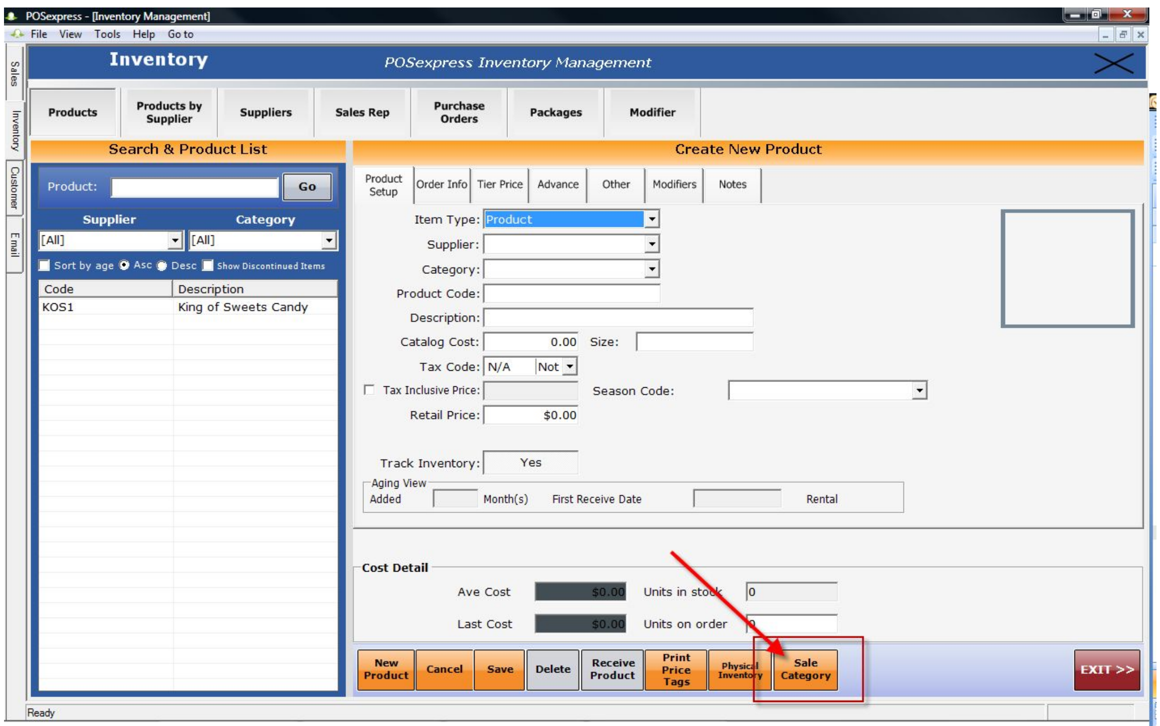


If a supplier's information changes, it should be edited in POSExpress. To edit a supplier's information, first locate the supplier in the ***Search & Supplier List***. Then, make any necessary changes and select ***Save***.

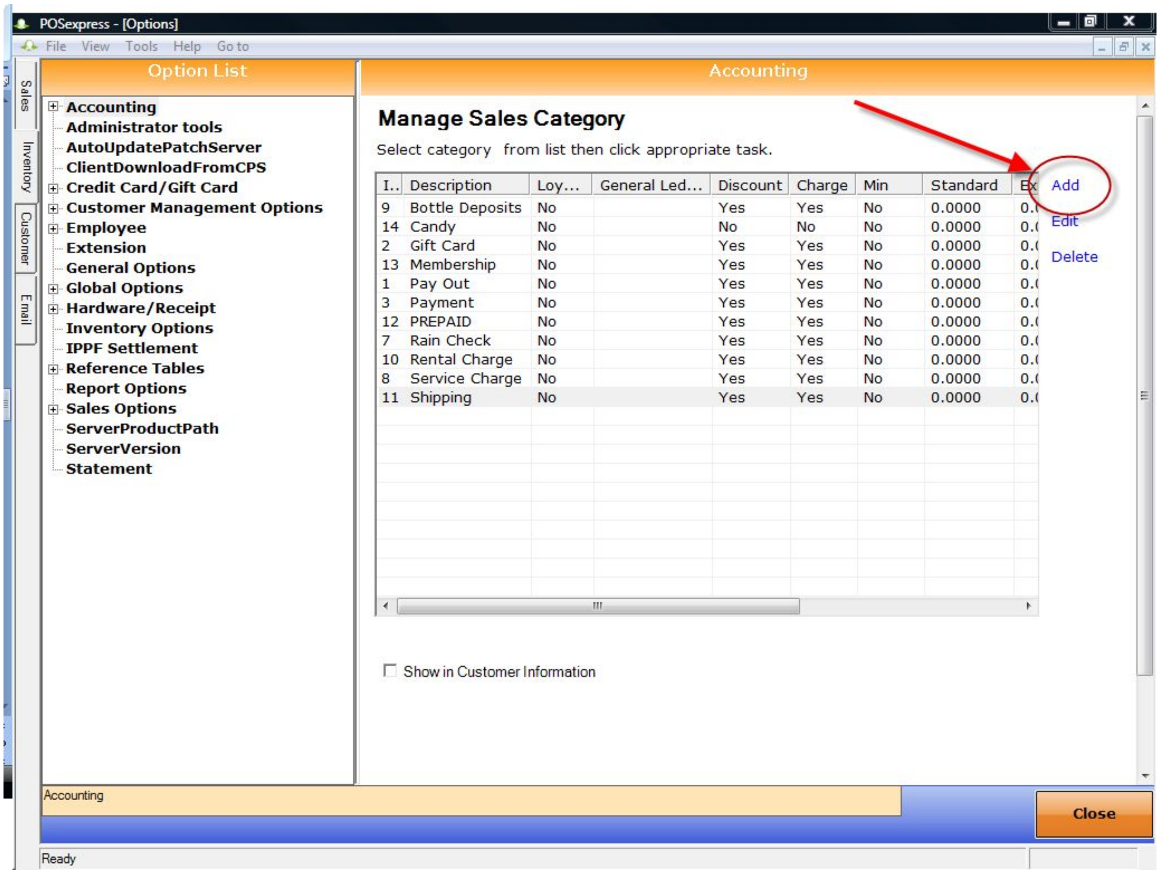
Creating a New Sales Category

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.

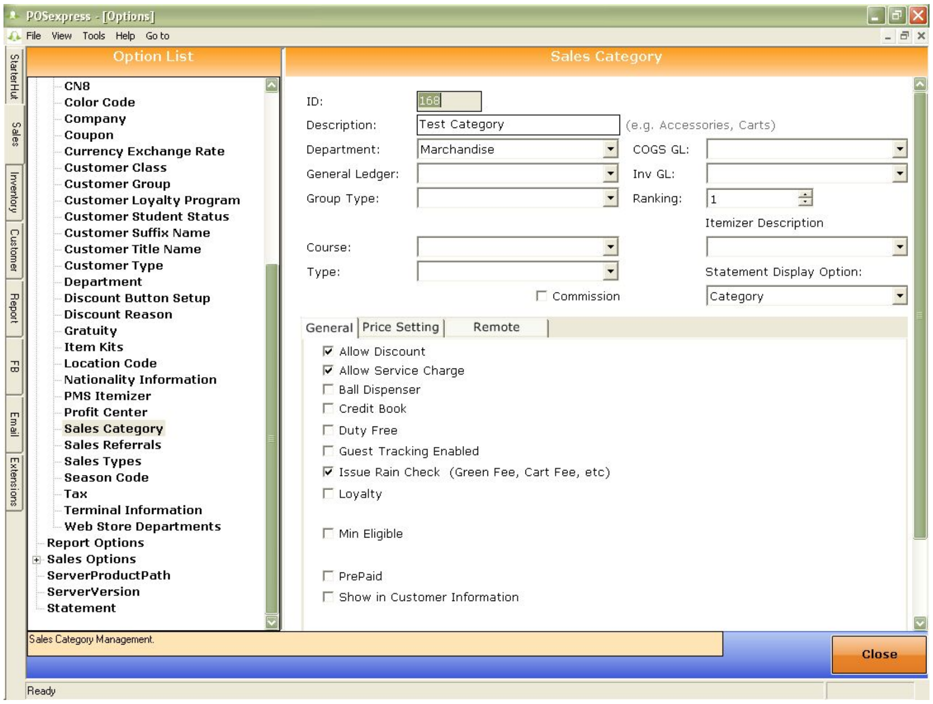


Select ***Add***



I..	Description	Loy...	General Led...	Discount	Charge	Min	Standard	Ex
9	Bottle Deposits	No		Yes	Yes	No	0.0000	0.(
14	Candy	No		No	No	No	0.0000	0.(
2	Gift Card	No		Yes	Yes	No	0.0000	0.(
13	Membership	No		Yes	Yes	No	0.0000	0.(
1	Pay Out	No		Yes	Yes	No	0.0000	0.(
3	Payment	No		Yes	Yes	No	0.0000	0.(
12	PREPAID	No		Yes	Yes	No	0.0000	0.(
7	Rain Check	No		Yes	Yes	No	0.0000	0.(
10	Rental Charge	No		Yes	Yes	No	0.0000	0.(
8	Service Charge	No		Yes	Yes	No	0.0000	0.(
11	Shipping	No		Yes	Yes	No	0.0000	0.(

The screen shown below will be displayed.


POSexpress - [Options]
File View Tools Help Go to
StarterHub
Sales
Inventory
Customer
Report
FB
Email
Extensions
Option List
CN8
Color Code
Company
Coupon
Currency Exchange Rate
Customer Class
Customer Group
Customer Loyalty Program
Customer Student Status
Customer Suffix Name
Customer Title Name
Customer Type
Department
Discount Button Setup
Discount Reason
Gratuity
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
Sales Options
ServerProductPath
ServerVersion
Statement
Sales Category
ID:
168
Description:
Test Category
(e.g. Accessories, Carts)
Department:
Marchandise
COGS GL:
General Ledger:
Inv GL:
Group Type:
Ranking:
1
Itemizer Description
Course:
Type:
Statement Display Option:
Commission
Category
General
Price Setting
Remote
Allow Discount
Allow Service Charge
Ball Dispenser
Credit Book
Duty Free
Guest Tracking Enabled
Issue Rain Check (Green Fee, Cart Fee, etc)
Loyalty
Min Eligible
PrePaid
Show in Customer Information
Sales Category Management.
Close
Ready

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.

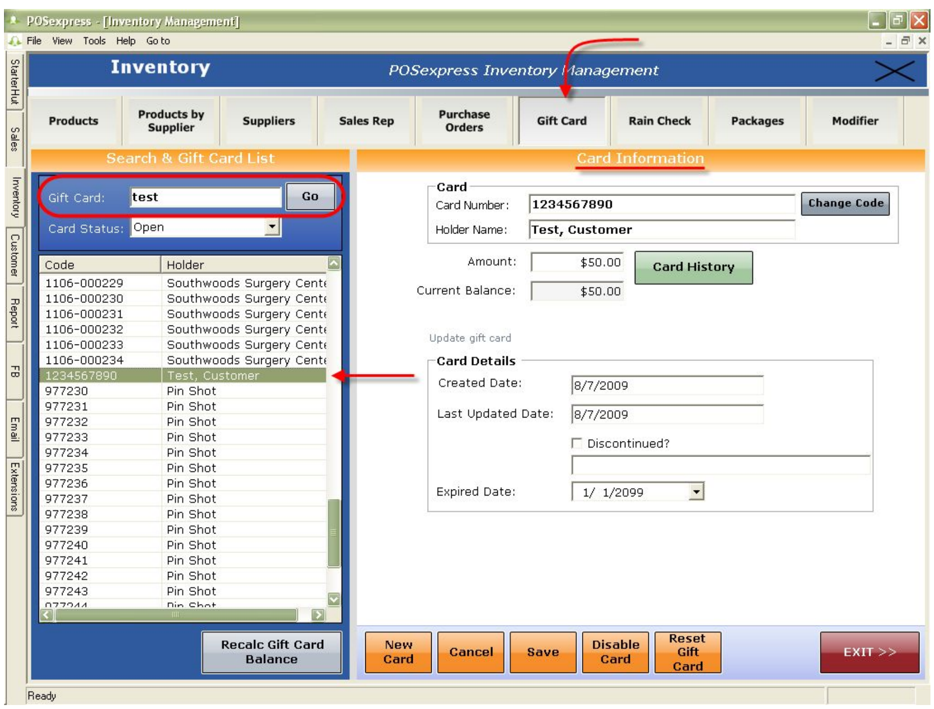
  ****Both options, Yes and No, enable the user to retrieve sales information. This option is specifically for physical inventory purposes only*****

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

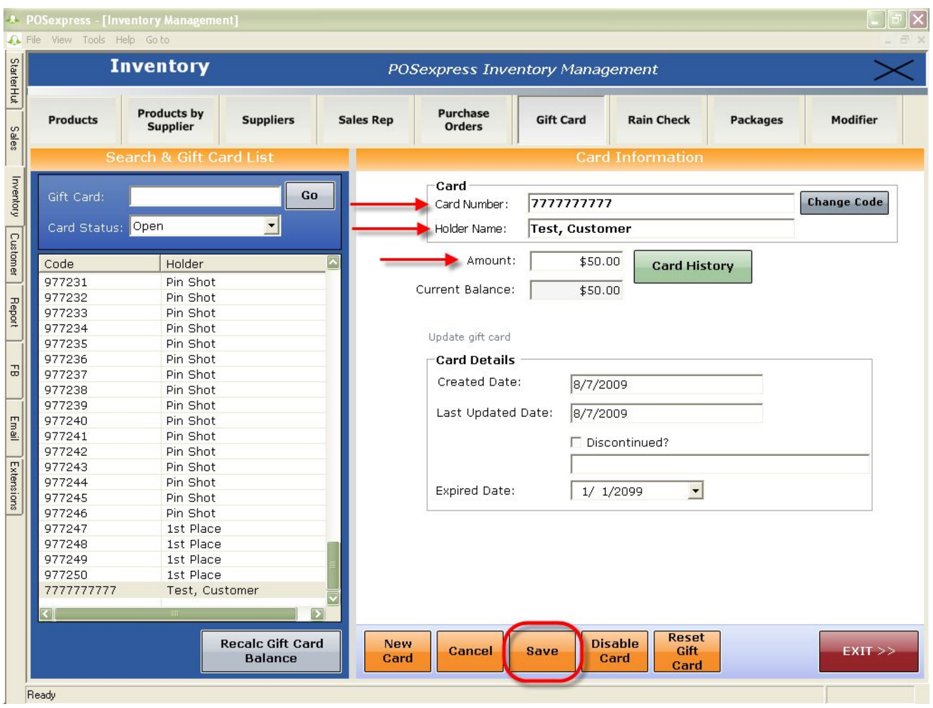
To search for a gift card, enter the gift card number or the name to whom the card was issued into the ***Search & Gift Card List***. When the card appears in the list, select it. The details associated with that card will be displayed in the ***Card Information*** window. See example below.



<u>Creating a New Card Using the Gift Card Window</u>

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***.

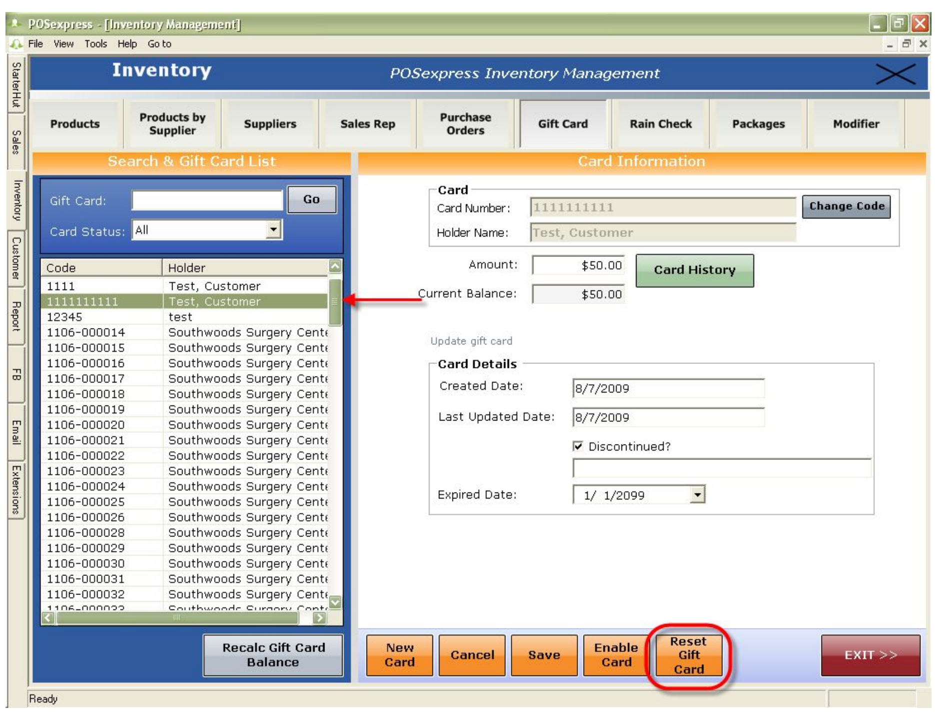


Resetting a Gift Card

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.

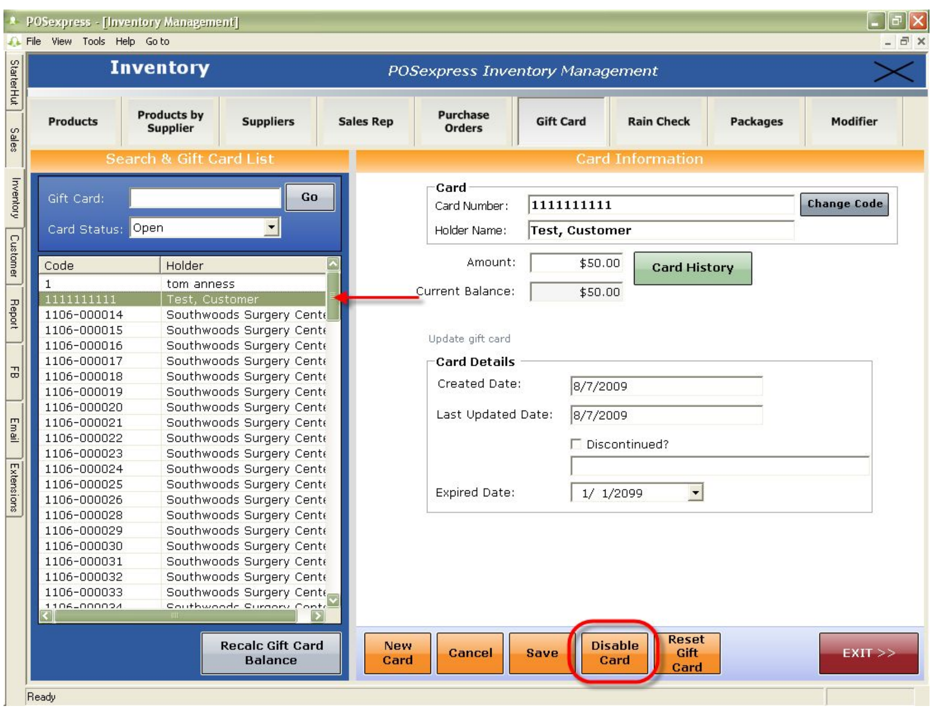


Disabling / Enabling a Gift Card

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.

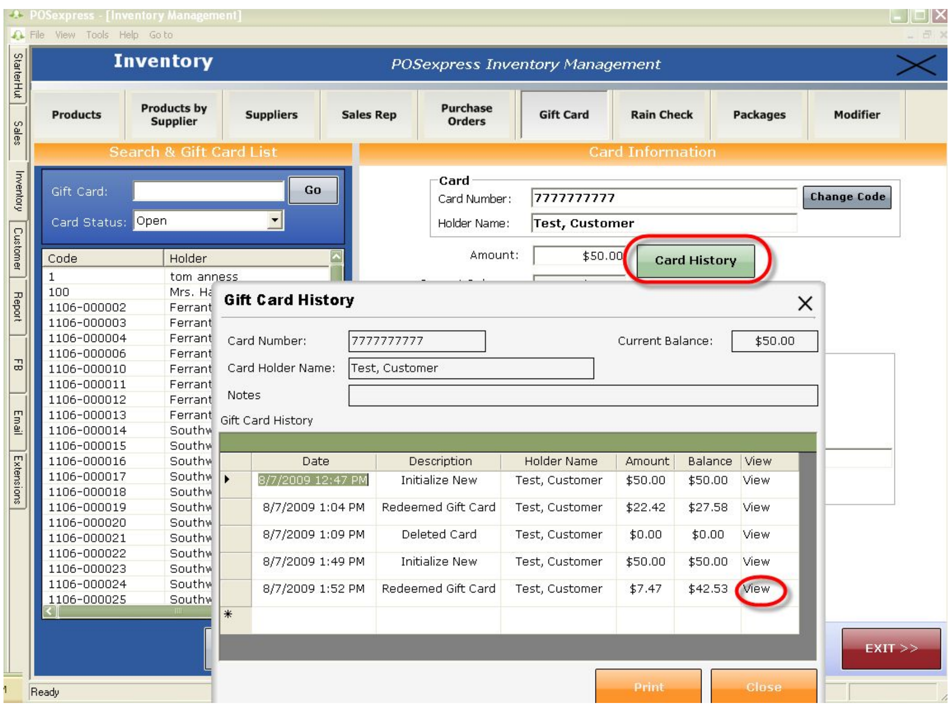
To view the disabled card, select ***Discontinued*** from the ***Card Status*** drop down menu in the ***Search & Gift Card List***. To enable the gift card again, select the card in the ***Search & Gift Card List*** and select the ***Enable Card*** button. The ***Enable Card*** button will take the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



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***.

