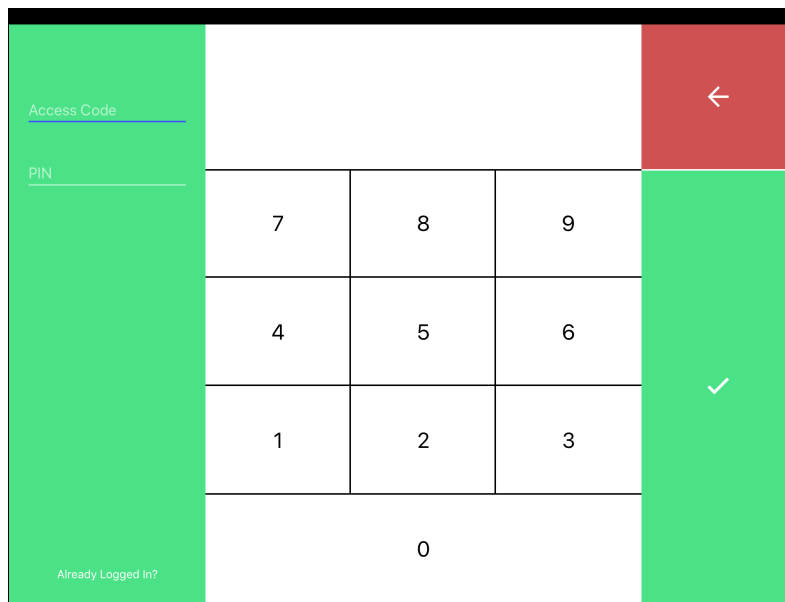


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Log In Screen



The log in screen features a green sidebar on the left with the text "Access Code" and "PIN" above input fields, and "Already Logged In?" at the bottom. The main area contains a numeric keypad with digits 0-9. A red button with a left arrow is at the top right, and a green button with a checkmark is on the right side.

<div>Access Code</div> <div>PIN</div> <div>Already Logged In?</div>				←
	7	8	9	✓
	4	5	6	
	1	2	3	
	0			

Figure 1

When to Open a Terminal

Terminals should be opened at the beginning of a day and/or shift.

Access Code & PIN

There should be a unique access code & PIN for each employee. This combination provides access to the point of sale system and grants specific permissions to a user.

Main Menu

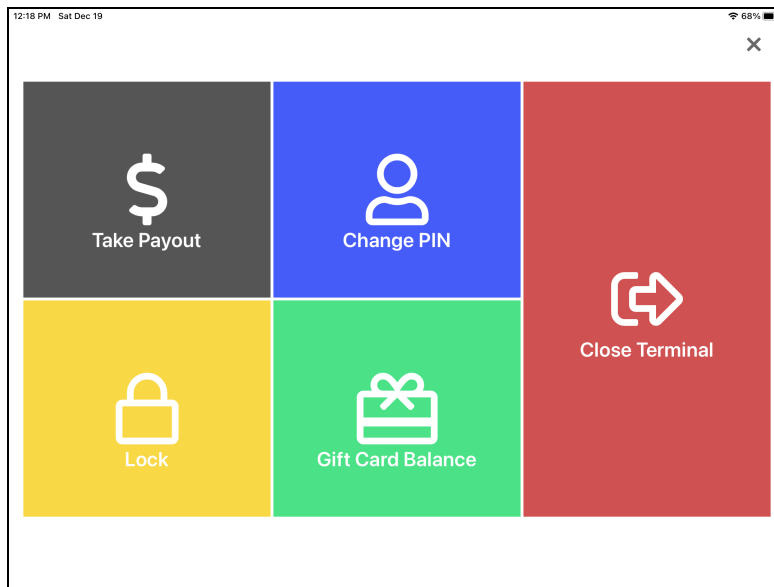


Figure 2

Take Payout

This function allows a payout from the existing drawer. If logged in as a sales associate, a manager override will be necessary.

When you click on it, the screen below will appear. Enter the amount to be taken from the register and press **Confirm**.

