

# Point Of Sale Entry

Point Of Sale Entry view allow user to process retail sales transactions, issue and redeem vouchers. Below actions are available under Point Of Sale Entry:

- Create new sales transaction
- Cancel approved sales transaction (admin only)
- Delete drafted/pending sales transaction
- Hold sales transaction (pending)
- Recall (pending) sales transaction for payment
- Recall sales transaction to print receipt
- Lock & unlock cash register
- Issue gift voucher
- Check store(s) stock
- Close POS (cash register)
- View and search for sales transaction



Field Name	Description	Mandatory Information
Date	Date of the sales transaction	Y
Receipt	Receipt number of the sales transaction	Y
Cash Register	Cash register code and name	Y
Ticket Register	Ticket grouping number for a session of opened cash register until it is closed. This is used as reference number for Point of Sale invoice posting	Y

Cashier	Cashier's name	Y
Sales staff	Sales staff who attended the customer	N
Customer	Registered customer's name	N
Loyalty Join On	Date when customer joined store's loyalty program	N
Points	Customer's loyalty points balance	N
Document Note	Additional note on the sales transaction	N
#	Product / item line number in the sales ticket	Y
Barcode	Barcode of the product	Y
Description	Description of the product	Y
Quantity	Quantity of the product customer is purchasing / returning	Y
Unit Price	Unit price per product	Y
Discount	Discount (% or amount) per product	Y
Nett Price	Nett price per product	Y
Total Amt	Total amount of the product customer is purchasing / returning after discount	Y
Add Points	Add (loyalty) points for registered customer for purchase of the product	Y
Sales Amt	Total value of sale of products for the transaction	N
Sales Returns Amt	Total value of returned of products for the transaction	N
Total Qty	Total number of quantity of products for the transaction	Y
Total Amt	Total amount for the transaction (sale and return)	Y
Total Tax	Total tax for the transaction (sale and return)	Y
Discount	Total discount for the transaction	Y
Grand Total	Total amount for the transaction after discount (sale and return)	Y
Cash Received	Total cash received for the transaction	Y
Change Amount	Total amount of change to customer for the transaction	Y

## Create New Sales Transaction

1. Click on **"Open POS"** (if not yet opened) button at the bottom of screen, it will open the cash register ready for transaction. Cashier to confirm the cash opening balance when opening the point of sale (cash register).



Once opened, the **"Open POS"** button will change to

**“Close POS”** button

2. Select **“Sales Staff”** and **“Customer”** from drop down list where available, or using the buttons at the bottom of screen



3. Fill up sales transaction information by using barcode scanner or manually enter the product's barcode or name in the Barcode textfield under the **“Sales”** tab in the middle of screen.

For manual sales transaction entry, cashier staff can search for a product by entering search parameter (i.e. partial product's barcode or name) in the **“Barcode”** textfield under **“Sales”** tab, and hit the ENTER button. A **“Select Product”** window will pop up. Select a product from the list using mouse double-click, the product information will fill up the **“Sales”** record table.



4. Once a product line entered, system will show available quantity in the store for the product. Cashier can modify the quantity for the entered sales line by selecting the sales line to be updated. Cashier can also modify discount and unit price, if he / she is given the access rights to do so. (see **Organization (Masters) – Roles, Access Rights**)



Repeat steps 3-4 for additional sales items

5. Customer can also make return of product sold at the same time during the sales. Cashier to enter the returned product in the **“Returns”** tab. Returns can be done by receipt or product.

For sales return by product, scan / enter the product barcode in the **“Returns”** tab line.



For sales return by receipt, find the receipt by entering the receipt number\*, and select which

product to return.

**\*Note:** Sales return by receipt can only be done during the same session of POS Entry. If the POS session with the receipt has been closed, cashier can only process the sales return by product.



6. If there is any promotion relevant to the sales transaction (i.e. period, product, retail customer, store, total amount, etc.), any free items and discount will be calculated during the ticket payment (click **"Pay"** button) or when the ticket is put on hold (click **"Hold\Create"** button).

Click on **"Pay"** button at the bottom of screen to make payment, the **"Payment for Ticket"** window will show up.



7. Fill up textfield with payment amount next to the appropriate payment method. Click on the payment mean button to pay in full using one payment mean. Customer can choose to pay using voucher or multiple payment means.



7. Click on **"OK"** button at the bottom of **"Payment for Ticket"** screen to complete sales transaction. The POS ticket will be printed on the ticket printer.