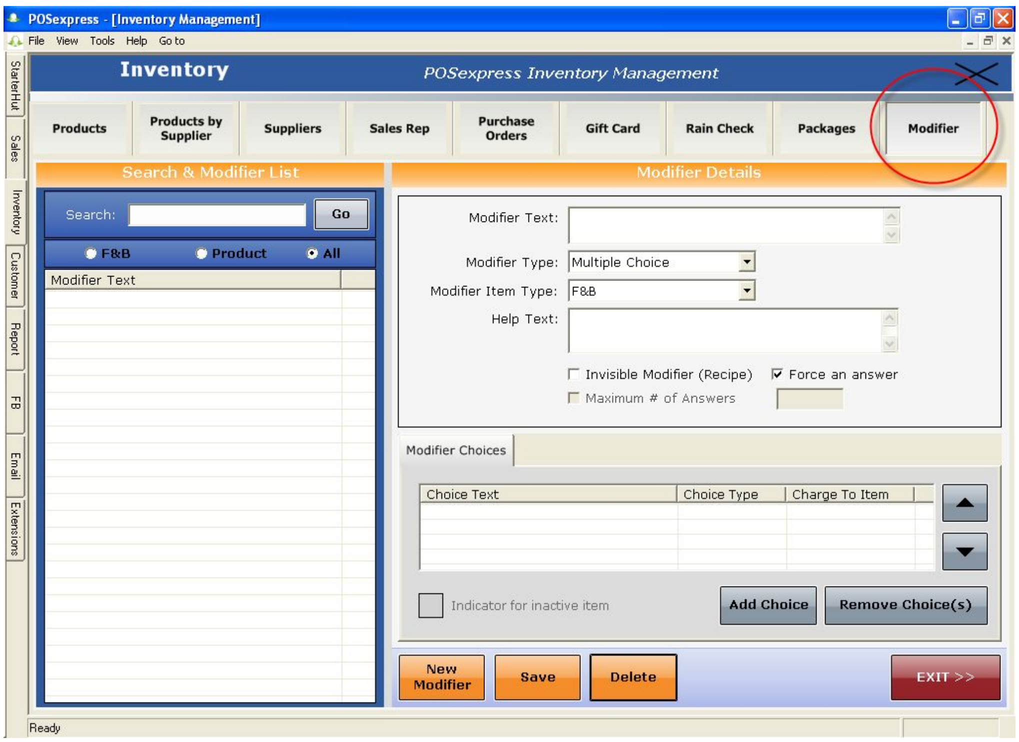
Select the ***Card History*** button and the ***Gift Card History*** window will appear. This will display the card holder name, number, balance, and a list of transactions for the card. To view a specific transaction in the list, select ***View***. This will open a Sale Look Up window that contains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



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.

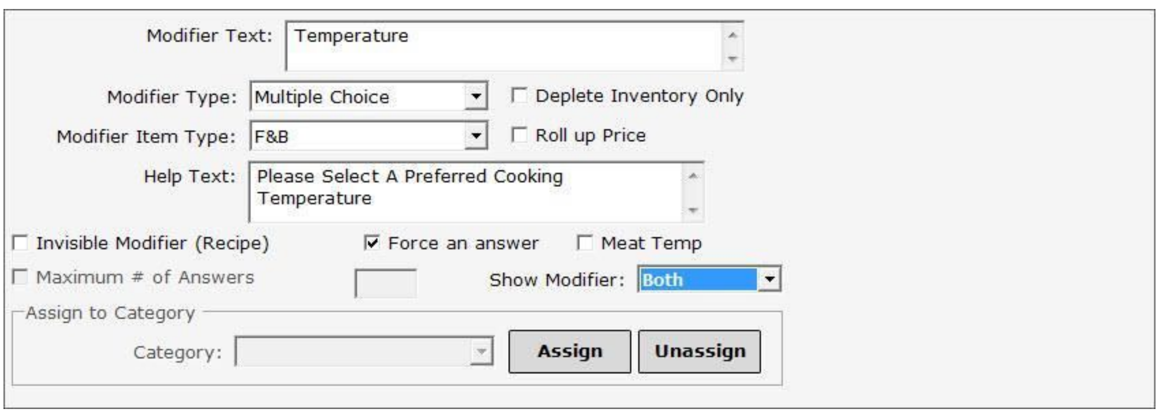


In the following example, a Modifier for temperature, rare – well, will be created.
In the ***Modifier Text*** field, enter the name of the Modifier that is being created. Example: Temperature.

- 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

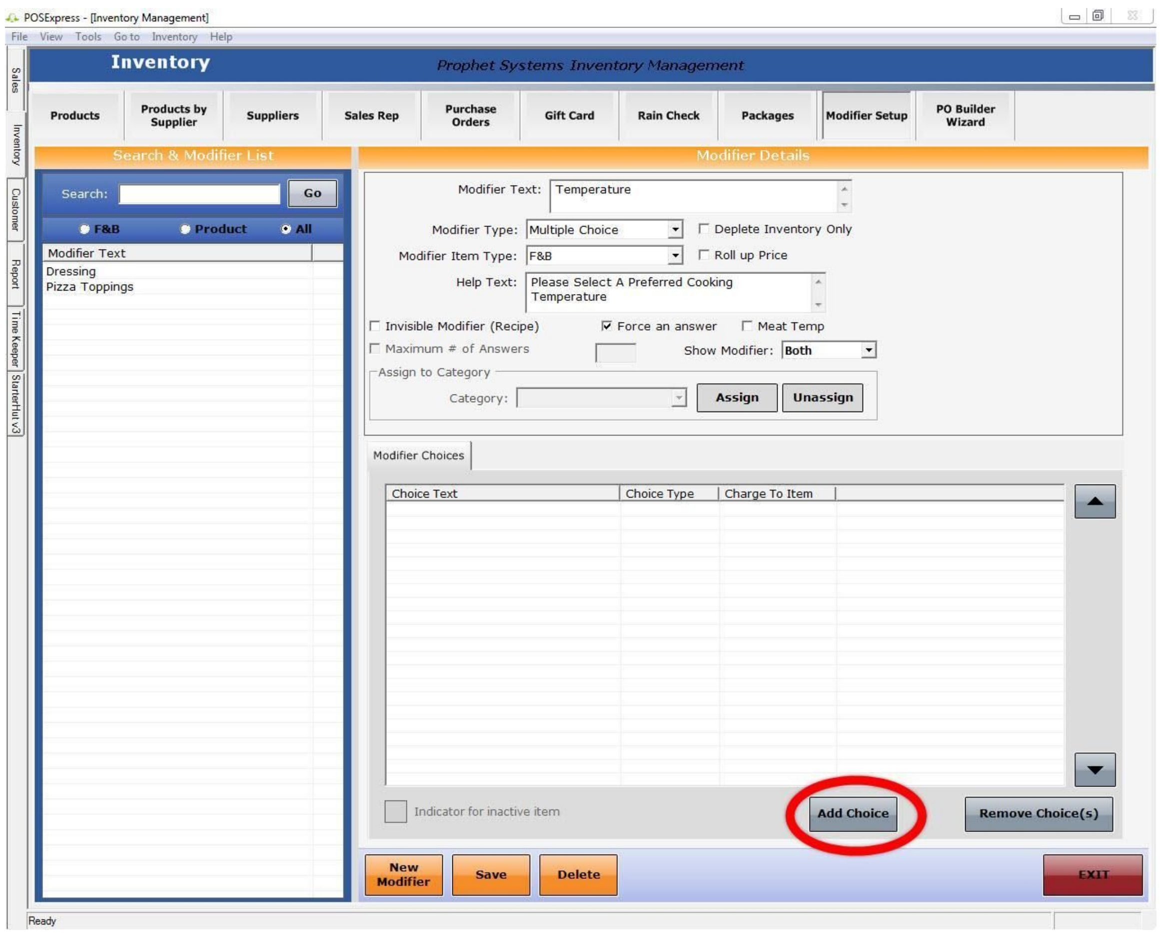
   - *Check List* – selects **multiple** from list provided (ex: no tomato, no onion, no lettuce, etc.)
   - *Text* – requires the user to type in instruction (ex: special requests)
   - *Pizza Toppings* – creates list of toppings that can be applied to each side of a pizza, the whole pizza and/or extra 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.

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.

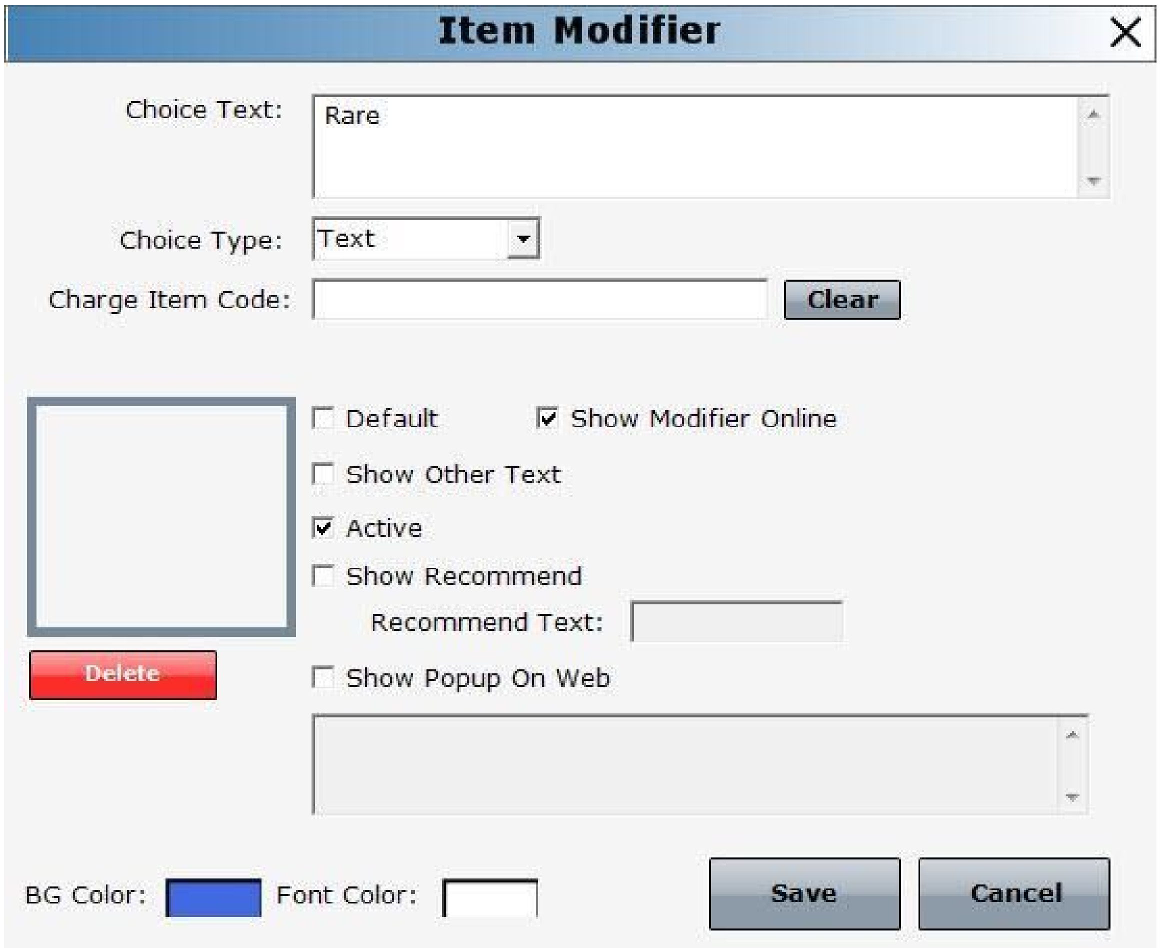


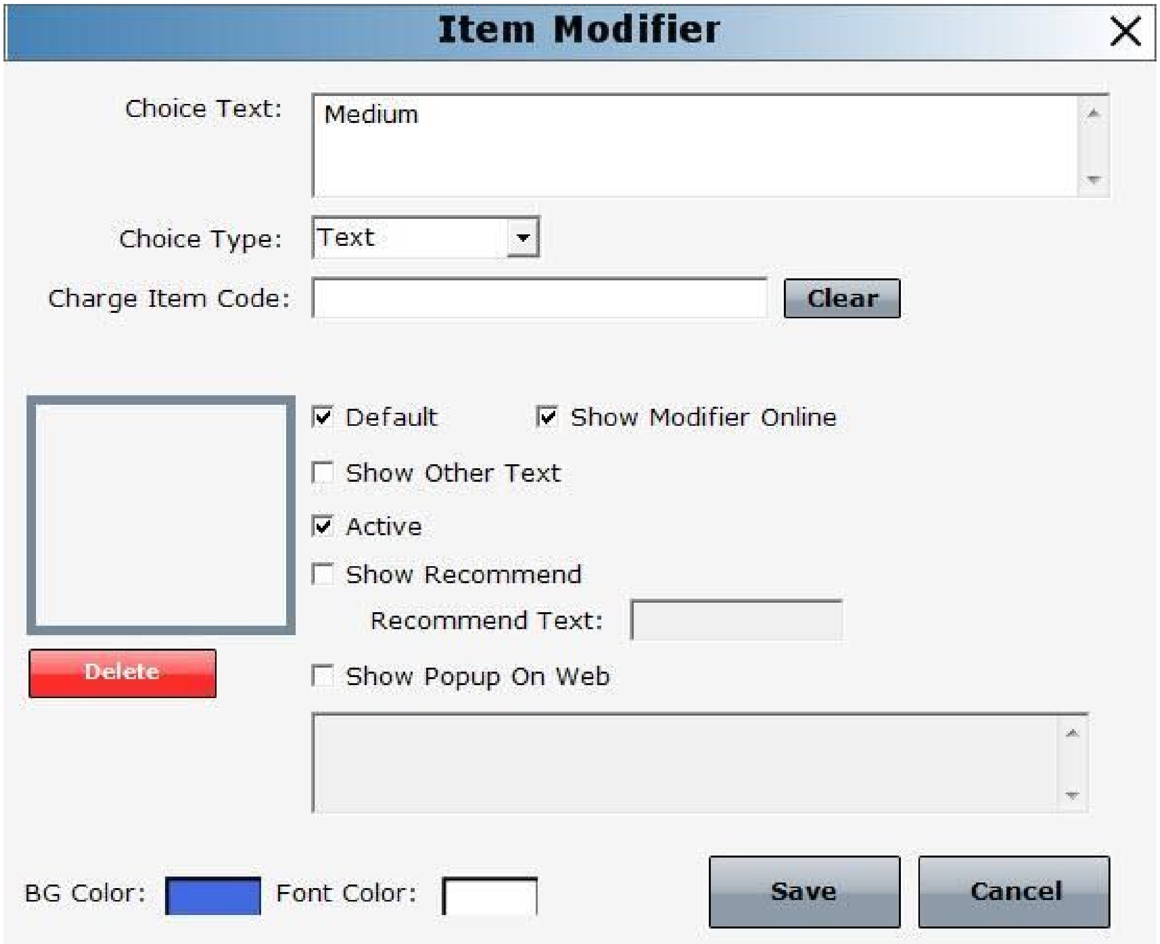
- Select the ***Add Choice*** button located at the bottom of the Modifier page.
- A dialogue box will appear. Enter a choice for the specific modifier in the ***Choice Text*** field. In the example provided below, "rare" was used.
- Select the ***Choice Type*** drop down to assign what type of choice 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.

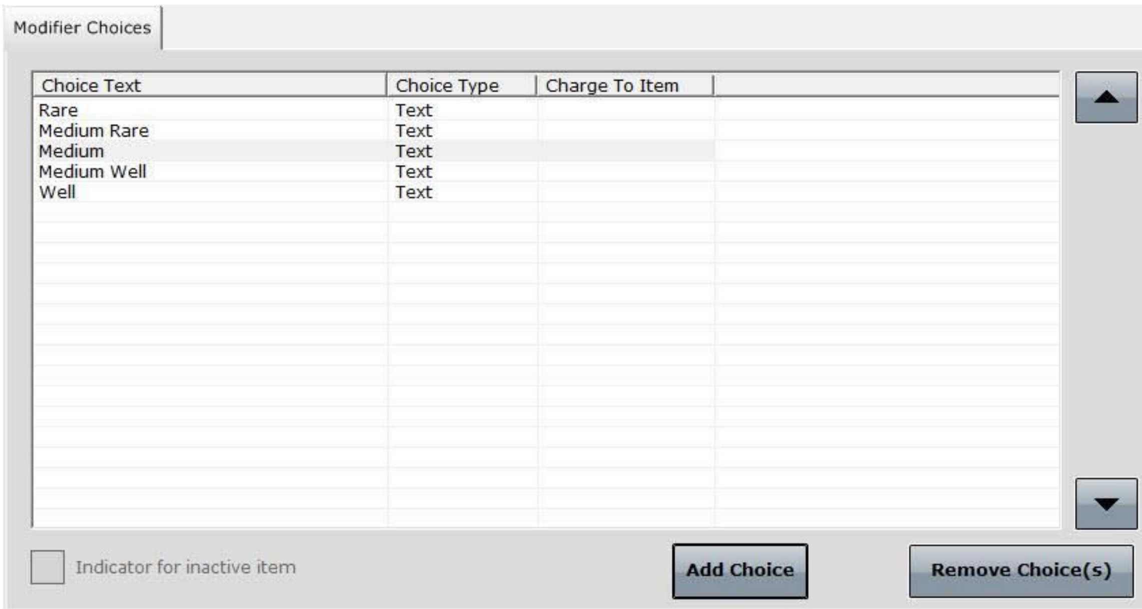
  - For example, if an item called "American Cheese" exists in inventory with an item code of "AMCH" and a price 50 cents, selecting AMCH in this field will charge 50 cents when this modifier is selected.

- 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:
Text
Charge Item Code:
Clear
Default
Show Modifier Online
Show Other Text
Active
Show Recommend
Recommend Text:
Show Popup On Web
Delete
BG Color:
Font Color:
Save
Cancel

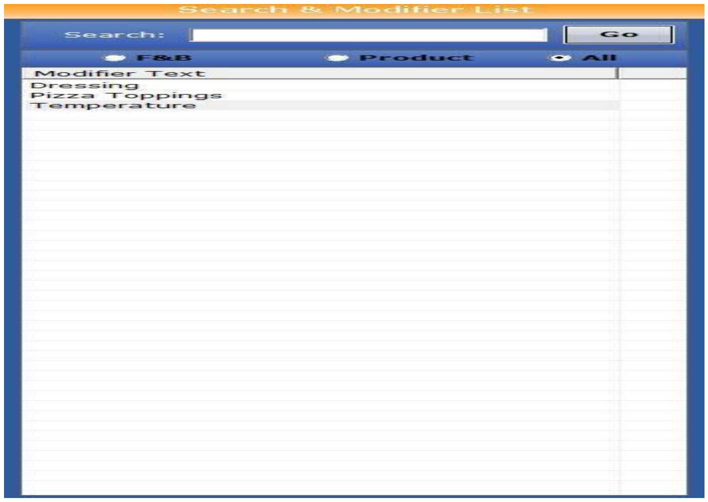

Item Modifier
Choice Text:
Medium
Choice Type:
Text
Charge Item Code:
Clear
Default
Show Modifier Online
Show Other Text
Active
Show Recommend
Recommend Text:
Delete
Show Popup On Web
BG Color:
Font Color:
Save
Cancel

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



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.