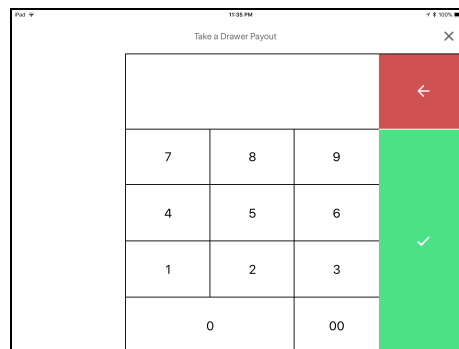


Figure 3

Change PIN

This function changes the PIN for the active user. When you click on it, the screen below will appear. A PIN must be at least four numerals in length. The user's old PIN will no longer be valid.

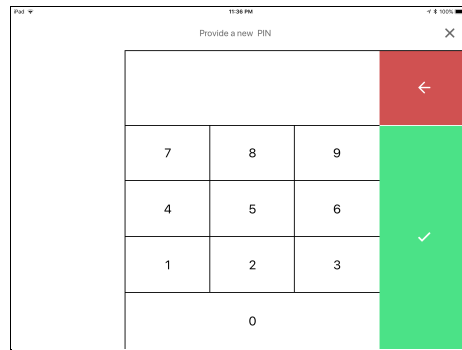


Figure 4

Lock

This function locks the point of sale system without closing the terminal. The active user is required to enter his or her PIN to use the point of sale system. If the point of sale system is left idle for too long or the user intentionally locks the terminal from the main menu, the user will have to unlock the terminal before it can be used again. A locked terminal does not affect anything already completed or in process in the point of sale system.

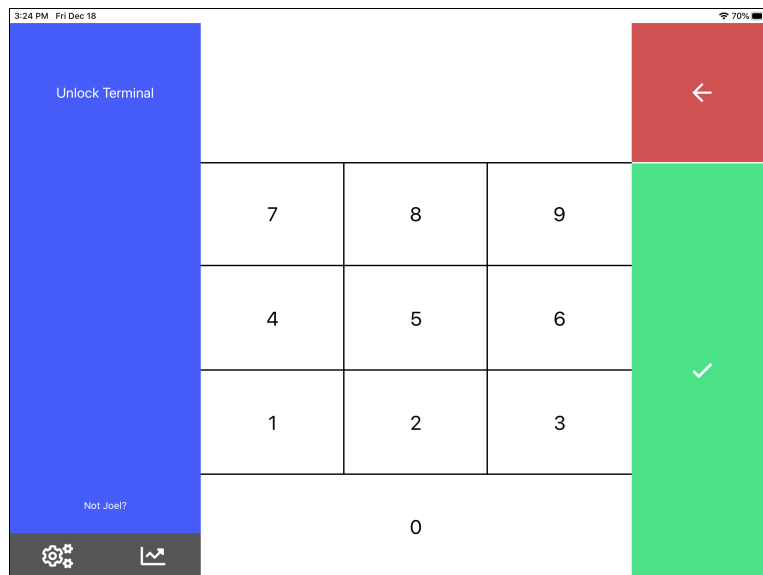



Figure 5

Store Performance

This function displays daily totals for the current location. (See **Store Performance** page for details by clicking ).

Sales

Net sales is the total amount sold for the current day (sales tax is not included). **Sales Transactions** is the number of individual sales completed for the current day.

Refunds

Refunds is the total amount refunded for the current day (sales tax is not included). **Refund Transactions** is the number of individual refunds completed for the current day.

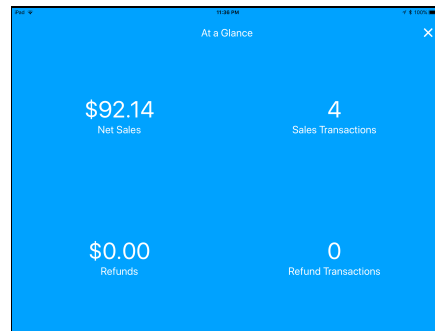


Figure 6

Credit Card Terminal IP Address

In order for the credit card terminal to function properly, you must input the IP address of the corresponding terminal into OnTrac. To do this, press the Settings button in the app on the lock screen in the bottom left corner.

