

## **POINT OF SALE (POS) - OPTION 600**

**Note:** See Section 1. **Recommended Hardware** for this Option.

The Conveyorware Point of Sale (POS) Menu contains all the functions needed for **retail sales management** transactions. Cashier register sales, returns, and gift card management are all located here.

The system provides Cashier support, as well as accountability. The POS Manager Menu has secured setup and management functions for registers and gift cards. There are options for adding and editing localized sales taxes and gift card rules.

The POS system does not identify individual customers, however. All POS sales are recorded to Customer **Number 1**, the account automatically created for the company. If customer information is required for marketing purposes, customer-supplied contact data must be manually keyed into a non-integrated file like Excel.

POS uses established Vendor Accounts for pay-on-demand cash disbursements, but can also create a new Vendor Account, through the register, when needed. Vendor payments carry to Accounts Payable, where POs and Invoices complete the cost-of-goods-sold accounting cycle. The POS system carries standard retail transactions all the way through to the company's **General Ledger**.

POS Reports include Cashier Check- In/Out, and Cash Disbursements. More general Inventory and Sales Reports information can be found in other sections of this manual.

Conveyorware POS requires a **computer** (any browser-enabled device i.e. laptop, tablet, etc.), a **receipt printer** and a connected electronic cash drawer, or **register**. **Each register must first be linked to the HOD receipt printer** because every transaction concludes with a detailed printed receipt. Each printer and register must first have an active online sign-on for the register's output.

### **Enable Host On Demand (HOD) Receipt Printer**

- ➔ Log in to [www.CONVEYORWARE.com](http://www.CONVEYORWARE.com) using the original assigned User ID and Password (unless you have changed the password) and Select the **“WebSphere Host on Demand”** login. (An ID created by the Administrator will **NOT** connect to your printer.)

**Note:** Only **Passwords** can be changed by each user to connect a specific printer to HOD.

- ➔ In the HOD link, click on the 5250 **printer icon** to connect to the **receipt** printer. If the **“receipt”** printer is not listed, return to Section 2, page 12 **“Adding Additional Printers to HOD”**.
- ➔ **MINIMIZE** THE PRINTER SCREEN keeping the printer connection open.

**Note:** Choosing 5250\_\_ will open the *Green Screen* version of Conveyorware on the *AS400*. This is the original IBM User Interface. **DO NOT** use this version unless you are familiar with this interface.

## ADD A CASH REGISTER

Now that the printer is connected to the software, the last item to connect is the register.

Select 1. Main Menu

600 Point of Sale

619 Point of Sale Manager Menu

620 Work with Registers

Conveyorware Distribution System FMW D00000010  
WORK OTC300D3

Work with Registers

Company Number...: 100  
Register Number...:

Select option, press Enter.  
2=Change 4=Delete 5=Display 12=Display Open Drawers

Opt Co Register	Description	Printer	Active	Status
** No Registers Found **				

Help Exit Refresh Add Cancel  
Continue

- ➔ Verify the company number
- ➔ Insert the register number
- ➔ Select **[Add]**.

Conveyorware Distribution System FMW D00000010  
ADD OTC301D1

Add A Register

Company.....: 101  
Register.....: 1  
Description..:   
Printer.....:   
Active Code...: A A =Active, I =Inactive

Help Exit Cancel Continue

- ➔ Insert a description that relates to the register.
- ➔ Insert the **name** of the printer to be connected to this register from the HOD list.
- ➔ **[Exit]** Twice to return to the Point of Sale Main Menu

## Prepare Cash Drawer

Select: 600. Point of Sale Menu

Select: 601: Cashier Checkin/Checkout

- ➔ Insert the Company Number
- ➔ Complete the four questions: You are checking **IN** your cash drawer.  
“Drawer” can be the user name or a number.

Conveyorware Distribution System FMW CONVEYOR OTC303R

Cashier Checkin/Checkout

Is This an IN or OUT Transaction?:

Register Number.....:

Drawer.....:

Total Drawer Amount (Checkin Only):

- ➔ [Continue] or Enter

The system now requires a specific count of the money in the cash drawer.

Conveyorware Distribution System FMW D00000010 OTC303R

CASHIER CHECKIN

Register#: 2  
Drawer...: 1

COIN: Pennies:   
Nickels:   
Dimes:   
Quarters:   
Dollar Coin:

TOTAL COIN:   
BILLS: 1\$:   
2\$:   
5\$:   
10\$:  20.00  
20\$:   
50\$:   
100\$:   
Other Bills:  .00