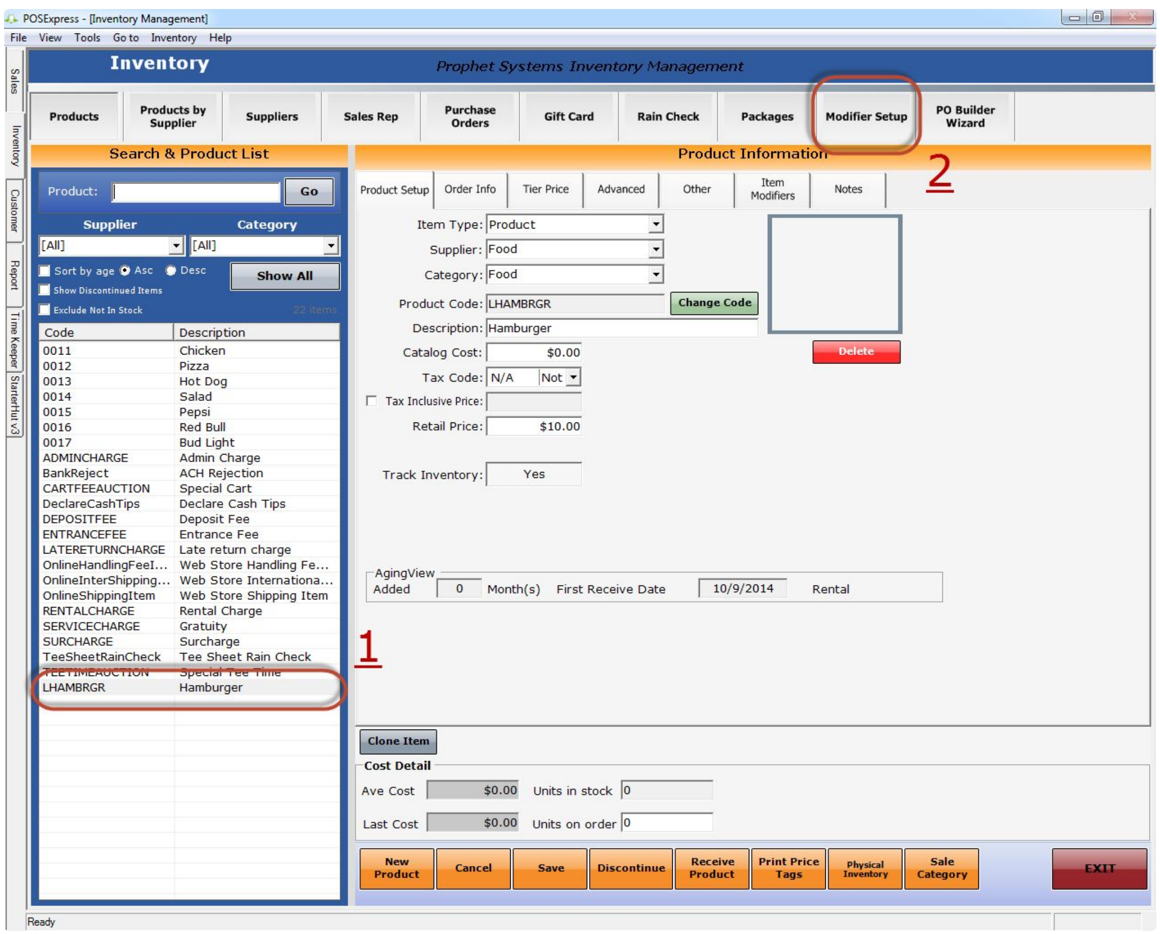
Select ***Save*** at the bottom of the screen, the Modifier appears in the Modifier list.


Search & Modifier List
Search:
Go
F&B
Product
All
Modifier Text
Dressing
Pizza Toppings
Temperature

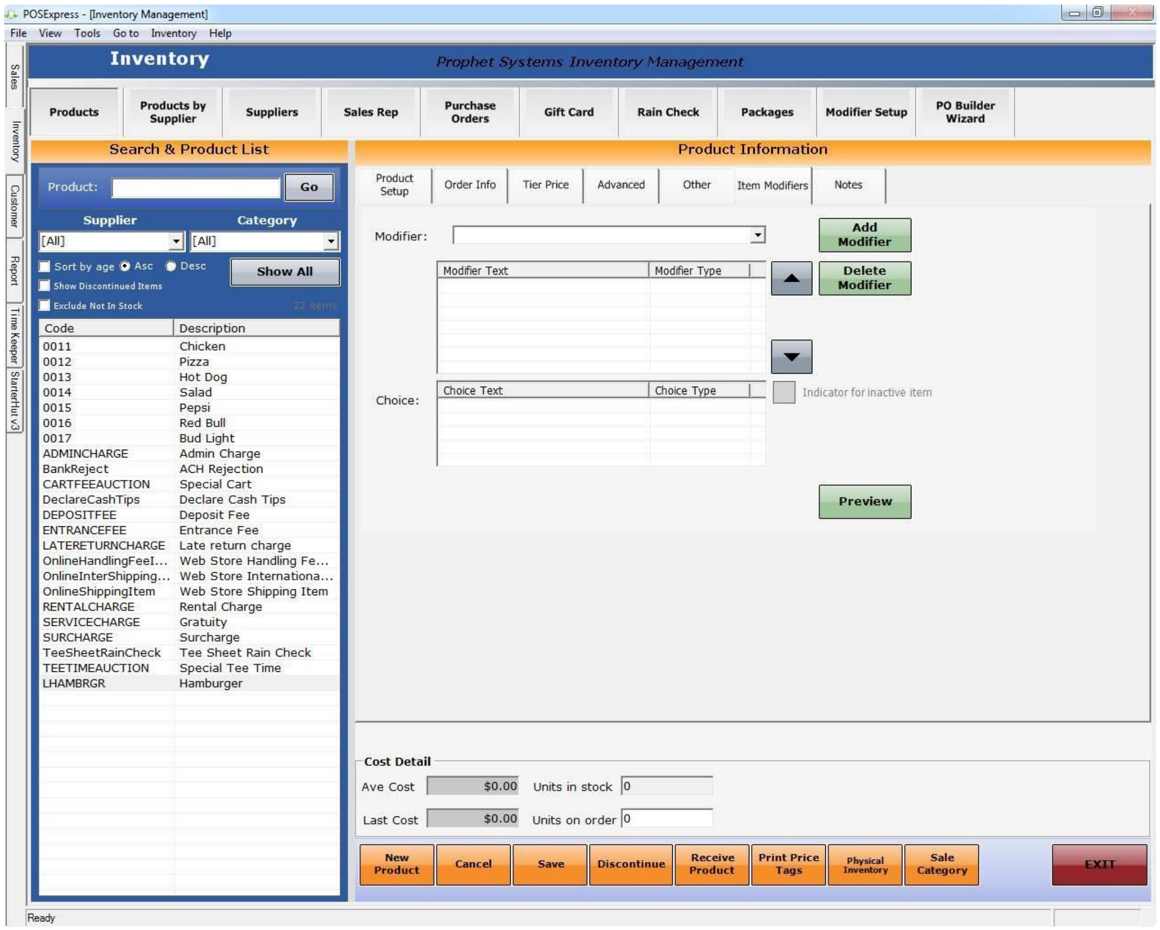
Linking a Modifier to an Inventory Item

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.

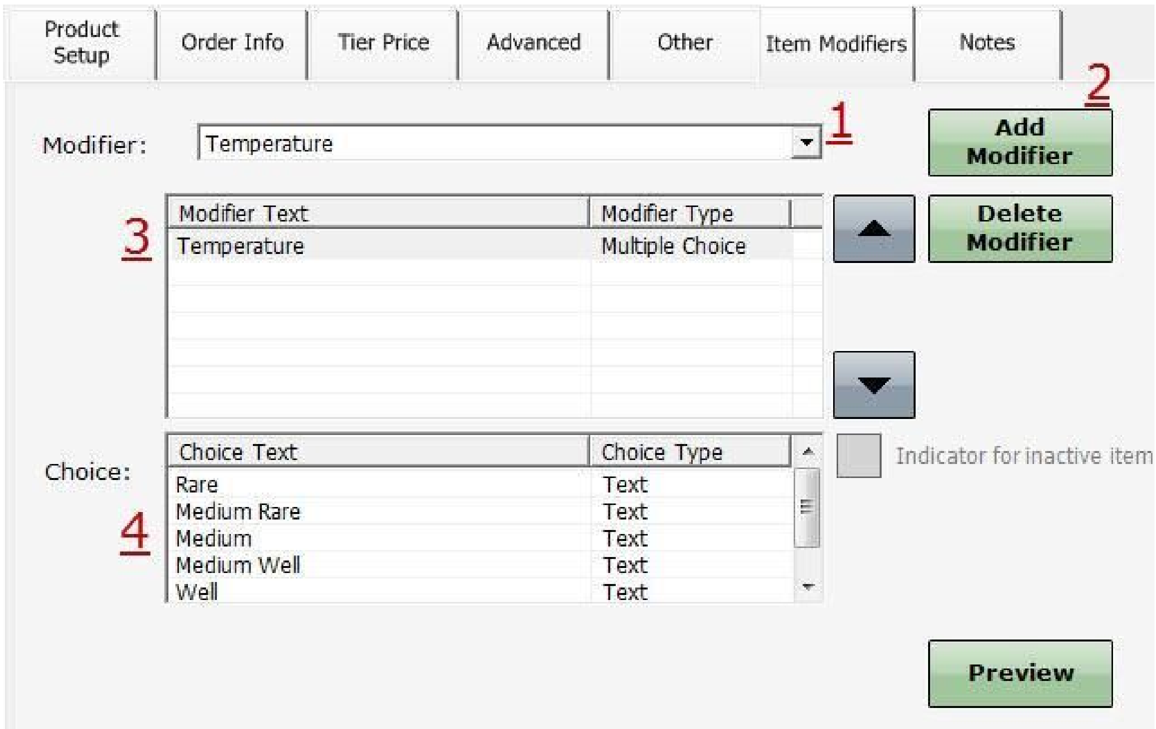
First, Select the Inventory module from the main screen. ***The Search & Product List*** will be displayed. Scroll or search through the list of products and select an item that will use a modifier. In the Example below, the product Hamburger, product code LHAMBRGR, is chosen. Once that product is selected,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



This will open the Modifier screen, pictured below:



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



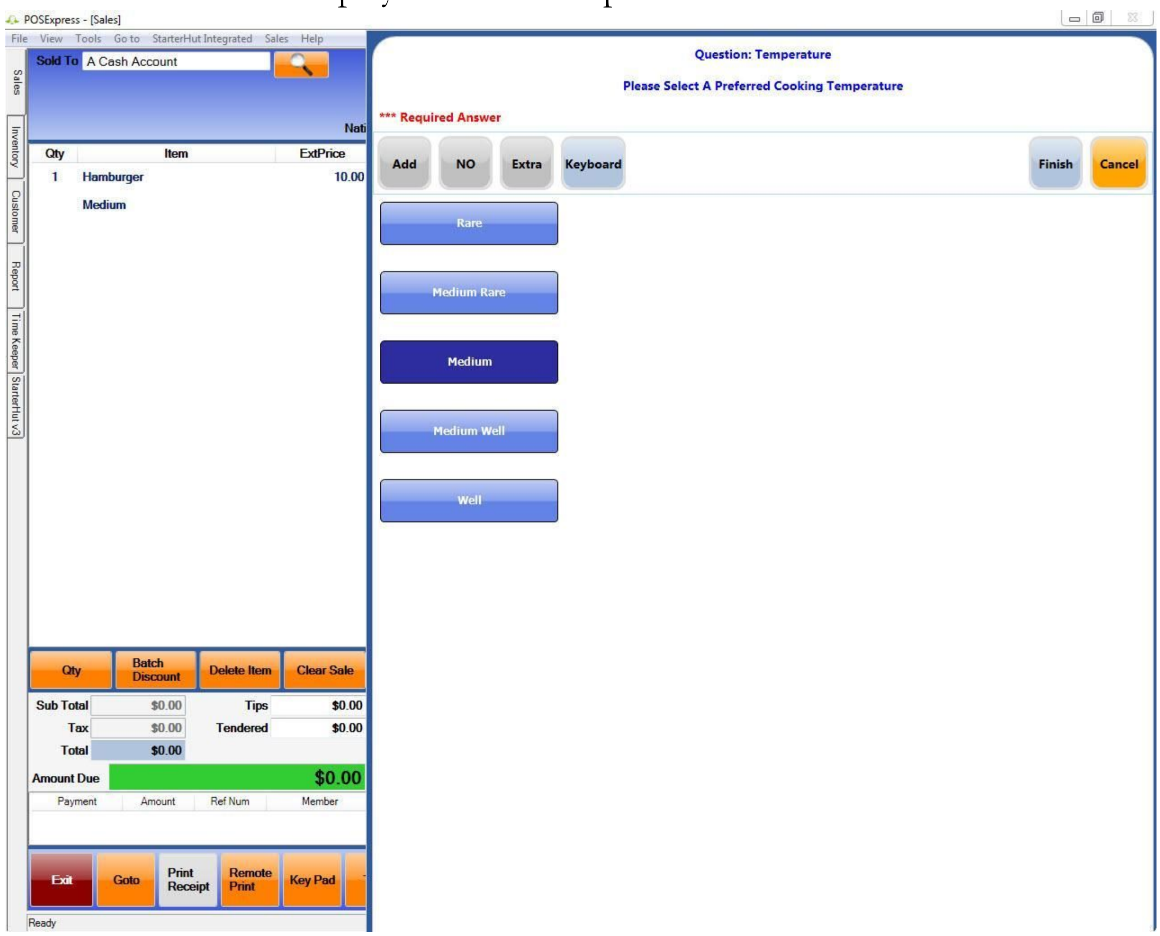
- The Modifier drop down box will contain a list of all the Modifiers that have been created. Select the desired Modifier for this item (**#1 above**). The Temperature Modifier was selected for the Hamburger item.
- After selecting the desired Modifier, select ***Add Modifier*** (**#2 above**) and the 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

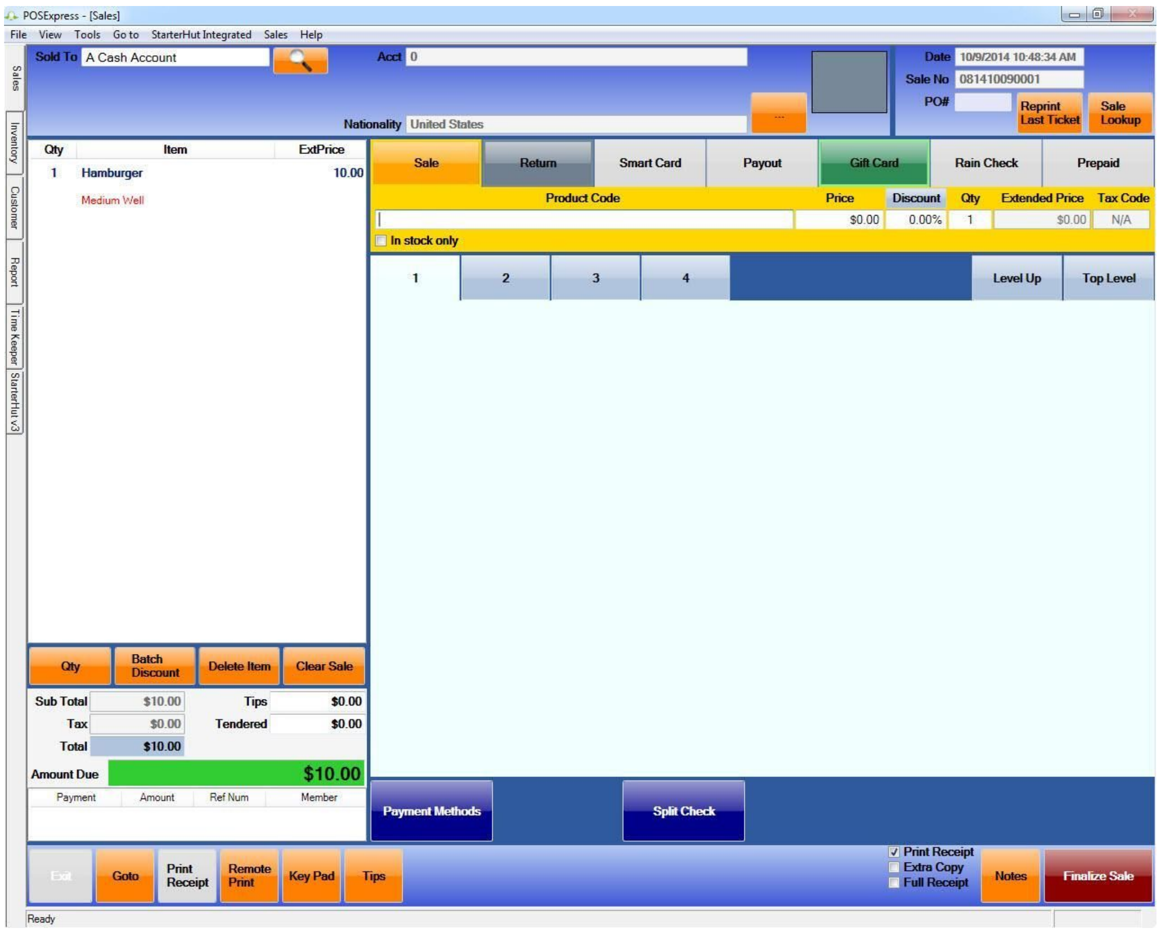
After creating and saving the Modifiers, exit the Inventory Module and navigate to the Sales screen.

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.

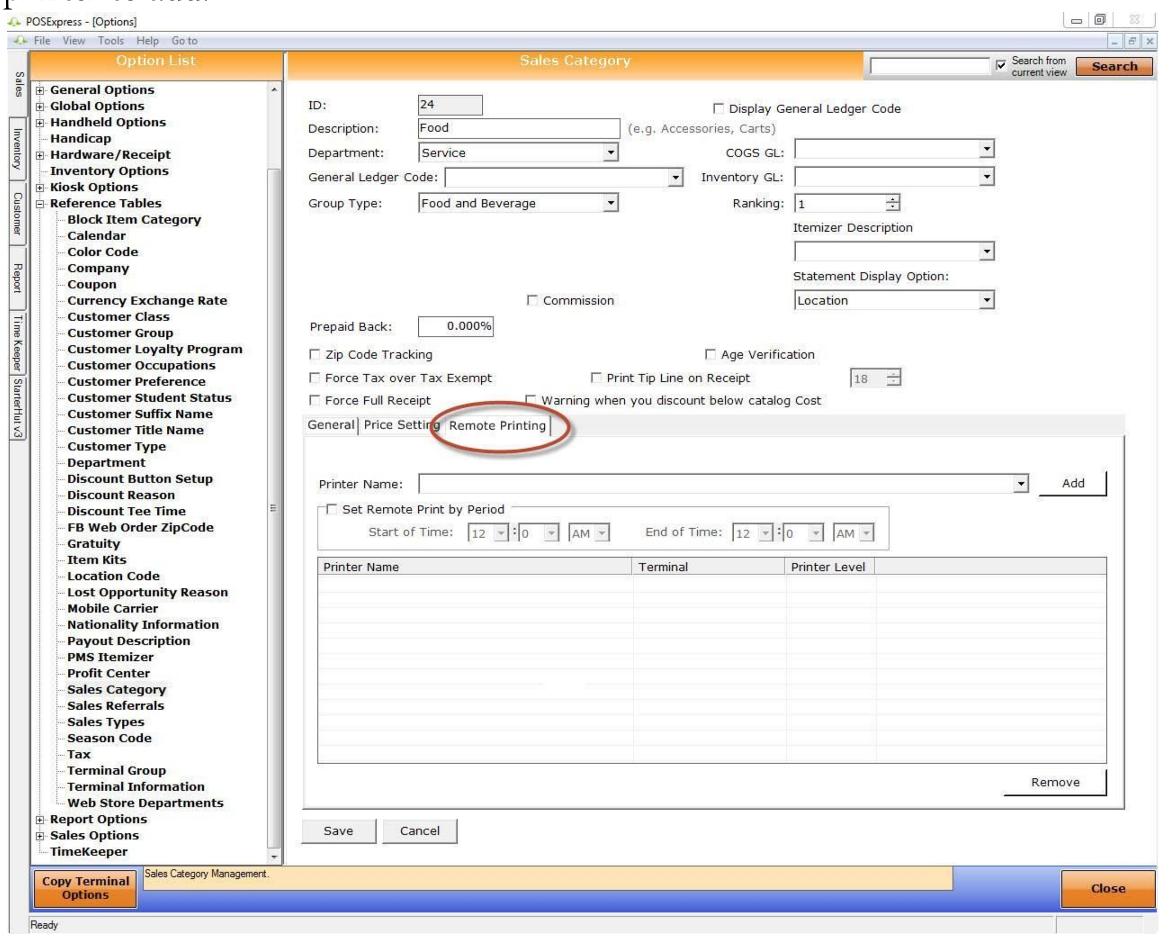


- **Note:** If more than one Modifier is assigned to a product, select "Next" to move to the next Modifier and its options.