Close Terminal

This function logs out the current employee and closes the drawer. The cash drawer is automatically opened to remove funds for reconciliation. **Terminals should be closed at the end of each day and/or shift.**

Sale Menu

Sale

This function directs the user to the Sale Screen. Select the **Sale** tab on the Sale Menu to get to the Sale Screen.

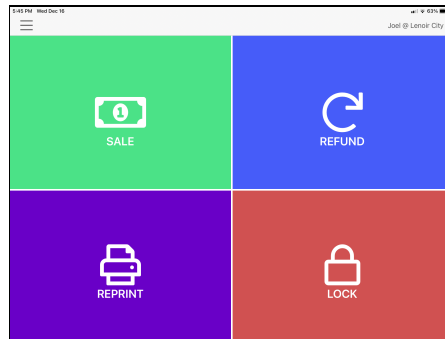


Figure 8

1. Returning or New Customer
 - a. Pressing **Skip** takes you to the Sale screen.

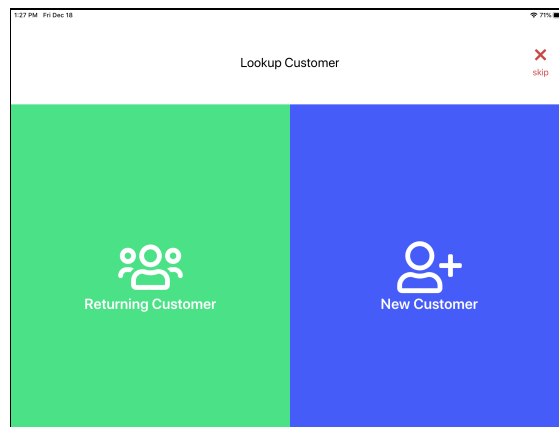


Figure 9

- b. Returning Customer

The customer can input his or her phone number OR email.

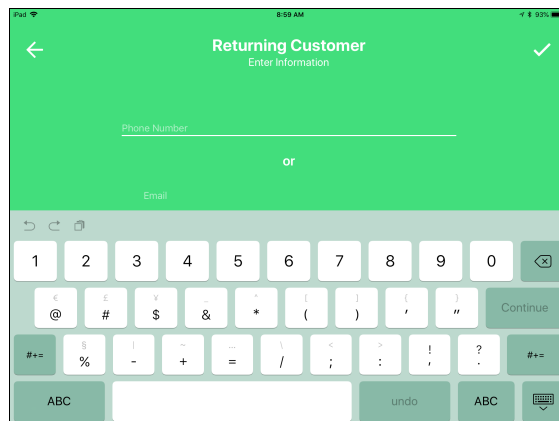


Figure 10

c. New Customer

The customer must enter each field accurately.

