

# POS Function List

## Terminal Start

- Terminal Start Login
- Rollover Refresh Date
- Float In Amount
- Cashier Login

## User Interface

- Show/Hide Function Keys
- Cycle through side tabs
  - Summary Tab
  - Cross-Sell Tab
  - Promotions Tab
  - Account Tab (with transaction history)

## Find Product

- Find Product
  - [Show colour and size column](#) <sup>1</sup>
  - Add selected product to sales transaction

## Adjust Item

- Change Quantity
- Delete Item
- Discount – Amount
- Discount – Coupon
- Discount – Percentage
- Price Override
- Employee Discount – Percentage
- Add Comment

## Adjust Transaction

- Resume Transaction
- Suspend Transaction
- Void Transaction
- Attach Reference
- Discount – Amount
- Discount – Coupon
- Discount – Percentage
- Price Override

## Payment

- Cash
- Credit Card
- Debit Card
- Traveller's Cheque (CAD and USD)
- Manufacturer's Coupon
- Foreign Cash
- Gift Certificate
- Credit Note

## Return

- Search by Transaction # (Receipt)
- No receipt
- Search by Serial #
- Search by Customer

## Special Functions

- Reproduce Receipt
  - Search by Transaction #
  - Search by Customer
  - Search by Serial #
  - Print Original Receipt
  - Print Gift Receipt
- No Sale (Open Cash Drawer)
- Quick Pick Configuration

## Cash Management

- Increase Float
- Pay In
- Pay Out
- Pickup for Safe
- Pickup for Deposit

## Media Management

- Pickup Gift Certificates
- Pickup Traveller's Cheques
- Cheque Run
- View Credit Cards
- View Debit Cards

## Admin

- Close Terminal
- Float Out
  - Media Declaration – Cash
  - Declare Foreign Cash
  - Media Declaration – Other Media
  - Close Terminal Report/PDF
  - Bank Deposit Slip/PDF
- System Configuration
- Terminal Quick View
- Store Quick View
- Electronic Journal

## Secure Terminal

- Secure terminal
  - Display promotional image/video
- Cashier Login

## Time and Attendance

- Attendance sign-in/sign-out

## Quick Links

- Desktop
- Hot Keys
- Change Password
- Launch Browser
- Work Schedule
- Attendance

## Other

- Attach Sales Rep
- Customer Information
- Manager Override
  - Exchange
  - Refund
  - Discounts

# Store Manager Function List

## ADMIN/BACK-OFFICE

### Product Management

- Product Categories
- Product Category Hierarchy View
- Product Profiles
  - Product Colour, Size & Style <sup>1</sup>
- Product Labels

### Promotion Management

- Promotions
  - Product Promotion
  - Category Promotion
  - Combination Promotion \*
  - Tier Promotion \*
- Discounts
  - Line Discount – Amount
  - Line Discount – Percentage
  - Line Discount – Override
  - Line Discount – Employee
  - Transaction Discount – Amount
  - Transaction Discount – Percentage
  - Transaction Discount – Override
  - Transaction Discount – Employee

### Inventory Management

- Inventory Levels
- Adjust Inventory
- Adjustment History

### Count Inventory

- Create Count Sheet
- Count Inventory
- Reconcile Inventory
- Reconciliation History

### Order Management

- Manufacturers
- Suppliers
- Purchase Orders
- Auto Replenishment
- Purchase History

### Receive Products

- Receive Products
  - Specify lot # and expiry date <sup>2</sup>
- Receive History

### RMA \*

- Process RMA \*
- RMA History \*

### Staff Management

- Manage Employee
- Reset Password
- Change Password
- Staff Availability
- Work Schedules
- Attendance

### Client Management

- Client Profiles
- Client Reports
  - Customer Purchase History
  - Customers by Product

- Products by Customer
- Customer Ranking
- Birthdays
- Customer Care
- Service Notes
- Client Service Notes

### Store Management

- Store Information
- Licence Information
- User Roles
- Role-Function Setup

### POS Management

- Tax Rates
- Exchange Rates
- Receipt Message
- Function Keys
- Reason Codes
- Activation Codes

### System Admin

- System Defaults
- Backup/Restore Database

## REPORTS

### Product Management Reports

- Category Report
- Product Pricing History
- Product Purchase History

### Inventory Reports

- Inventory Level
- Inventory Reconciliation Report
- Serialized Product Report
- Soon-to-Expire Product Report <sup>2</sup>
- Expired Product Report <sup>2</sup>
- Inventory Valuation

### Sales Reports

- Sales Summary
- Sales Transactions
- Terminal Summary
- Daily Banking Summary
- Credit/Debit Card Transaction Summary
- Activation Report
- Float Report
- Credit Note Report
- Bank Deposit Report

### Sales Analysis Reports

- Product Sales
- Discount Report
- Promotion Report
- Return Analysis
- Tax Payable Summary
- Electronic Journal
- Hourly/Weekly Sales Summary \*
- Operational Matrix \*
- Top 10 Employee Sales Summary \*
- 10 Best/Worst Product Sales Summary \*

### Accounting Reports

- Monthly Accounting Sales Summary