Remote Printing

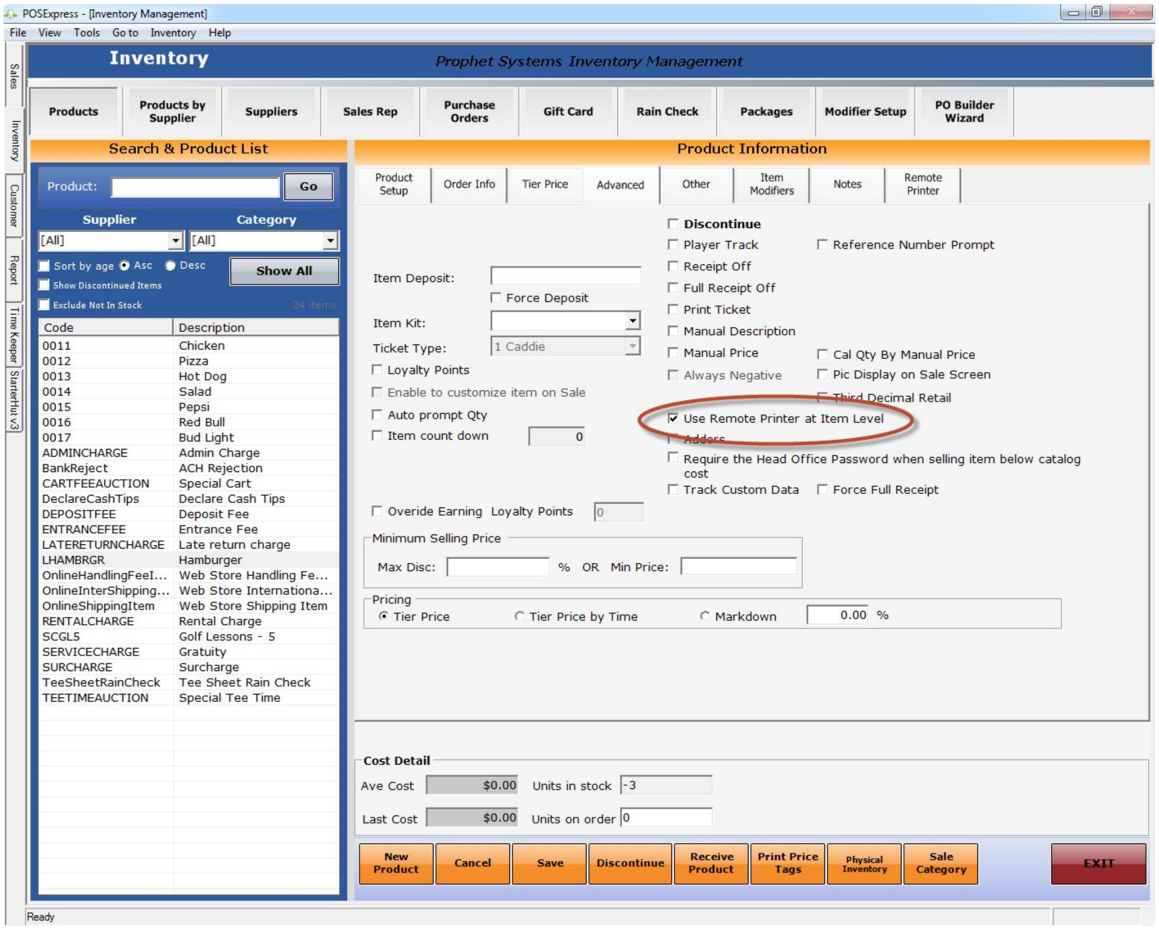
We can set up remote printing 2 ways either by Sales Category or per item at the item level

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.



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

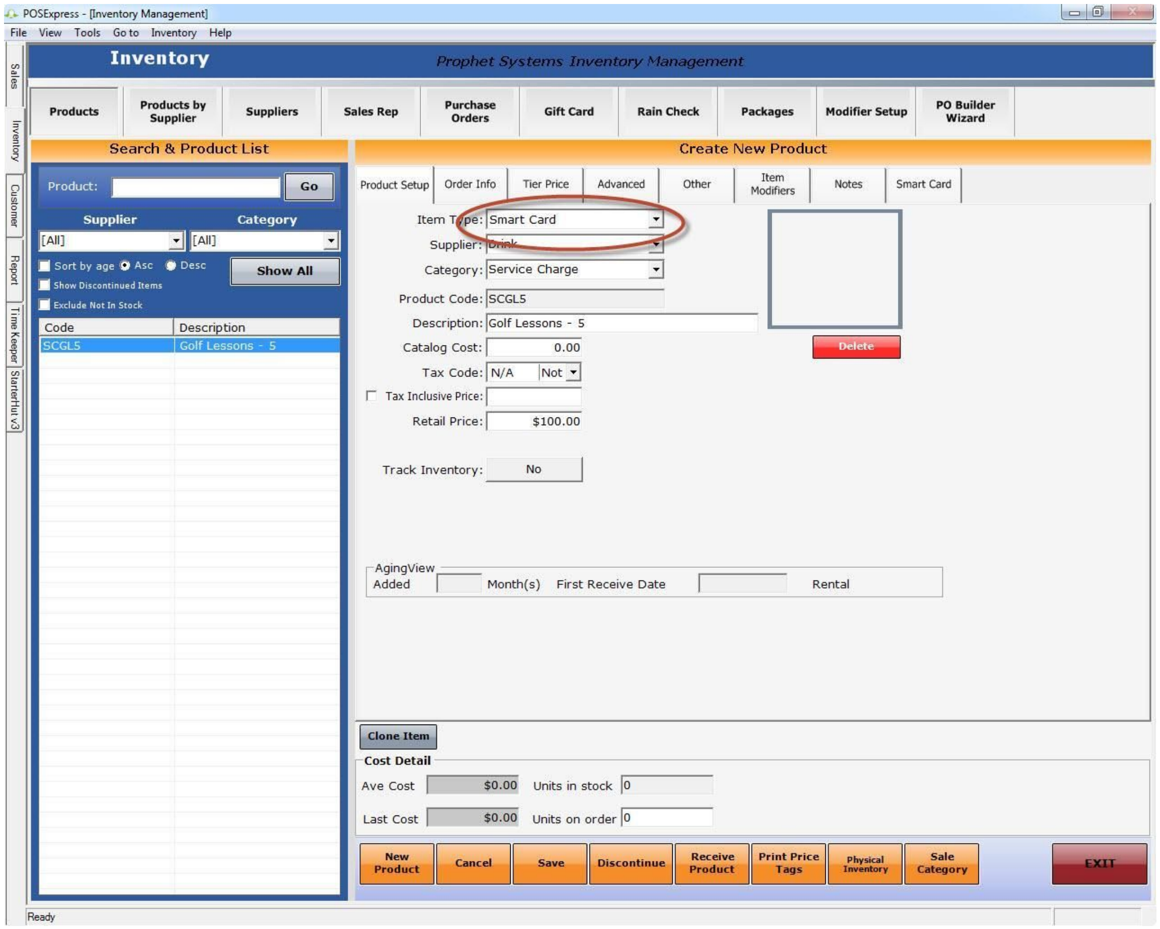


Smart Cards

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.

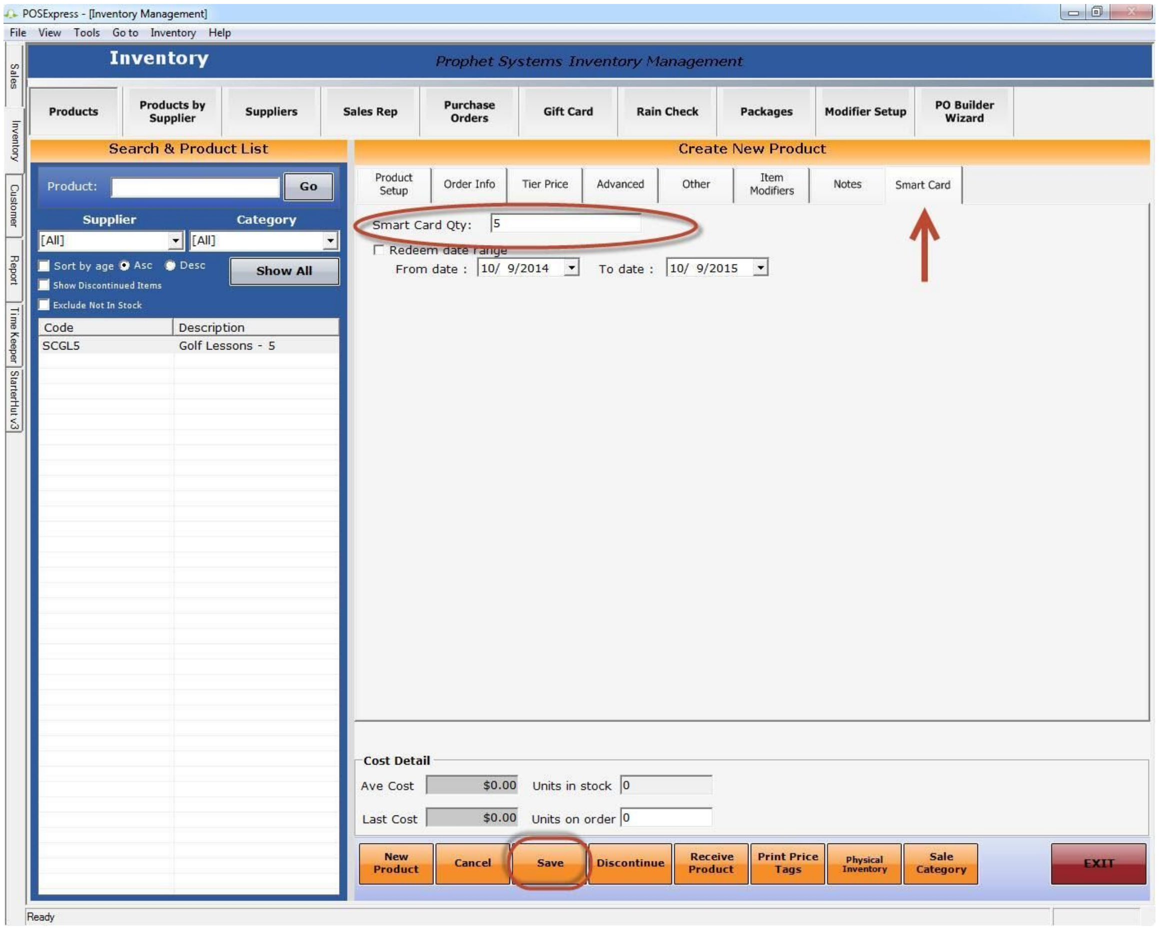
Creating a Smart Card Inventory Item

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.



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***.

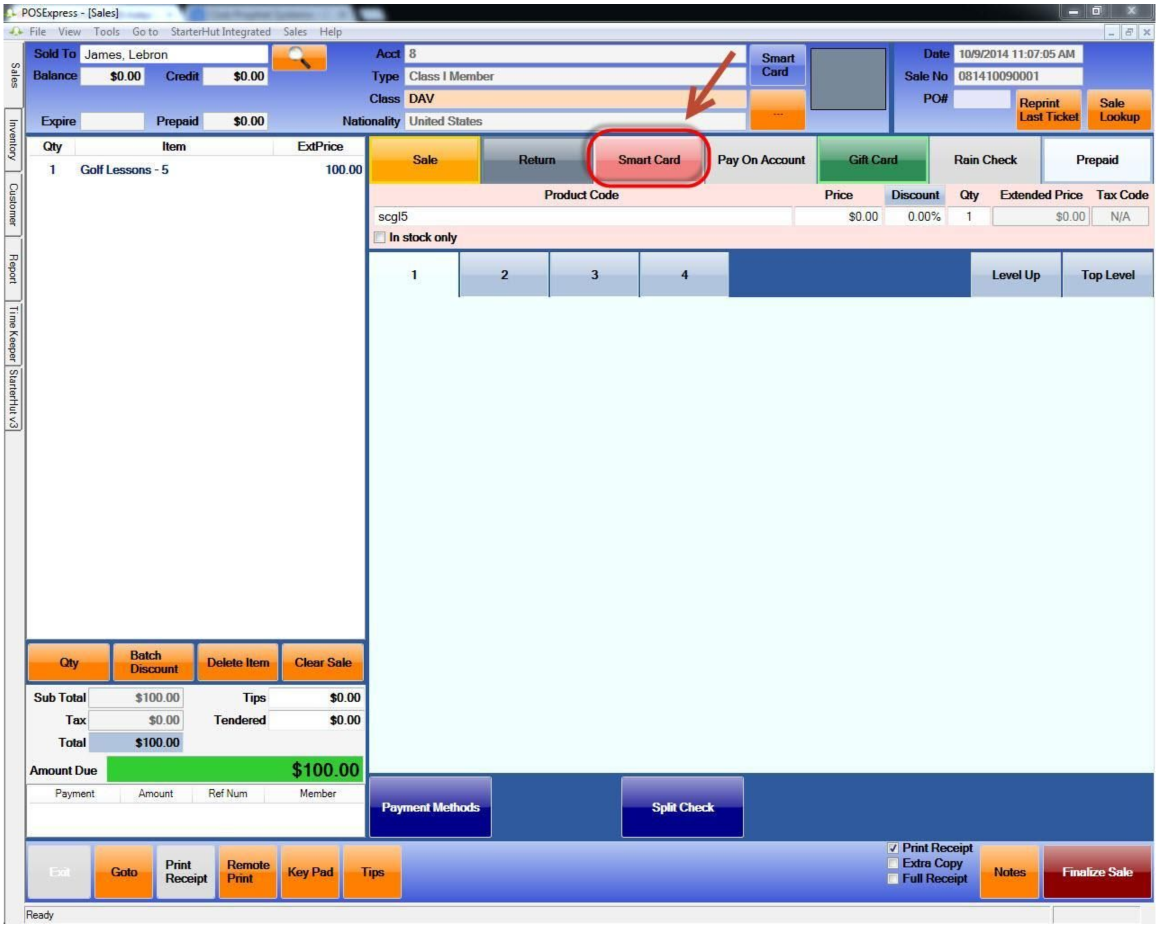
In the example below, 5 was entered because the product that was created is a bundle of 5 golf lessons. Remember, the price entered in the previous step was the price for 4 lessons. This is how the customer will receive 5 of these items for the price of 4.


POSExpress - [Inventory Management]
File View Tools Go to Inventory Help
Inventory
Prophet Systems Inventory Management
Products
Products by Supplier
Suppliers
Sales Rep
Purchase Orders
Gift Card
Rain Check
Packages
Modifier Setup
PO Builder Wizard
Search & Product List
Product:
Go
Supplier
Category
Sort by age Asc Desc
Show All
Show Discontinued Items
Exclude Not In Stock
Code
Description
SCGL5
Golf Lessons - 5
Create New Product
Product Setup
Order Info
Tier Price
Advanced
Other
Item Modifiers
Notes
Smart Card
Smart Card Qty: 5
Redeem date range
From date : 10/ 9/2014
To date : 10/ 9/2015
Cost Detail
Ave Cost $0.00
Units in stock 0
Last Cost $0.00
Units on order 0
New Product
Cancel
Save
Discontinue
Receive Product
Print Price Tags
Physical Inventory
Sale Category
EXIT
Ready

Issuing a Smart Card

Once the Smart Card is created, it can now be sold to an individual customer. ***Keep in mind, Smart Cards must be sold to a specific customer and cannot be sold to A Cash Account***. To issue a Smart Card, go to the ***Sales*** module and enter a specific customer in the ***Sold To*** field. Select the ***Smart Card*** 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.

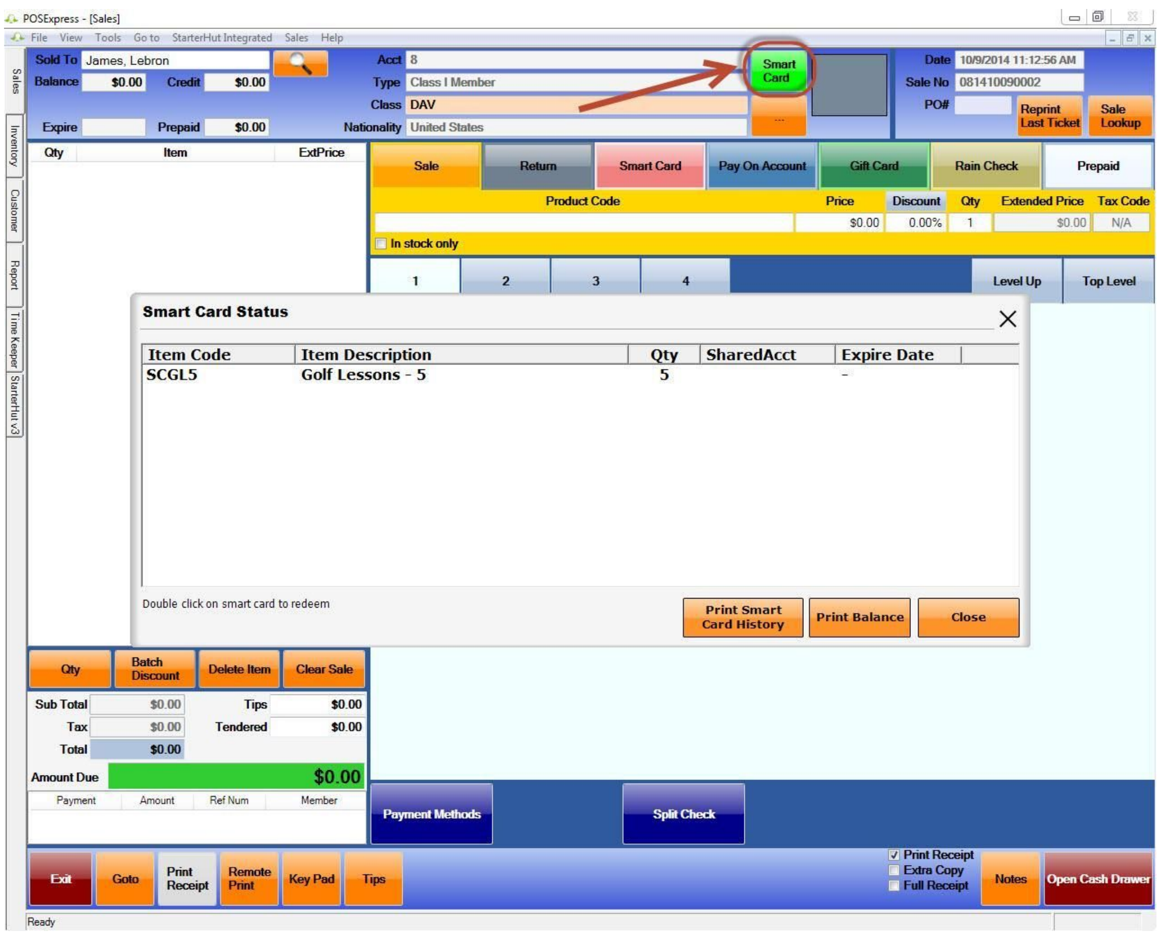
Enter the product code of the Smart Card item by either selecting the assigned QuickSale Button or by entering the product code in the ***Product Code*** field. Select ***Finalize Sale***. This will assign the Smart Card quantity that was given to this product to the specific customer. In the example 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.


POSExpress - [Sales]
File View Tools Go to StarterHut Integrated Sales Help
Sold To James, Lebron
Balance $0.00 Credit $0.00
Expire Prepaid $0.00
Acct 8
Type Class I Member
Class DAV
Nationality United States
Smart Card
Date 10/9/2014 11:07:05 AM
Sale No 081410090001
PO#
Reprint Last Ticket
Sale Lookup
Qty Item ExtPrice
1 Golf Lessons - 5 100.00
Sale
Return
Smart Card
Pay On Account
Gift Card
Rain Check
Prepaid
Product Code Price Discount Qty Extended Price Tax Code
scgl5 $0.00 0.00% 1 $0.00 N/A
In stock only
1 2 3 4 Level Up Top Level
Qty
Batch Discount
Delete Item
Clear Sale
Sub Total $100.00 Tips $0.00
Tax $0.00 Tendered $0.00
Total $100.00
Amount Due $100.00
Payment Amount Ref Num Member
Payment Methods
Split Check
Exit Goto Print Receipt Remote Print Key Pad Tips
Print Receipt
Extra Copy
Full Receipt
Notes
Finalize Sale
Ready
Sales
Inventory
Customer
Report
Time Keeper
StarterHut v3

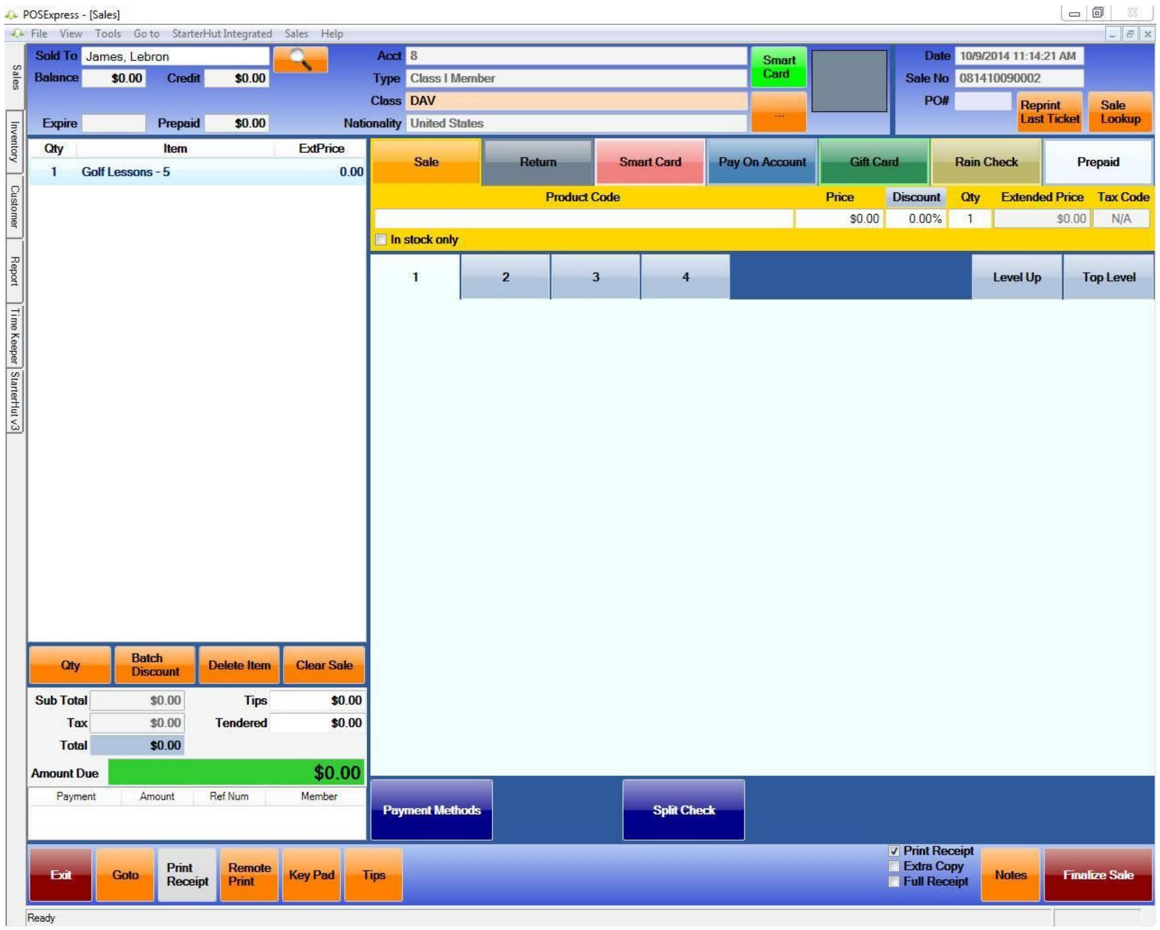
Redeeming a Smart Card

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***.