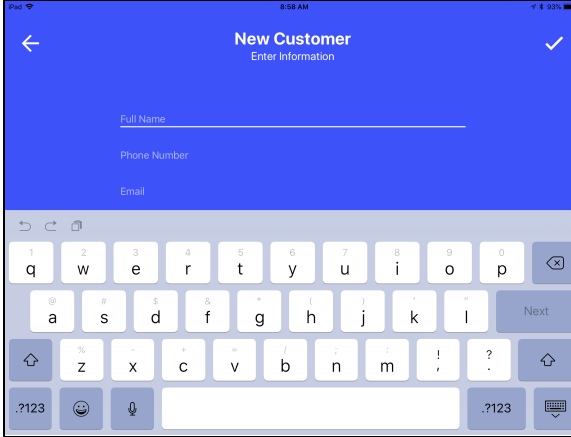


Figure 11

2. Select the category of the item being purchased.

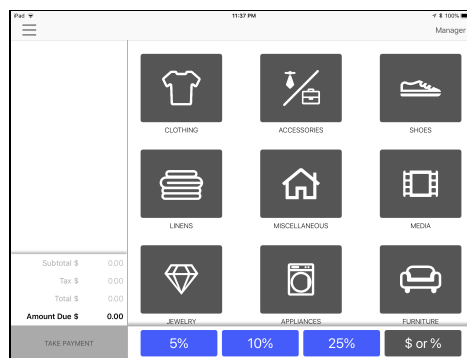


Figure 12

3. Enter the quantity of items for the selected category and, if using open pricing for items, the same price.

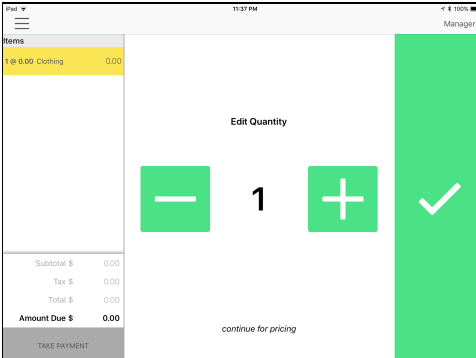


Figure 13

4. Enter the price.

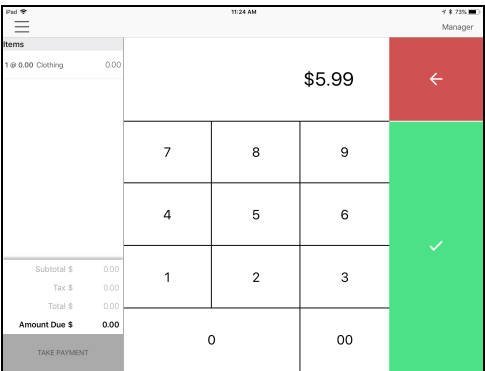


Figure 14

5. On the Sale Screen, the user may add items of the same category and price by pressing the item on the Items list and increasing the amount.

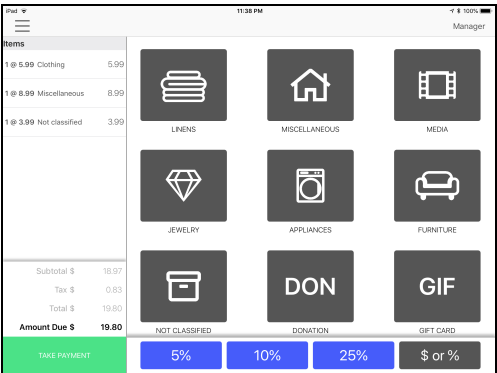


Figure 15

To receive a donation, press the Donation category and enter the amount.

NOTE

If a customer donates change after taking payment, it must be recorded separately and can be accounted for at the end of the day with similar donations.



Figure 16

6. Add discounts or coupons.

Press one of the blue discount buttons at the bottom of the screen to discount the entire order. If the desired percentage is not located on one of the buttons, press the “\$ or %” button to the right of the blue discount buttons.

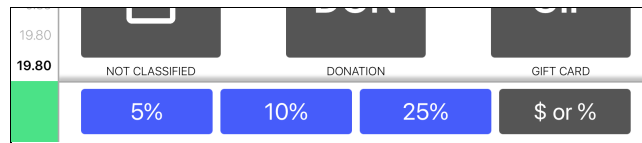


Figure 17

a. Press **Order**.

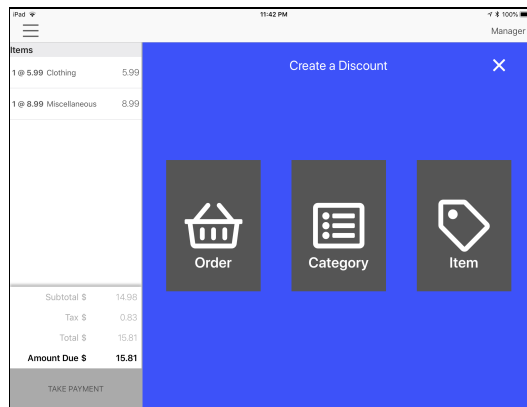


Figure 18

- i. Update the discount type as \$, if needed, using the toggle.
- ii. Enter the desired discount and confirm.