20.00 DRAWER IN: 20.00

TOTAL BILLS 20.00 OVER/UNDER: .00

Help Exit Cancel Continue

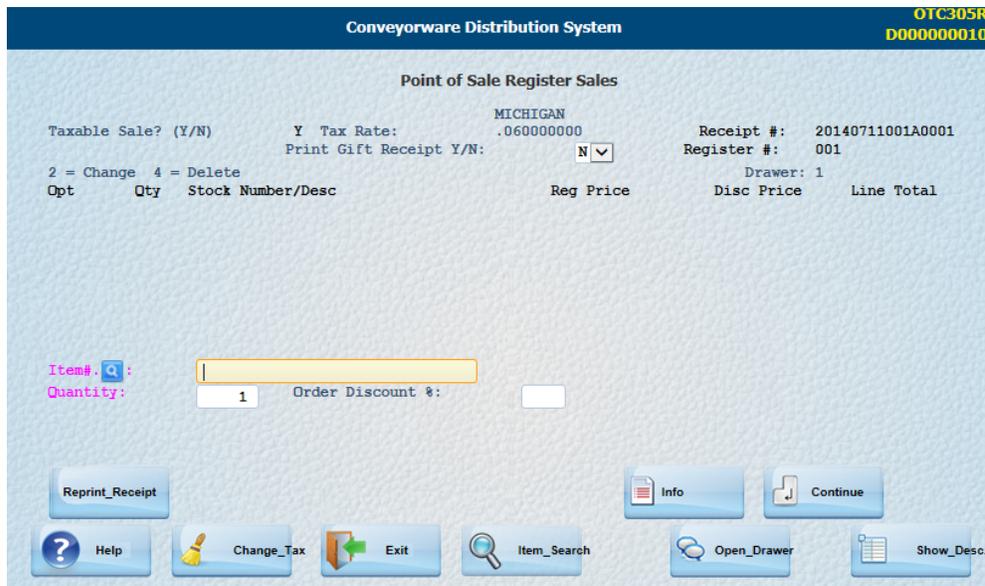
BALANCED !!! Press Enter to Continue

- ➔ Input amounts and [Continue].

Once your drawer is balanced, you are ready to accept sales.

Select 610. POS Register Sales

➔ Re-insert the Register and drawer number you have chosen. [Continue]



*Note: The Sales Tax information has defaulted to the Customer set-up state, which defaulted from the initial Company set-up in Option 626 unless the customer default state has been changed.*

The 'Point of Sale Register Sales' screen has many additional features. Once an item is entered by Scanning or selected from the Item list:

- A full product description can be viewed using [Show Desc.].
- The quantity purchased can be changed.
- A Discount can be added.
- The Quantity, Price or Discount for any Item can be adjusted by inputting the number “2” in the “Opt” box created next to the “Qty” box for that Item.



## User Guide-Point of Sale

If this order is **Tax Exempt**, select **[Change Tax]** and insert Tax Exempt Number if available.

All sale amounts and taxes will automatically report to the General Ledger and the inventory file will also be updated.

### Add Inventory Items

If an item is not in the inventory file, it can be added immediately. [Continue] or Enter.

Conveyorware Distribution System OTC305R  
D00000010

Point of Sale Register Sales

Taxable Sale? (Y/N) Y Tax Rate: MICHIGAN .06000000 Receipt #: 20140711001A0003  
Print Gift Receipt Y/N: N Register #: 001  
2 = Change 4 = Delete Drawer: 1  
Opt Qty Stock Number/Desc Reg Price Disc Price Line Total

Item# Q: MLGP  
Quantity: 1 Order Discount \$:

Reprint\_Receipt Info Continue Add  
Help Change\_Tax Exit Item\_Search Open\_Drawer Show\_Desc.

Item not found in inventory file Press F7 add item to inventory

➔ Insert the item number and **quantity being purchased** and select **[Add]**.

Conveyorware Distribution System FMW CONVEYOR  
ADD OTC305RDD

Point of Sale Register Sales

Stock Number.....: 812  
Description.....:  
Quantity.....: 1  
Reg Price.....:  
Discount Amount...:  
Or Discount \$.....:  
Or Discount Price.:  
Serial #.....:  
Category/Class Codes..>  
Country of Manufacture>  
Manufacturer.....>

➔ Complete the information requested and **[Enter]**.

When the item is added, you are ready to collect payment.

➤ **REMEMBER:** The remaining stock of this new item still needs to be added into **Inventory** using **Option 302 Add/Adjust Stock.**

### Collect Payment

Orders may be closed via cash, credit card, or gift card payment.