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.



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.

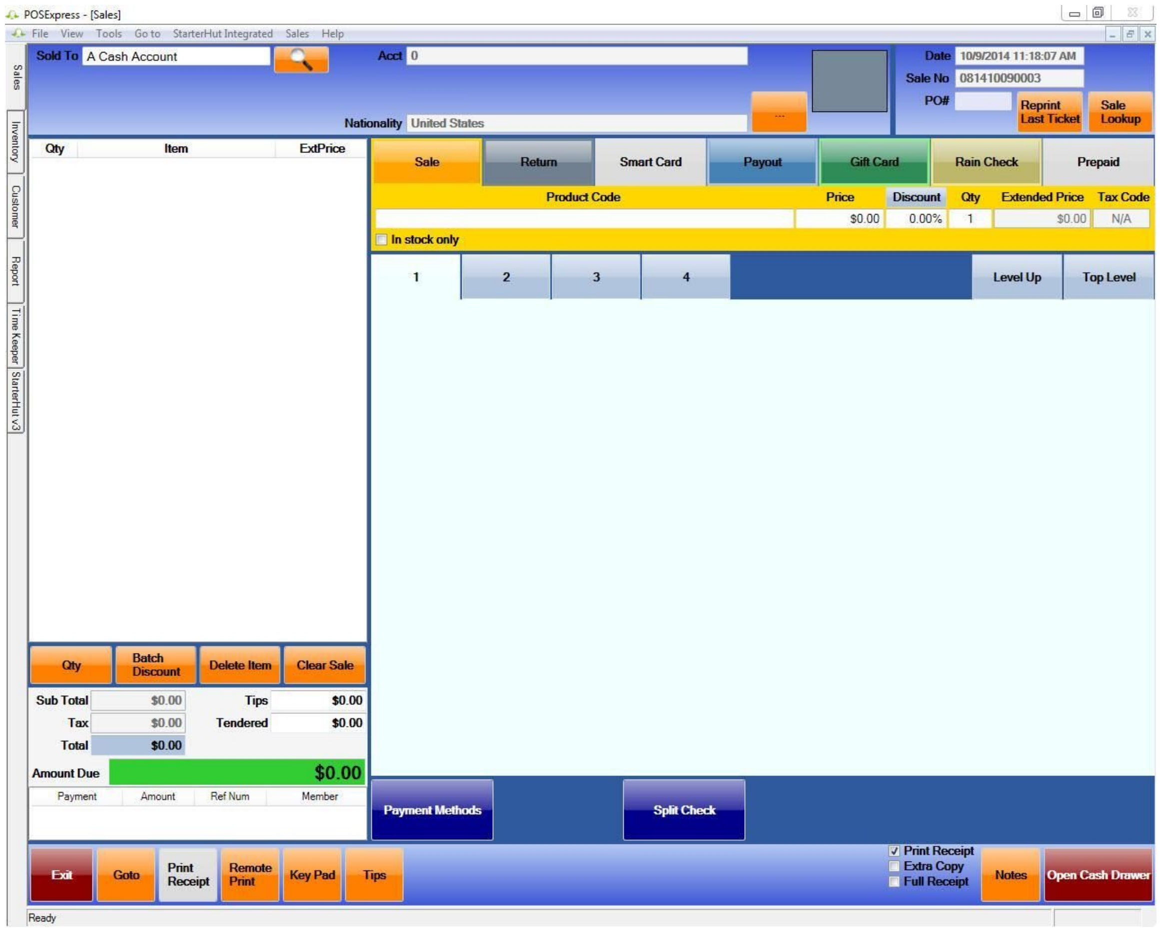
CHAPTER 3

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.

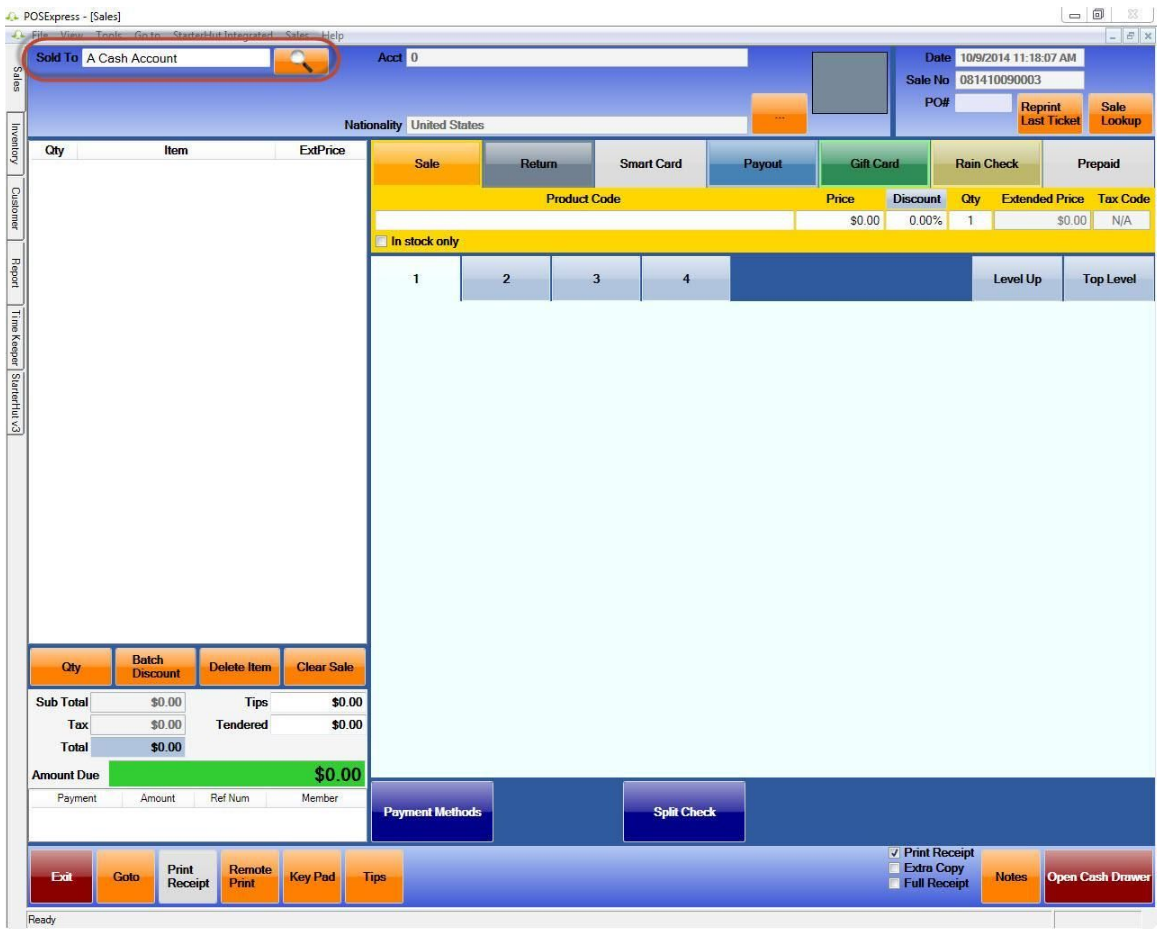
From the home screen of POSExpress, navigate to the ***Sales*** icon:

The Sales screen will be displayed. See Below:

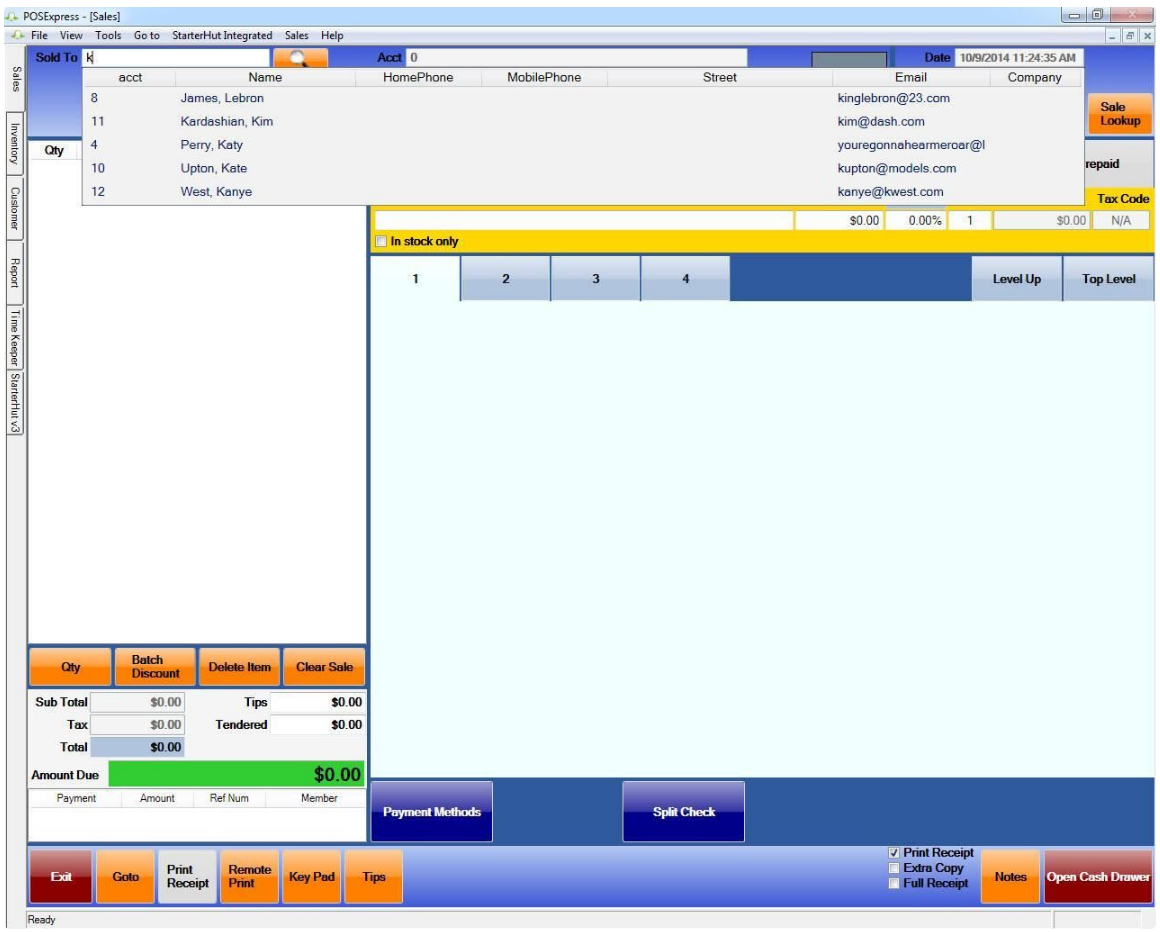


Note: Buttons, fields and other various options may appear differently. Many options and settings on the Sales screen are customizable to each specific terminal or facility.

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.

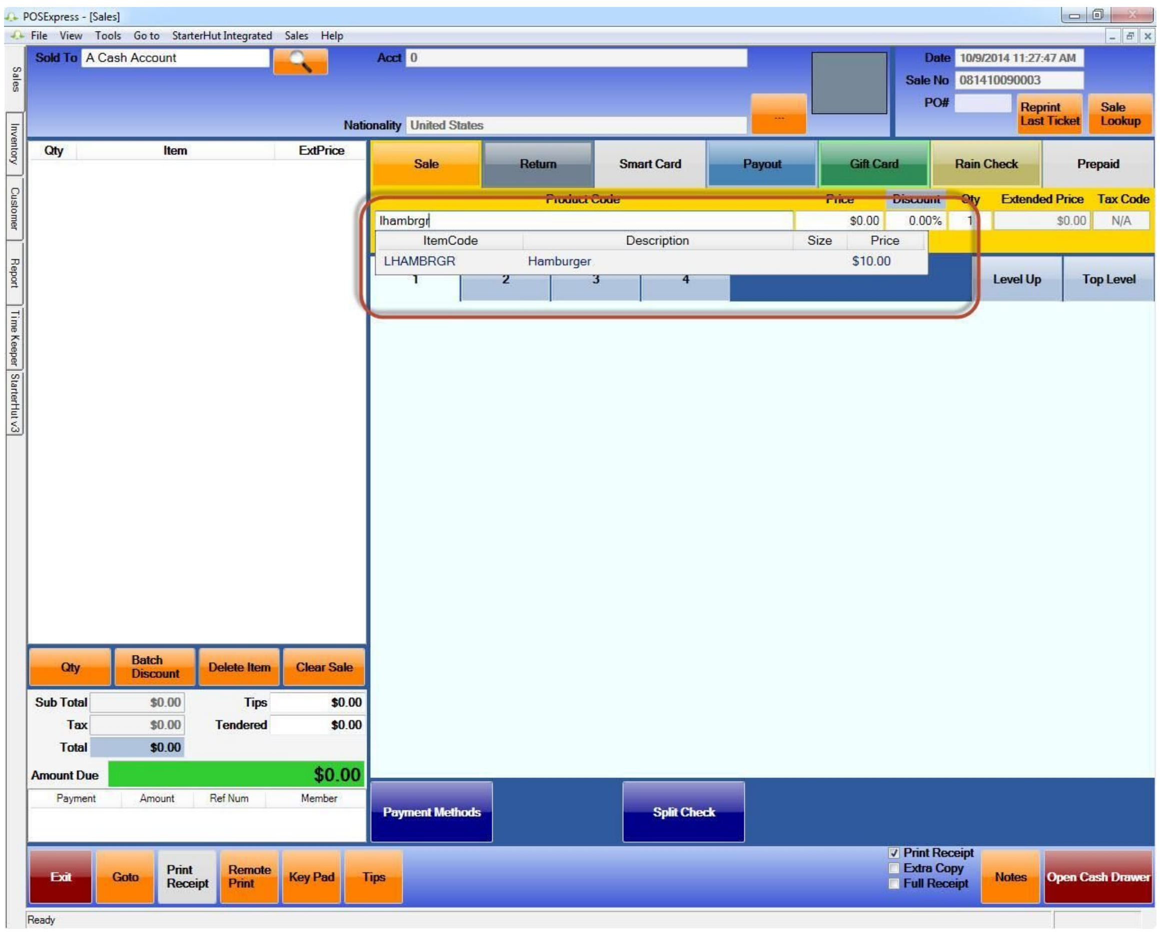


If customers have been created in the ***Customer*** module, they can be located by typing in a customer's name or account number. As the data is entered, the POSExpress "intelisearch" drop down menu will appear. This menu will display all customers that contain the data entered in the Sold To field. 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.



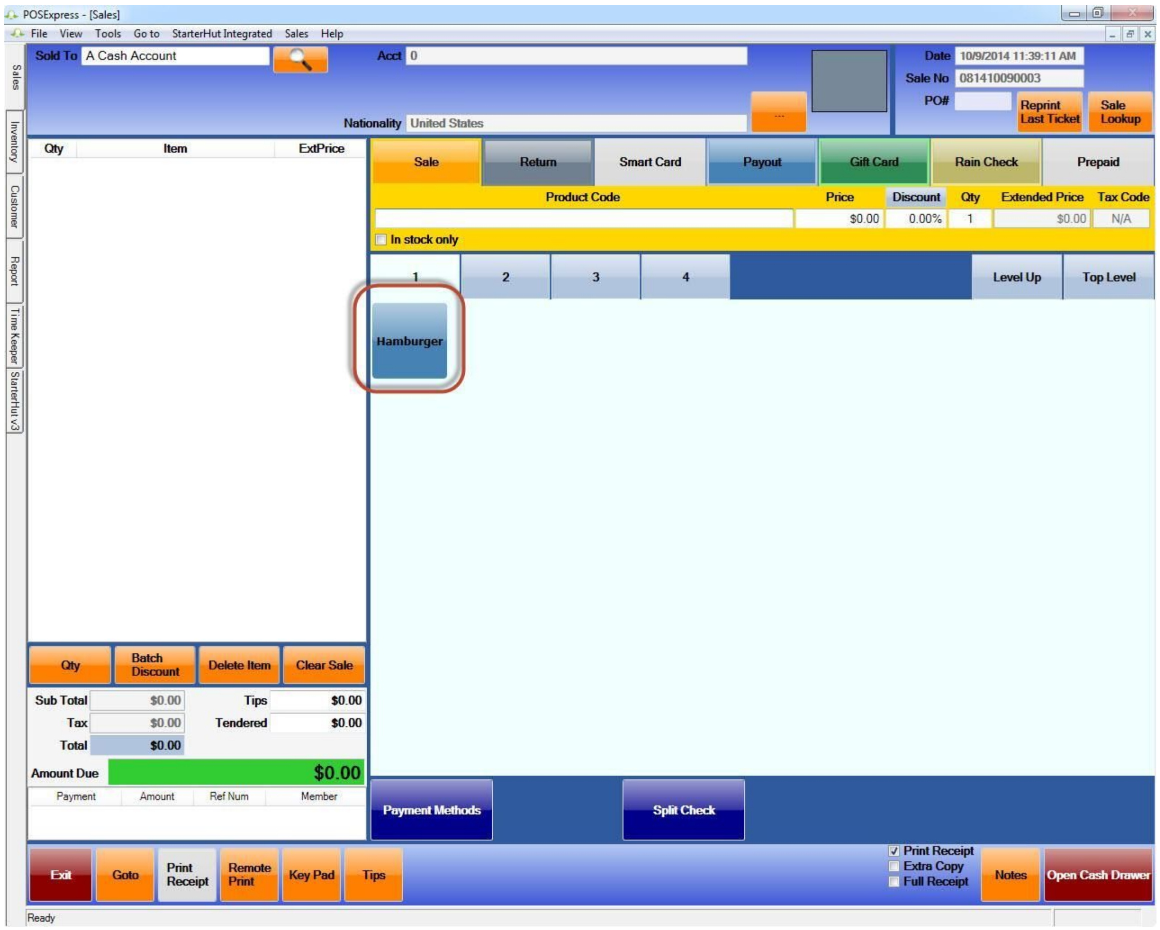
After a specific customer or ***A Cash Account*** has been selected, a transaction can now be entered. First, an item must be selected. There are three ways to select and item to be sold; barcode scanning, QuickSale Buttons and product search

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.

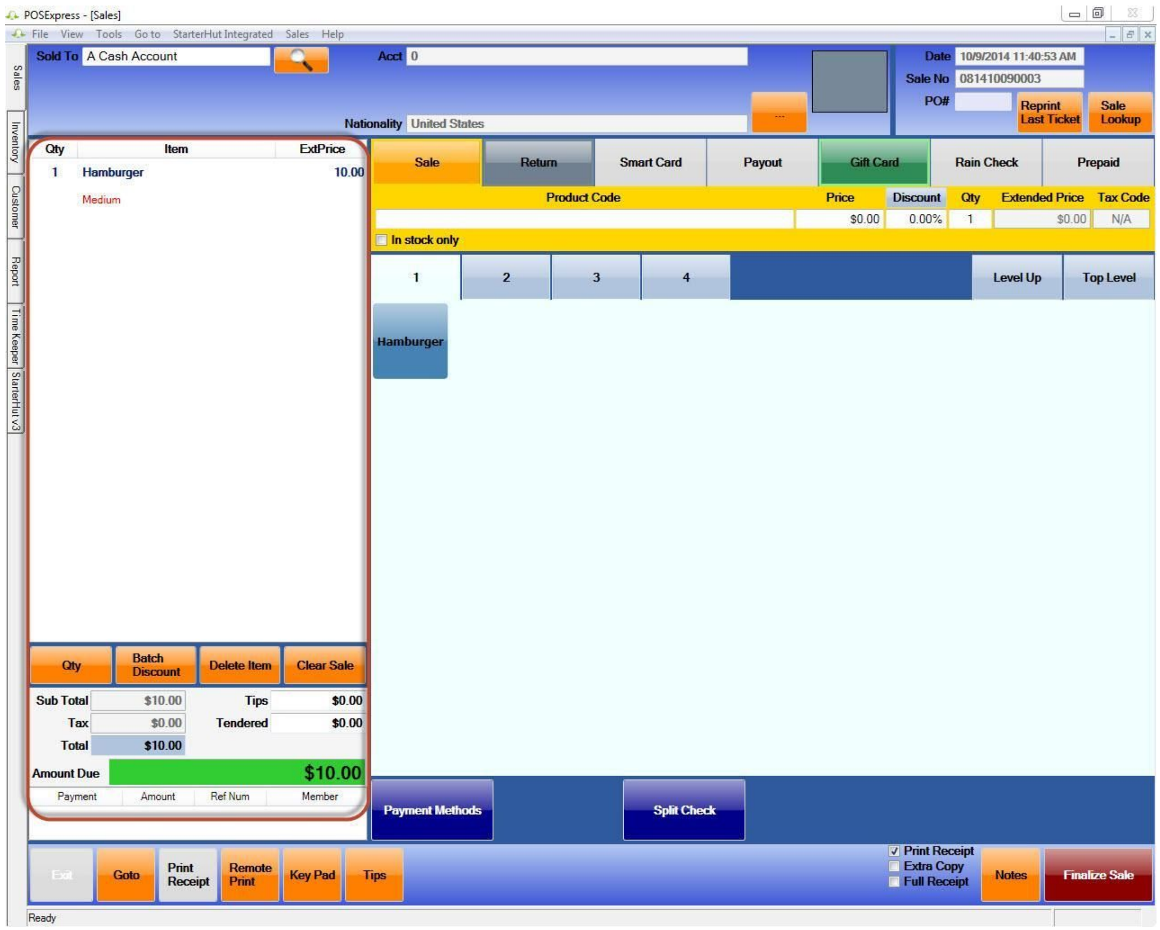


QuickSale Buttons can also be used to locate and sell items. (refer to the QuickSale Button section for setup). The QuickSale menu will be displayed on the Sales. Simply, select the item to be sold.