## Cancel Approved Sales Transaction (Admin Only)

1. Click on "**Open POS**" (if not yet opened) button at the bottom of screen
2. Click on "**Recall**" button at the bottom left of screen
3. Select **Status** as **Approved** from drop-down list at top-right side of screen



4. Select an approved sales ticket transaction to be cancelled from the list in the table, then double-click on it or click the "**Recall**" button on the bottom-right of the pop-up window
5. Click on "**Undo**" button at the bottom of screen



6. Click on "**Yes**" button on the pop-up window to confirm sales cancellation. The sales ticket status will be pending (draft)

## Delete Drafted/Pending Sales Transaction

1. Click on "**Open POS**" (if not yet opened) button at the bottom of screen
2. Click on "**Recall**" button at the bottom left of screen
3. Select **Status** as **Drafted** from drop-down list at top-right side of screen



4. Select a drafted sales ticket transaction to be deleted from the list in the table, then double-click on it or click the "**Recall**" button on the bottom-

right of the pop-up window

5. Click on **“Delete”** button at the bottom of screen

6. Click on **“Yes”** button on the pop-up window to confirm sales record deletion

## Hold Sales Transaction (Pending)

1. During sales transaction, click on **“Hold\Create”** button at the bottom of screen, it will save the current transaction and create a new one

2. Click on **“Recall”** button at the bottom left of screen to recall back the pending sales transaction



## Recall (pending) Sales Transaction for Payment

1. Click on **“Open POS”** (if not yet opened) button at the bottom of screen

2. Click on **“Recall”** button at the bottom left of screen

3. Select a drafted sales ticket transaction to be deleted from the list in the table, then double-click on it or click the **“Recall”** button on the bottom-right of the pop-up window



4. Enter search parameter to filter the result, i.e. type in customer name in the search textfield box, at top right of screen

5. Result can be sorted alphabetically by clicking the fields' columns

6. Click on **“Pay”** button at the bottom right of screen to make payment for the recalled sales ticket

## Recall Sales Transaction to Print Receipt

1. Click on **“Open POS”** (if not yet opened) button at the bottom of screen

2. Click on **“Sales History”** button at the bottom left of screen

3. Enter search parameter to filter the result, i.e. type in customer name in the search textfield box, at top right of screen



4. Result can be sorted alphabetically by clicking the fields' columns

5. Select an approved sales transaction from the list of tickets in the table to print receipt. Double-click on the sales transaction record to see the ticket's details

7. Click on print  button at the top of screen to print receipt



## Lock & Unlock Cash Register

1. Click on **“Lock”** button at the bottom of screen and click **“Yes”** button



2. Enter (current) user's login password to unlock the cash register



## Issue Gift Voucher

1. Click on **"Open POS"** (if not yet opened) button at the bottom of screen
2. Select **"Sales Staff"** and **"Customer"** from drop down list where available, or using the buttons at the bottom of screen
3. Click on **"Gift Voucher"** button at the bottom of screen
4. Fill in details of the gift voucher and click **"OK"**



button

5. Click on **"Pay"** button at the bottom of screen to make payment, **"Payment for Ticket"** form will show up. Fill up textfield with payment amount next to the appropriate payment method
6. Click on **"OK"** button at the bottom of **"Payment for Ticket"** screen to complete sales transaction

## Check Store(s) Stock

1. Click on **"Stock"** button at the bottom of screen
2. Enter search parameter to filter the result, i.e. type in product name in the search textfield box, at bottom of screen. Click **Search** button to refresh the search result.



3. Click on **"OK"** button at the bottom of screen to close the Stock Details window

## Close POS (Cash Register)

1. To close the cash register at the end of the sales day, click on **"Close POS"** button at the bottom of screen

2. If there is any pending ticket(s), cashier can delete the tickets. Click **Recall** button and delete the ticket(s).

3. Cashier to enter the counted amount for each payment means in the "Close Cash Counter" window. Click on **"OK"** button at the bottom of screen when done.



If the entered counted amount does not match with the current balance, system will prompt warning to cashier if he/she still want to proceed with closing.



If closing difference is not allowed in the G00MI setting, cashier to contact store manager to resolve the POS closing difference.



4. Store manager can print the **"Point of Sales Closing"** report from "POS (Transactions) – Control Point of Sale"



## View and Search for Sales

# Transaction

1. Click on "**Open POS**" (if not yet opened) button at the bottom of screen
2. Click on "**Sales History**" button at the bottom left of screen
3. Enter search parameter to filter the result at "**Ticket List**" tab, i.e. type in customer name in the search textfield box, at bottom of screen



4. Result can be sorted alphabetically by clicking the fields' columns
  5. Double-click sales transaction record to view more details, it will be shown on "**Ticket Details**" tab
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