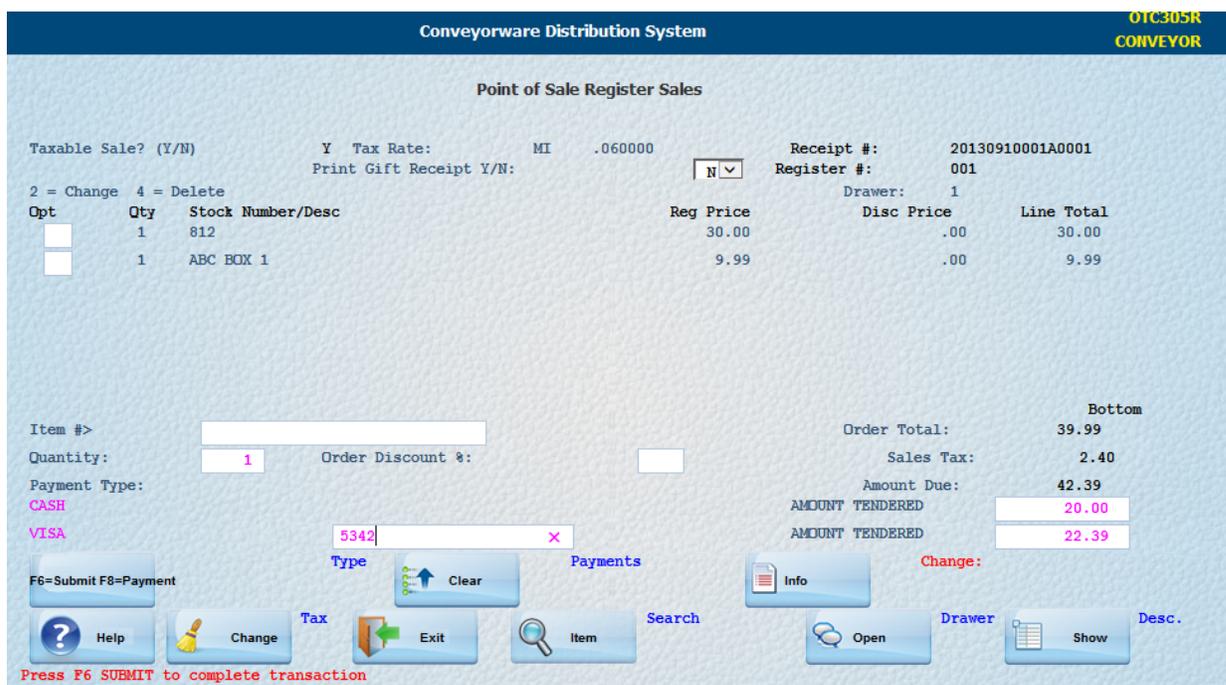
The system defaults to a Cash payment, but if another method of payment is being used

➔ Select [**Clear Payments**] and [**Payment Type**] to Select the appropriate payment method.

**Note:** Multiple payment options may be used, i.e. Cash and Credit Card or Cash and Gift Card etc.

➔ [**Enter**] will insure full payment is received.

➔ [**Submit**] will **finalize** the purchase.



### Close and Balance Cash Drawer

Select: 601: Cashier Checkin/Checkout

➔ Input the Company Number. [**Enter**]

➔ You are now checking **OUT** your cash drawer.

➔ Input the Register number and Drawer being used. [**Enter**]

The screenshot displays the 'CASHIER CHECKOUT' interface. At the top, it reads 'Conveyorware Distribution System' and 'FMW CONVEYOR OTC303R'. The main section is titled 'CASHIER CHECKOUT' and contains the following data:

Category	Item	Value	Register#	Drawer
MISC:	Total Checks Amount:	000 .00	1	
	Credit/Debit Amount:	001 22.39	1	
	Other Payment Forms:	000 .00		
COIN:	Pennies:	<input type="text"/>		
	Nickels:	<input type="text"/>		
	Dimes:	<input type="text"/>		
	Quarters:	<input type="text"/>		
	Dollar Coin:	<input type="text"/>		
BILLS:	1:	<input type="text"/>		
	2:	<input type="text"/>		
	5:	<input type="text"/>		
	10:	<input type="text"/>		
	20:	<input type="text"/>		
	50:	<input type="text"/>		
	100:	<input type="text"/>		
	Other Cash:	<input type="text" value=".00"/>		
	DRAWER IN:	100.00		
	DISBURSE:	625.00-		
	SALES:	179.01		
	DRAWER OUT:	345.99		

This checkout process has been created to avoid fraud. The cash drawer **MUST** be counted and entered into this screen by currency type.

➔ Input the cash by currency. [Enter]

The system will advise the status of the drawer. When it shows "BALANCED"

➔ [Enter] and [Exit]

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Options to be aware of:

**Option 611** – Cash Disbursements available for the payments of inbound products from a vendor. Determination of who is authorized to pay vendors is controlled in option 907.

**Option 612** – Returns with original receipt only.

**Option 613** – Gift Card Activation authorizes gift cards not processed thru the POS system. (example: giving away gift cards without receiving payment for them. Very seldom used.)

**Management will use Option 619 for set up and reporting options.**

**Note:** Use the financial login to finalize any cash disbursements made thru the cash register. See options 142, 143, 180, 181 or 182. IF you do not pay vendors from the cash drawer, you will not use these options.

Reports = 636  
637