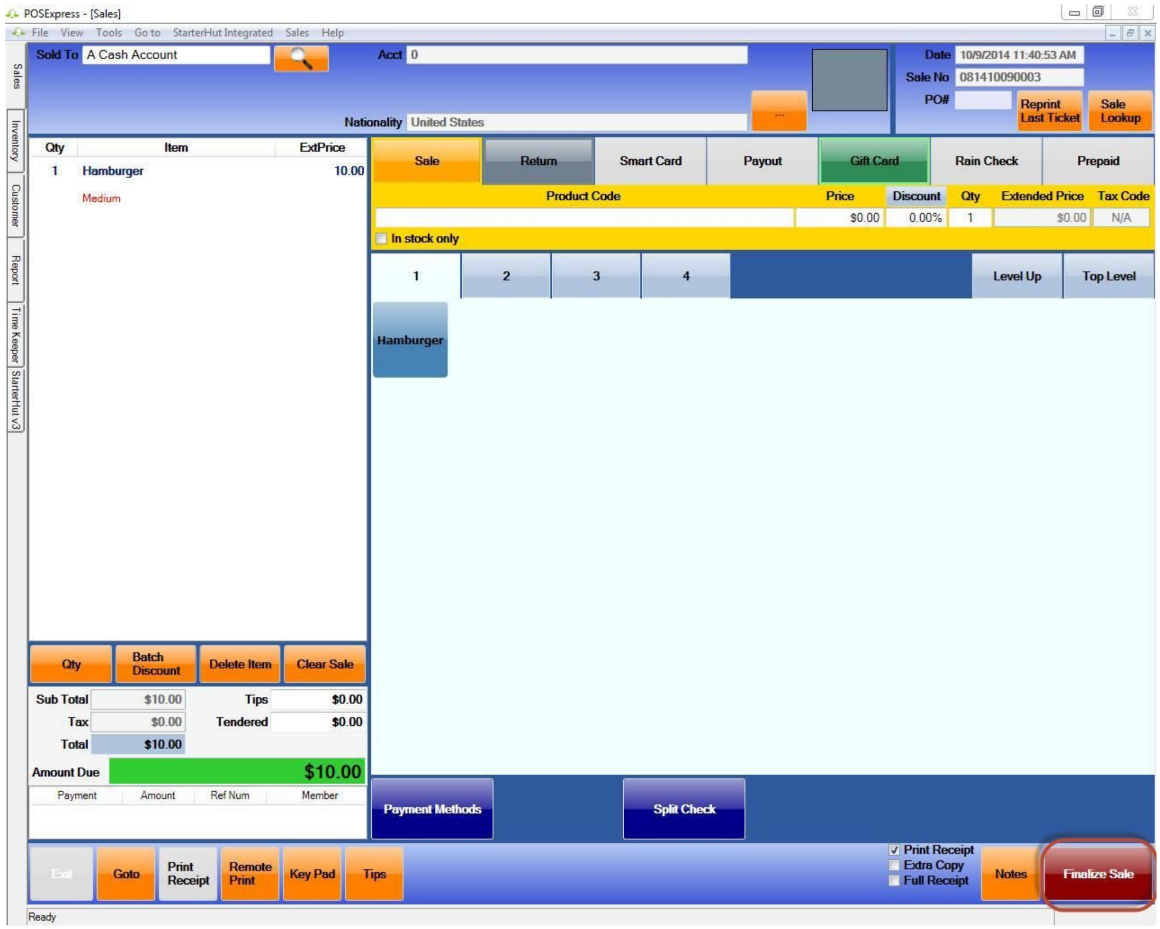
Product Search is done by entering the item code or description of a specific item into the ***Product Code*** field. This field also has the "intelisearch" feature and will locate items based on the data entered in the field.



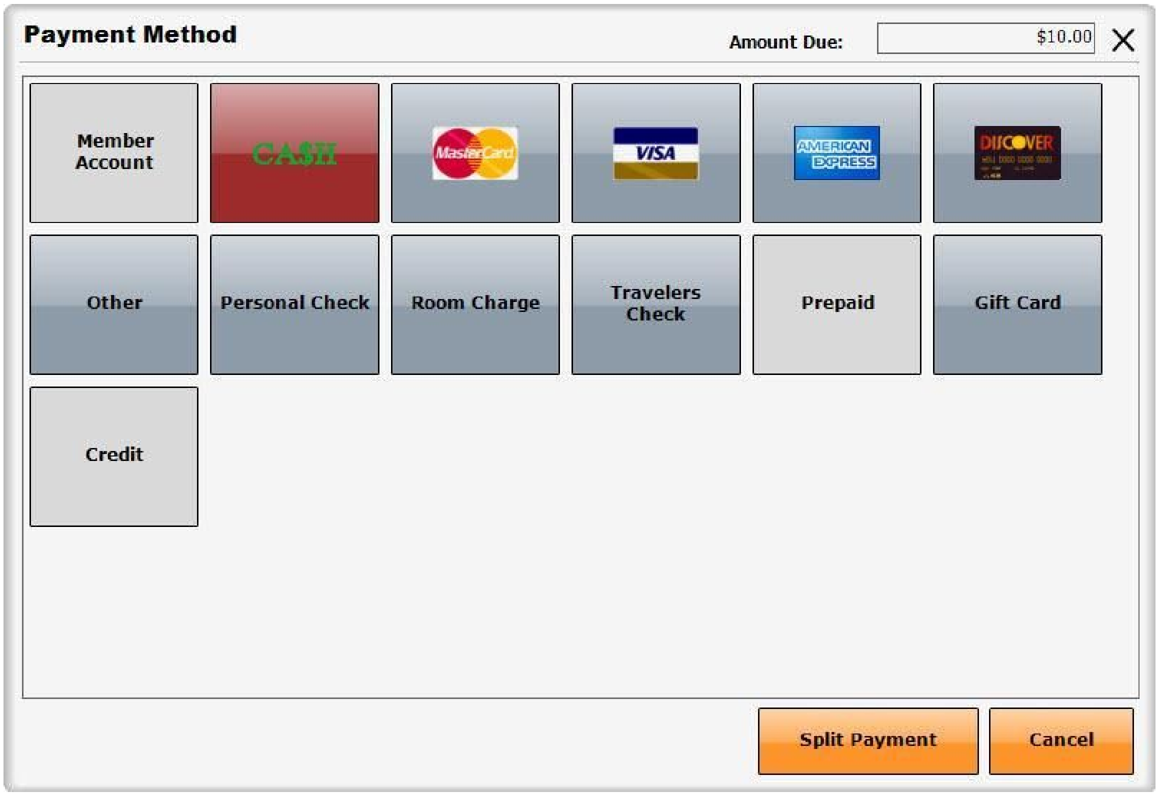
Once a product has been selected, it will appear in the adjacent sale's list.



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

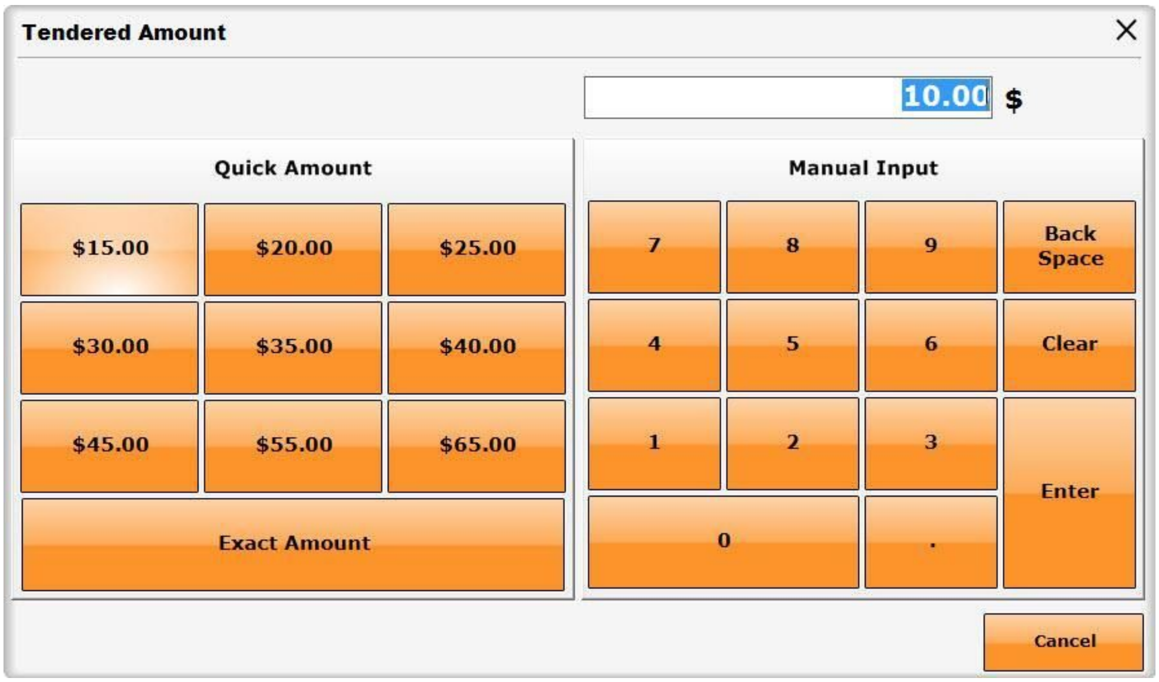


When specific options associated with the sequence of a sales transaction are set accordingly, the ***Payment Method*** screen will appear. Select the payment method for the transaction.



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

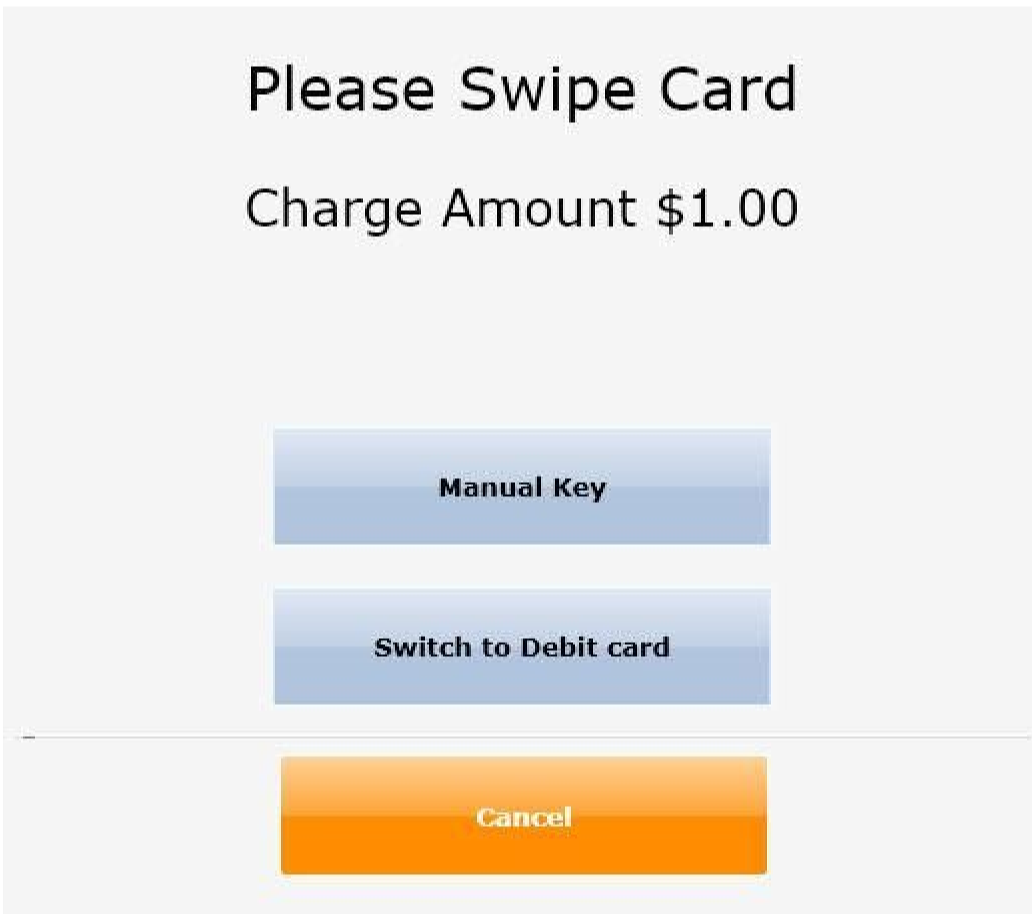
When specific options associated with the sequence of a sales transaction are set accordingly, the ***Tendered Amount*** screen will appear with ***Quick Amount*** on one side and ***Manual Input*** on the other. Enter the correct amount, and the ***Change Due*** screen will display the change due back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



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.

<u>Gift Card Transactions</u>

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.

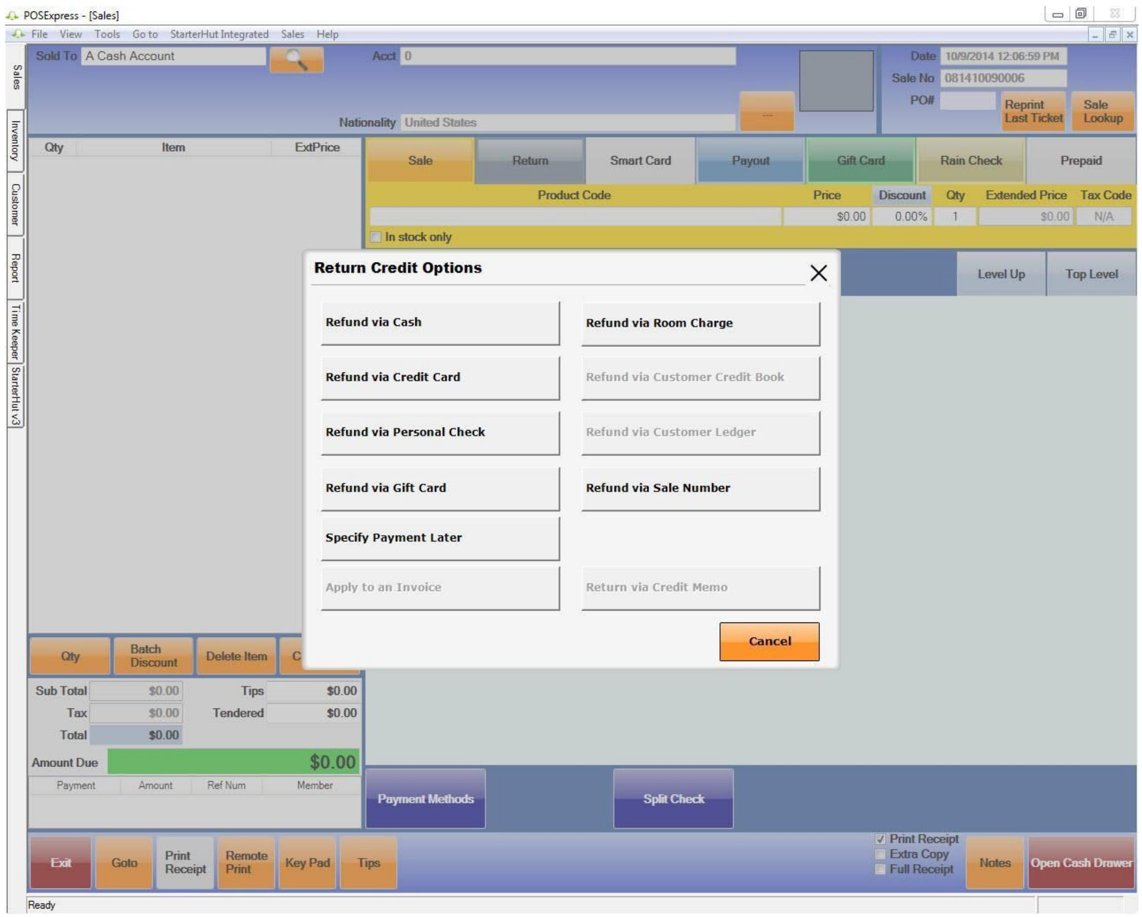
After selecting all items to be sold, select gift card form the payment method screen. The dialogue box shown below will appear.

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.



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.

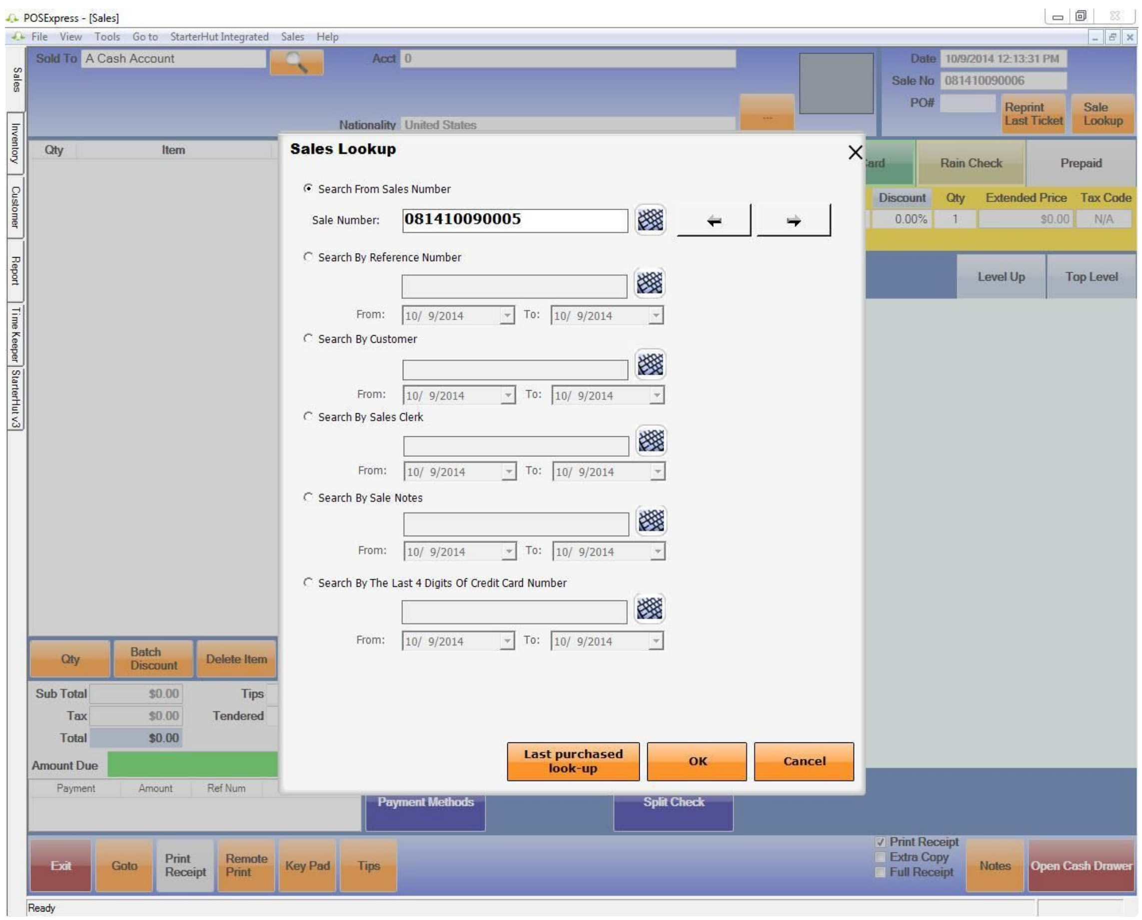
Return via Gift Card: Select the item(s) to be returned via Quicksale buttons, scan or product search and select ***Finalize Sale***. If a card swipe or scanner is installed on the POS terminal, swipe the gift card through the card swipe or scan the bar code it to use it. If a card swipe or scanner is 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.



- 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 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

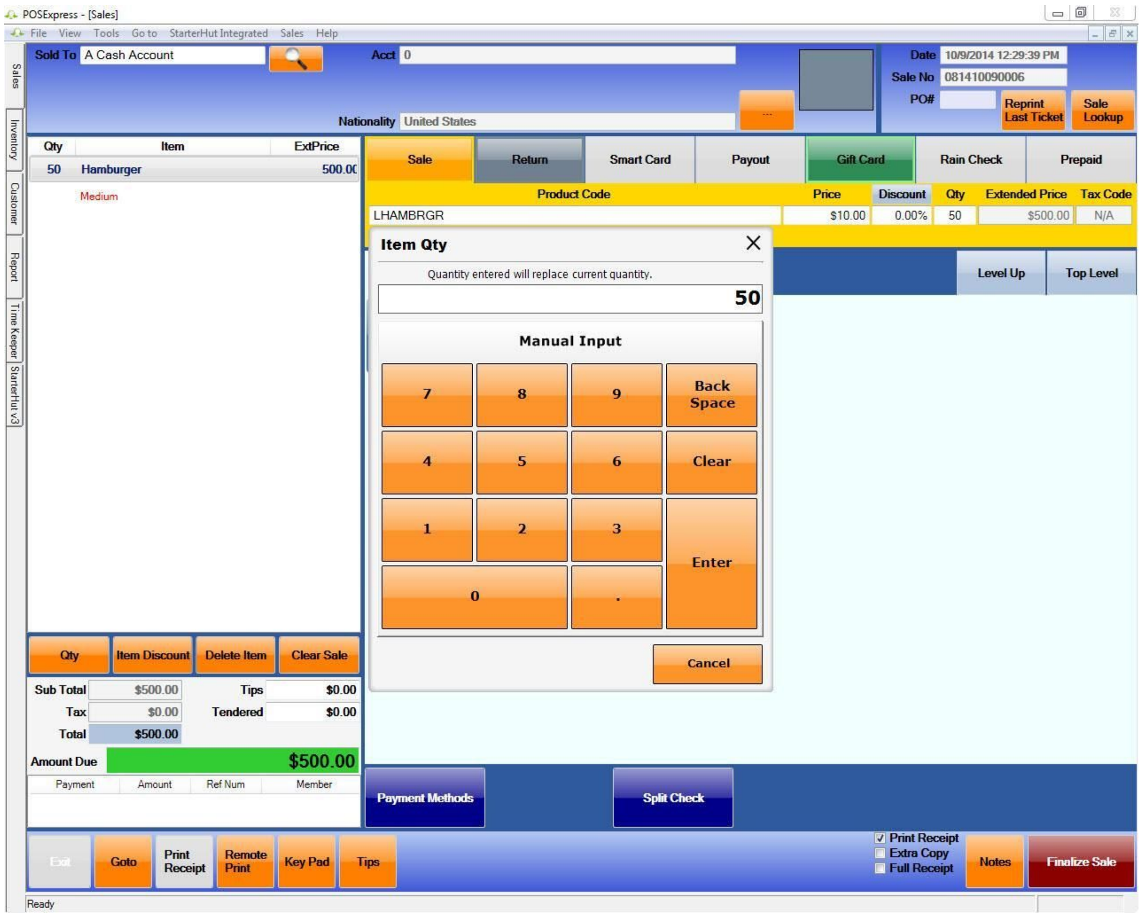
The Sales Function Buttons are located beneath the Sales Items field. These buttons allow the user to perform specific functions prior to finalizing an individual transaction. Based on the option settings of particular facilities, the following buttons may or may not be visible:

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.

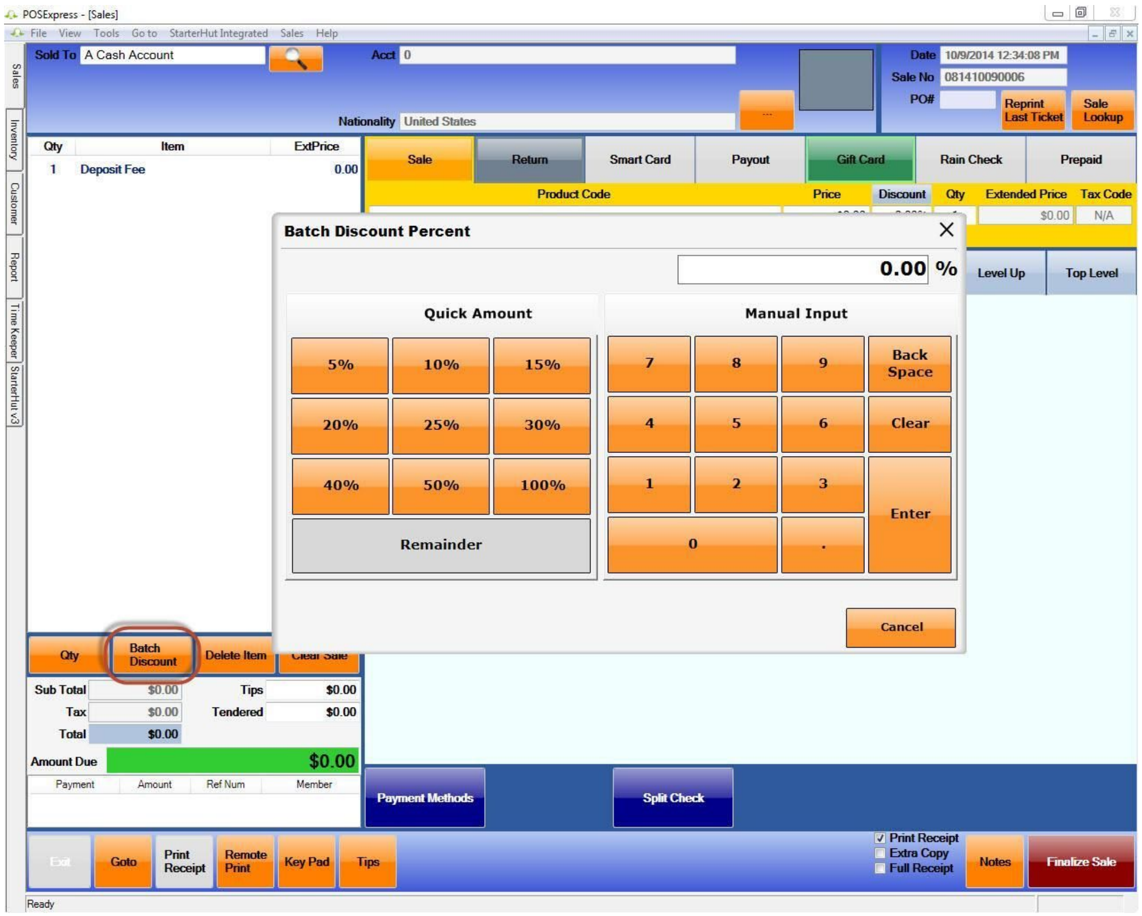


<u>Applying a Discount</u>

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.

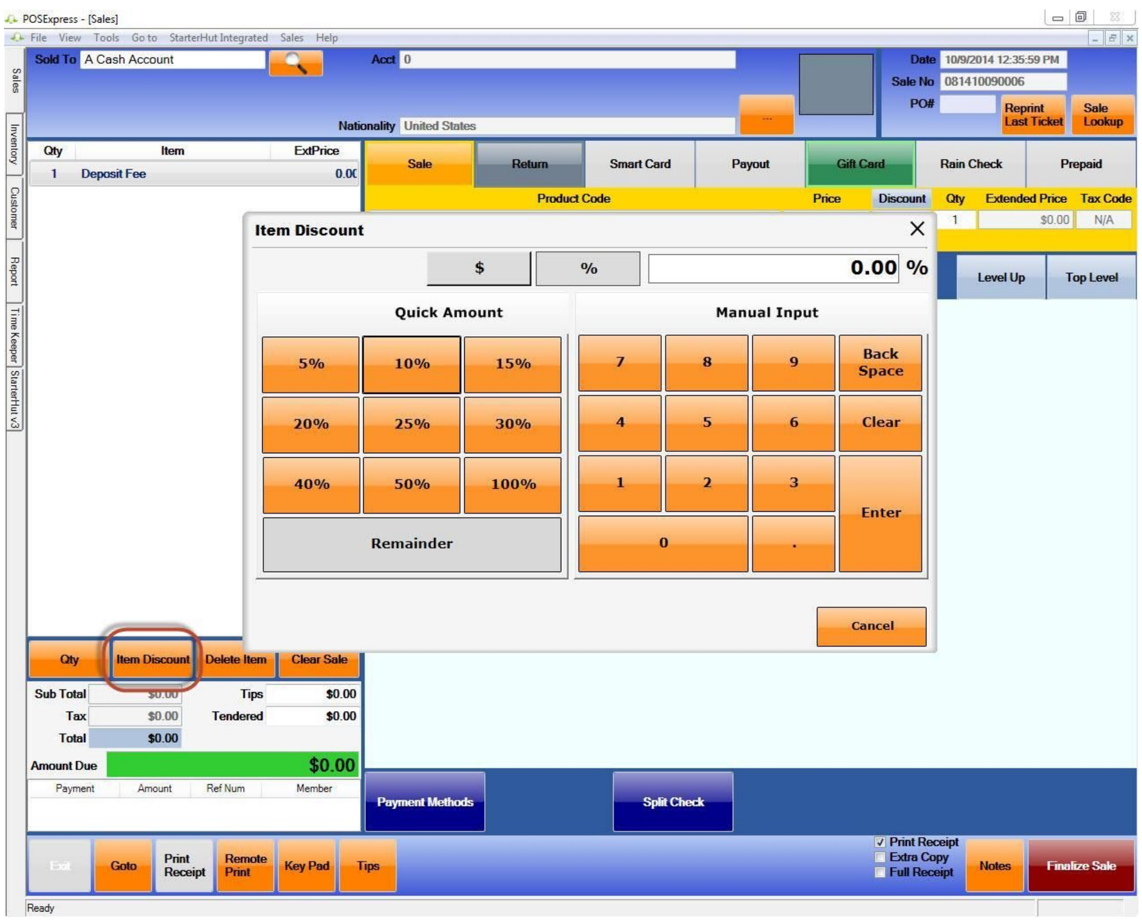
POSExpress also contains settings in the Options screen that allow for discounts by specific dollar amounts, as opposed to percentages. The discount function can also be password protected.



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.



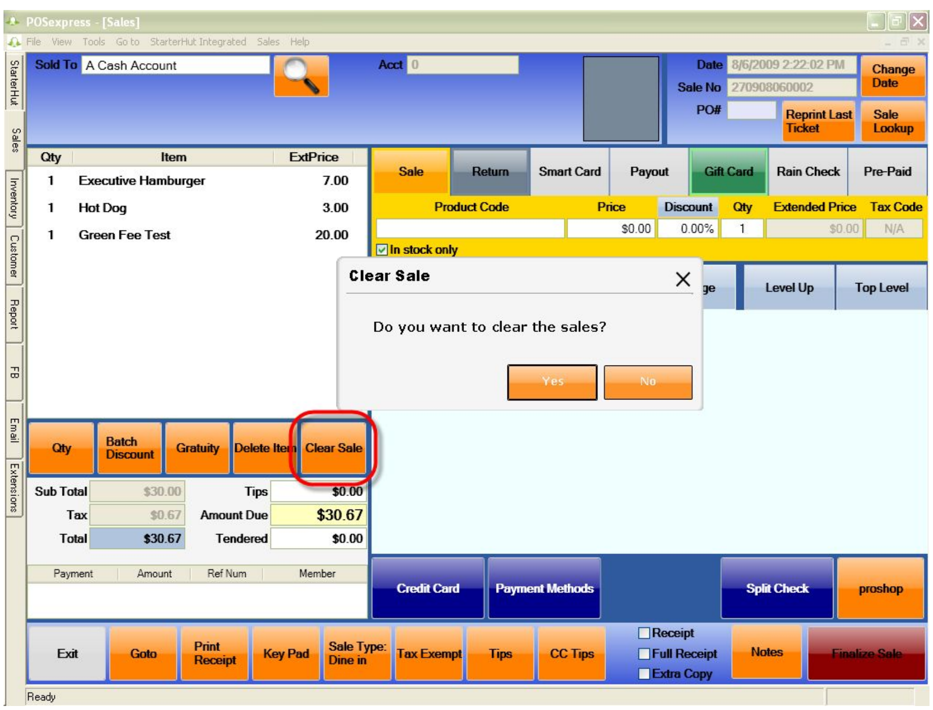
Deleting an Item

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.

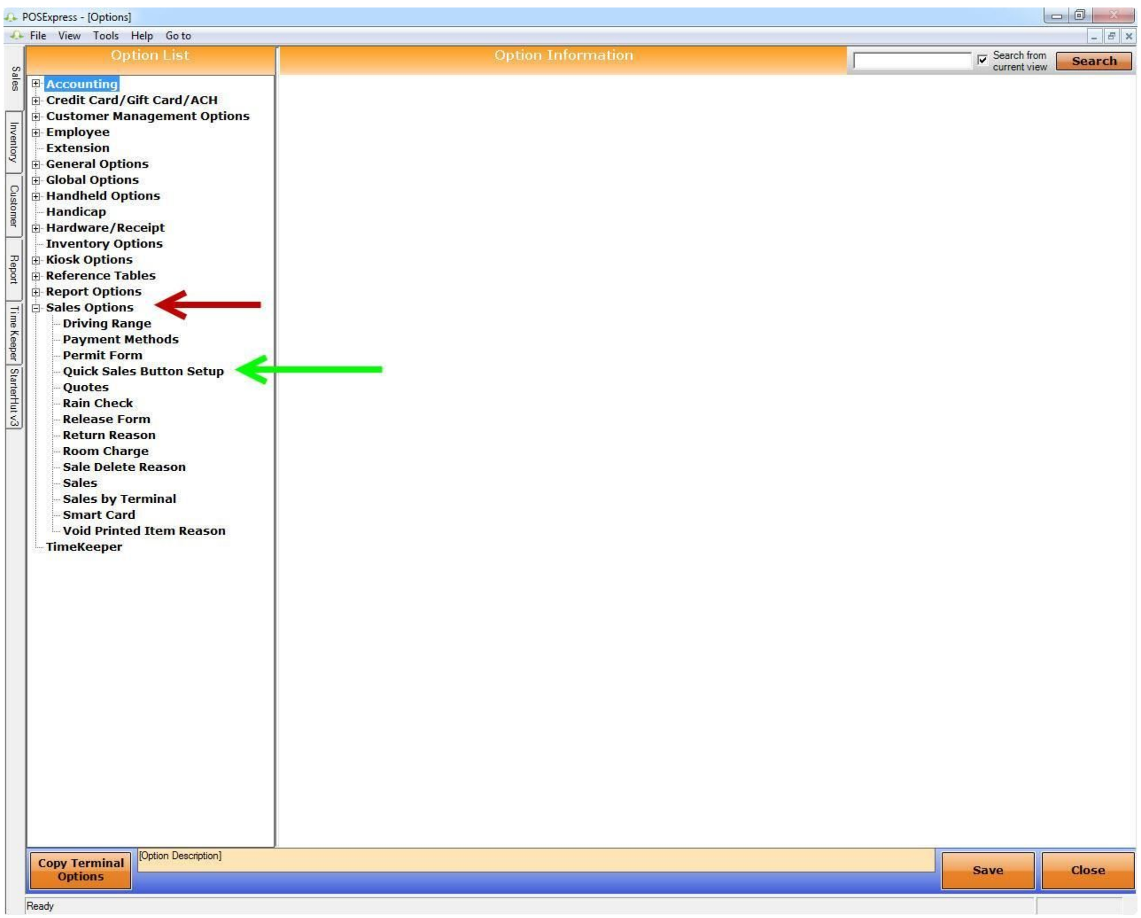
Clearing a Sale

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

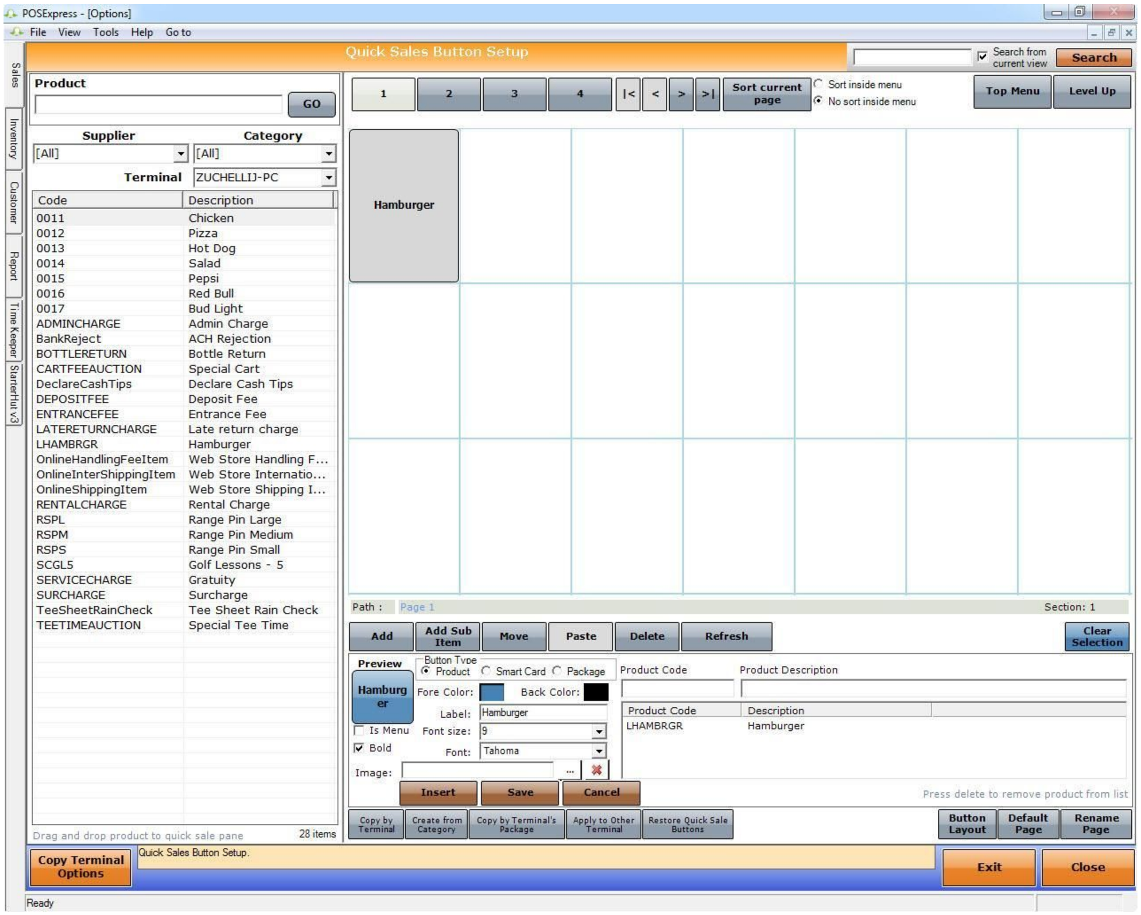
There will be a button titled ***Button Layout*** on the setup screen. This enables the user to customize the landscape of the four pages of the Quicksale Button grid as it appears on the Sales screen. There are two selections for this grid:

- 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.


POSExpress - [Options]
File View Tools Help Go to
Quick Sales Button Setup
Search from current view
Search
Product
GO
Supplier
Category
Terminal
ZUCHELLIJ-PC
Code Description
0011 Chicken
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
SCGL5 Golf Lessons - 5
SERVICECHARGE Gratuity
SURCHARGE Surcharge
TeeSheetRainCheck Tee Sheet Rain Check
TEETIMEAUCTION Special Tee Time
Drag and drop product to quick sale pane
28 items
Sort current page
Sort inside menu
No sort inside menu
Top Menu
Level Up
Hamburger
Path : Page 1
Section: 1
Add
Add Sub Item
Move
Paste
Delete
Refresh
Clear Selection
Preview
Button Type
Product
Smart Card
Package
Fore Color:
Back Color:
Label:
Is Menu
Bold
Font size:
Font:
Tahoma
Image:
Product Code
Product Description
LHAMBRGR Hamburger
Insert
Save
Cancel
Press delete to remove product from list
Copy by Terminal
Create from Category
Copy by Terminal's Package
Apply to Other Terminal
Restore Quick Sale Buttons
Button Layout
Default Page
Rename Page
Copy Terminal Options
Quick Sales Button Setup.
Exit
Close
Ready

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.

- **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.

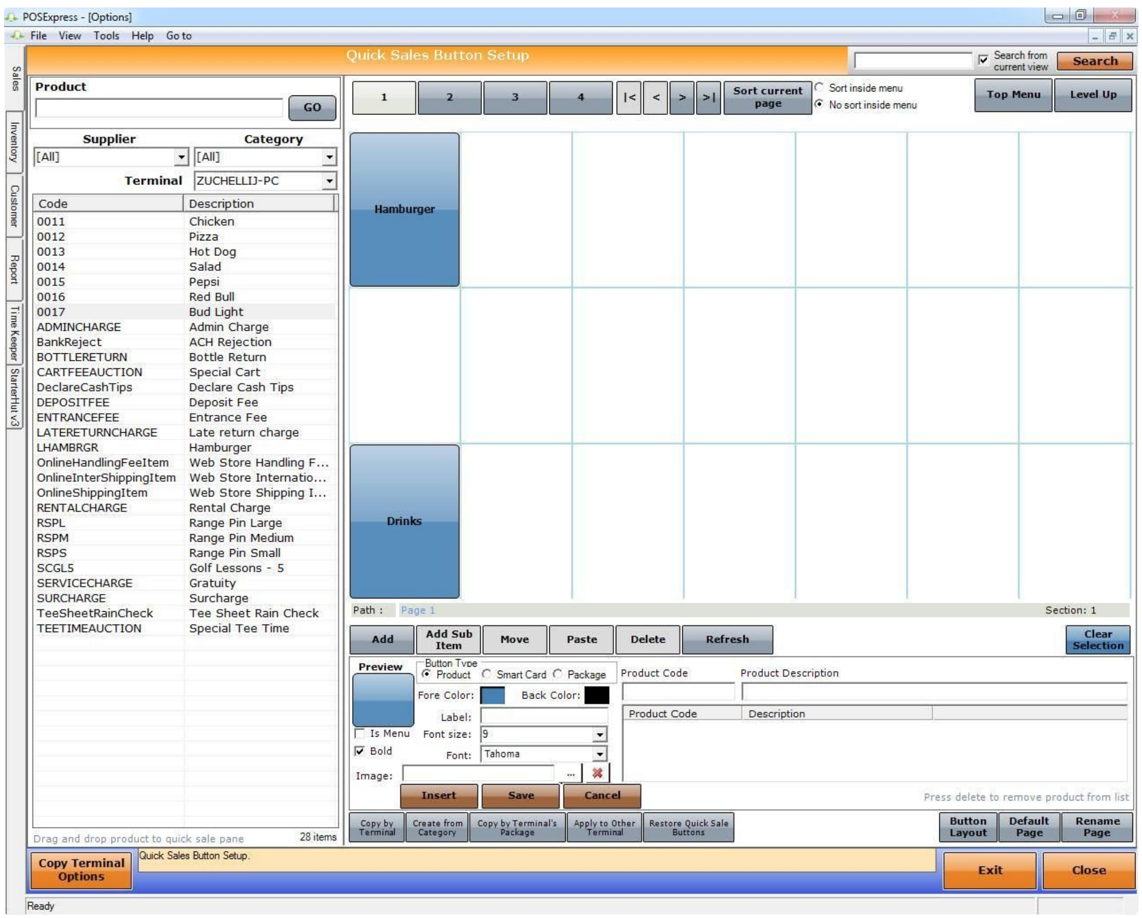
- **Product Code –** Extra product codes and description can be entered here. The program will automatically take the code and description from the inventory item when it is dragged from the list to the Quicksale panel.

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

Creating Parent/Child (Sub-Menus)

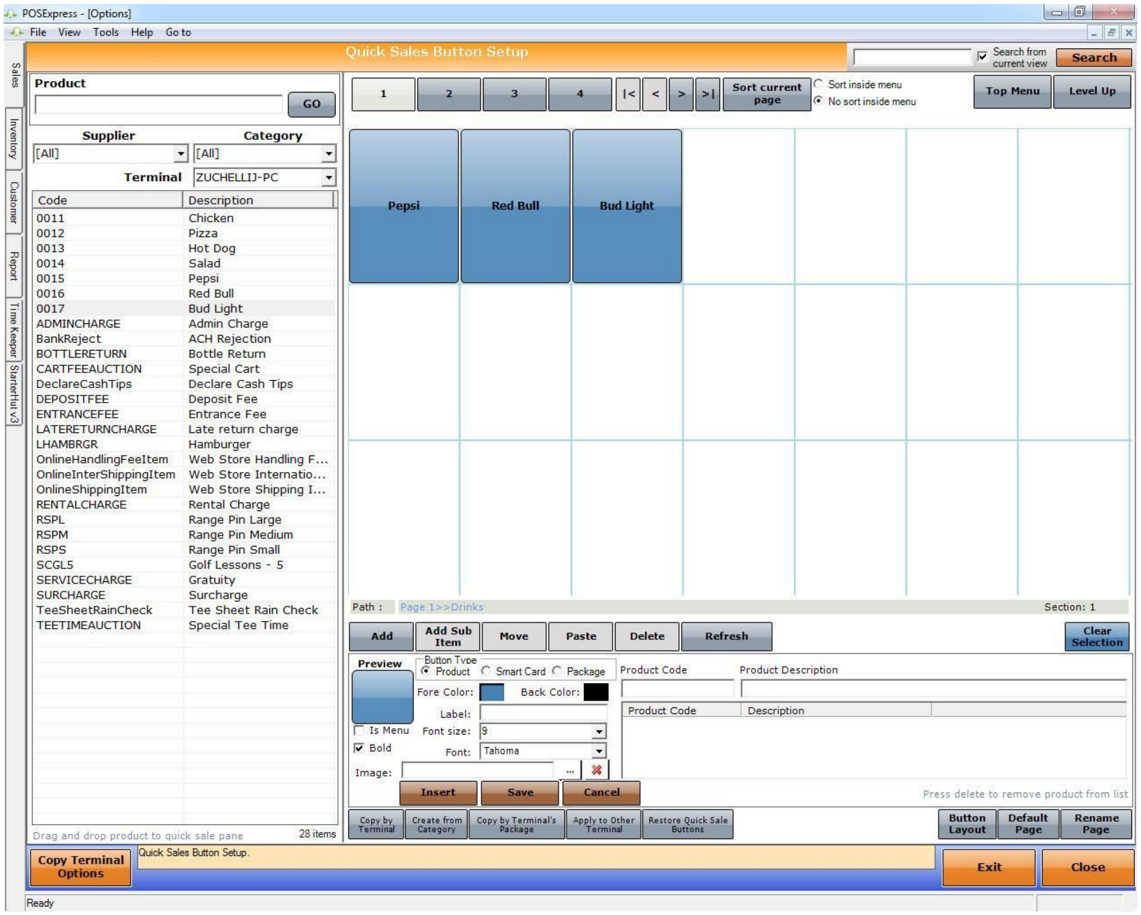
To add a menu item on the Quick Sales grid, select a vacant cell on the grid. Once selected, the cell will be highlighted. In the options section, place a check in the ***Is Menu*** box and add the description of the button in the ***Label*** field. Select ***Save***.

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.



POSExpress - [Options]
Quick Sales Button Setup
Product
GO
Supplier
Category
Terminal
ZUCHELLIJ-PC
Code
Description
0011 Chicken
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
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
TEETIMEAUCTION Special Tee Time
Drag and drop product to quick sale pane
28 items
Pepsi
Red Bull
Bud Light
Sort current page
Top Menu
Level Up
Search
Add
Add Sub Item
Move
Paste
Delete
Refresh
Clear Selection
Insert
Save
Cancel
Copy Terminal Options
Quick Sales Button Setup.
Exit
Close
Ready

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

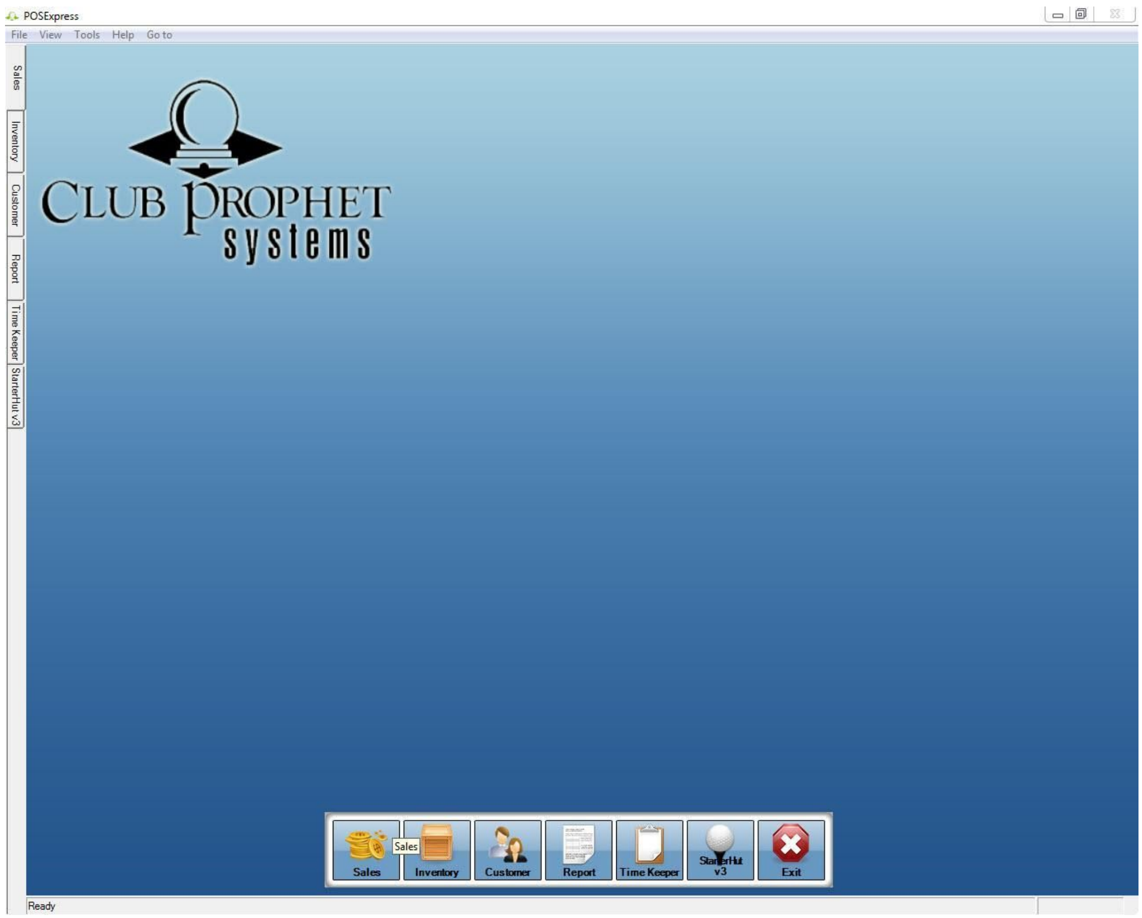
Once Quick Sales Buttons are created, the same button layout can be pushed to other terminals on the network. If the exact button grid will be used on multiple terminals, this option allows the buttons to be copied from one terminal to another. From the ***Quick Sale Button Setup*** screen:

- 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.

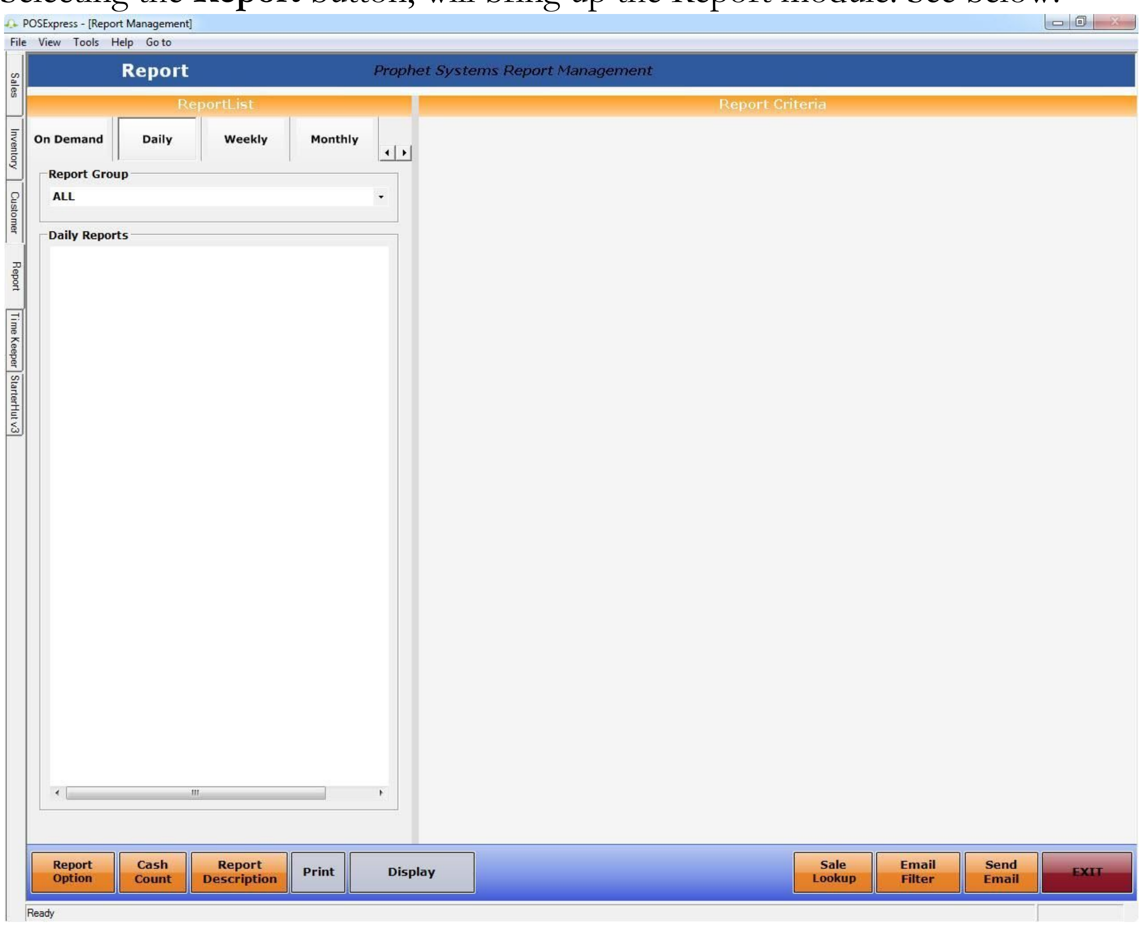
CHAPTER 4

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:

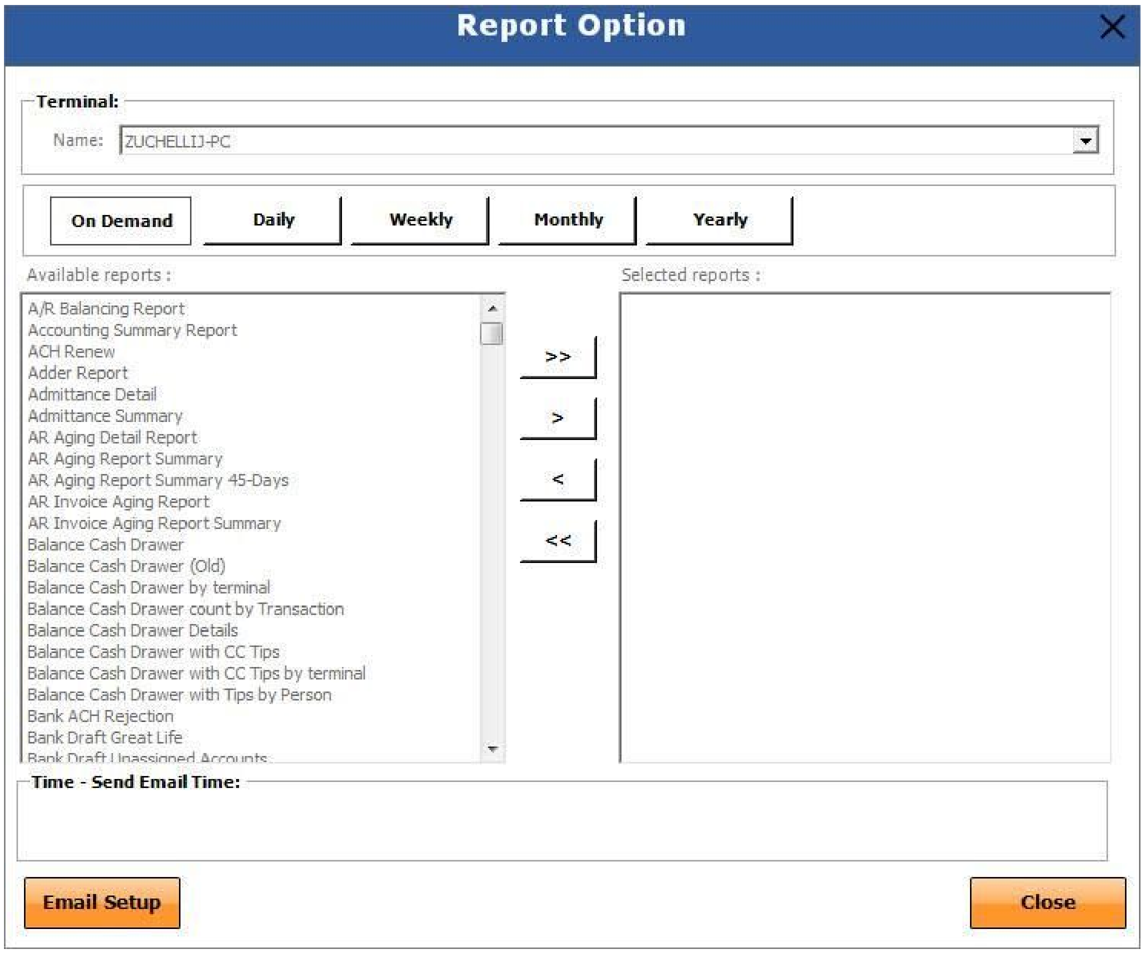
Selecting the **Report** button, will bring up the Report module. See below:



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.

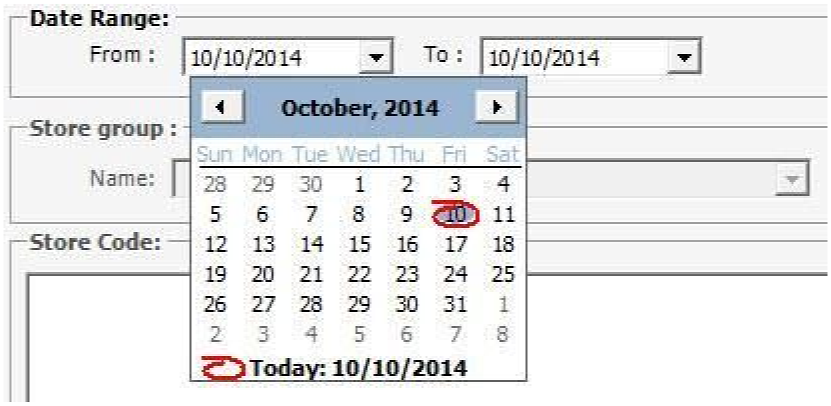
Each of the 5 report tabs can be customized to display only specific, desired reports. This is by done by first selecting the report tab that is to be customized. In the example below, On Demand is selected.



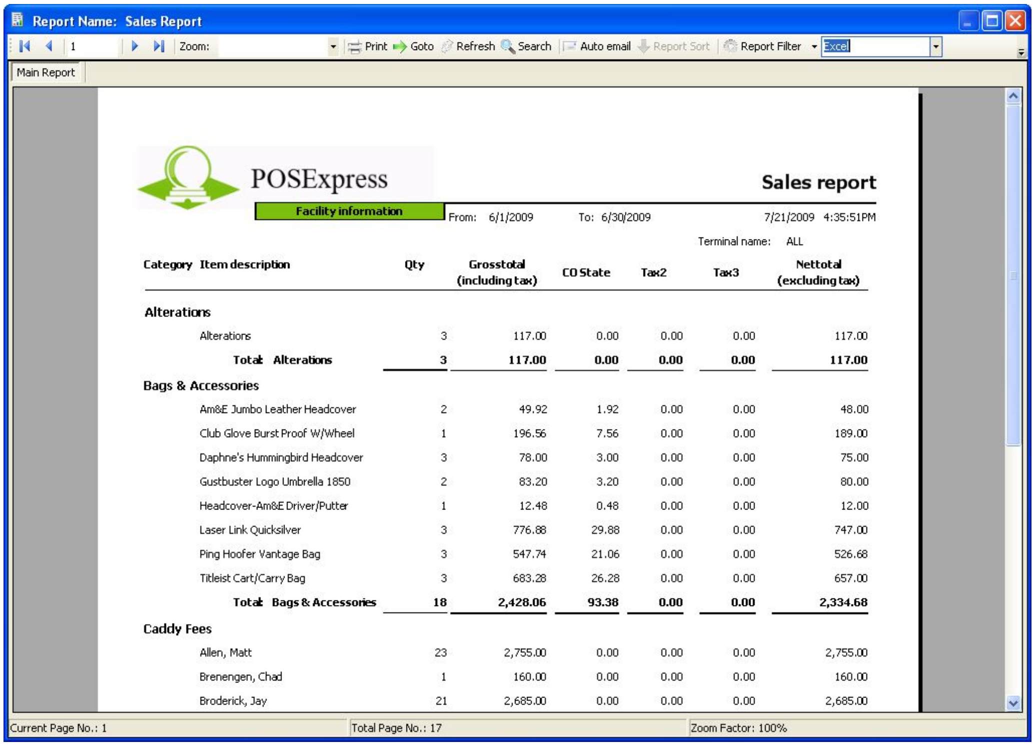
This screen enables the user to populate each report tab with only the desired reports.

- 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.



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*.


Report Name: Sales Report

Main Report

POSExpress

Facility information

Sales report

From: 6/1/2009 To: 6/30/2009 7/21/2009 4:35:51PM

Terminal name: ALL

Category	Item description	Qty	Grosstotal (including tax)	CO State	Tax2	Tax3	Nettotal (excluding tax)
Alterations							
	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**
Bags & 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	**18**	**2,428.06**	**93.38**	**0.00**	**0.00**	**2,334.68**
Caddy Fees							
	Allen, Matt	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	21	2,685.00	0.00	0.00	0.00	2,685.00

Current Page No.: 1 Total Page No.: 17 Zoom Factor: 100%

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)