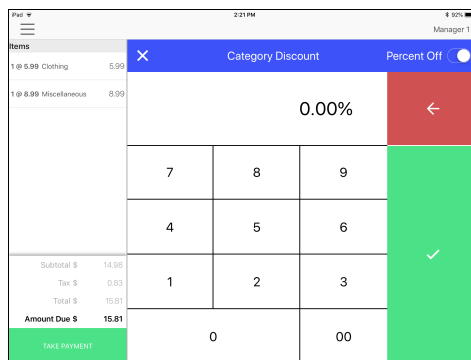


Figure 19

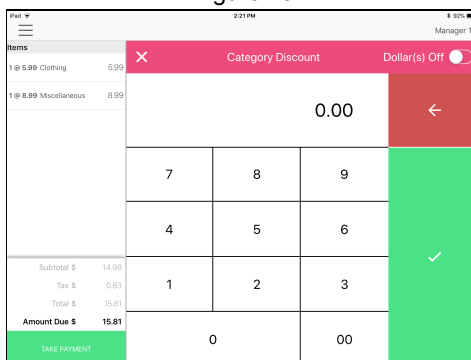


Figure 20

- b. To discount a certain category, press the **\$ or %** button, then **Category**
 - i. Press **Category**.
 - ii. Select the desired category.

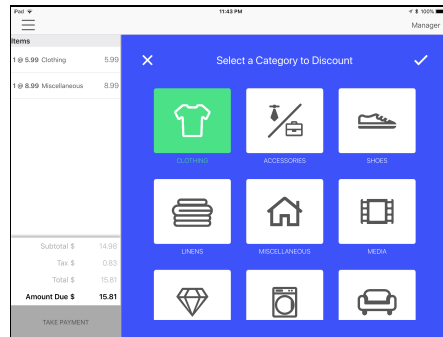


Figure 21

- iii. Update the discount type as \$, if needed, using the toggle.
 - iv. Enter desired discount and confirm.
- c. To discount a certain category, press the **\$ or %** button, then **Item**
 - i. Select the desired item from the entered items on the receipt.

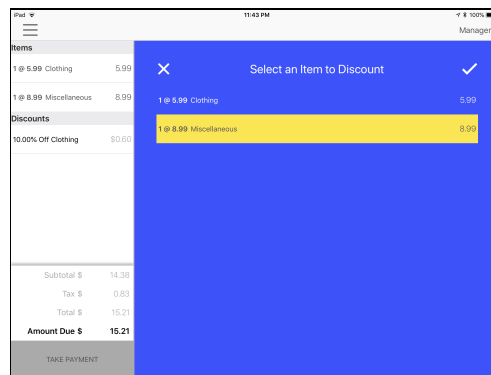


Figure 22

- ii. Update the discount type as \$, if needed, using the toggle.
 - iii. Enter desired discount and confirm.

7. Take payment.

Press **Take Payment** and the following screen will appear.

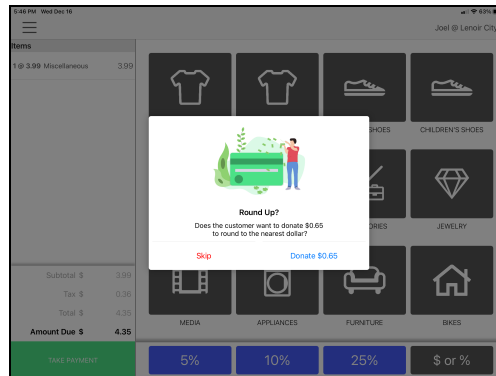


Figure 23

a. Ask for Donation

- i. Ask the customer if they would like to round up to the next dollar.
- ii. If the customer elects to round up press the Donate button. Otherwise, press Skip.

b. Cash

- i. If the cash button is pressed without partial payment being applied, then the amount of cash entered must be greater than or equal to the total.
- ii. The green buttons on the left side of the screen are short cuts for common amounts.

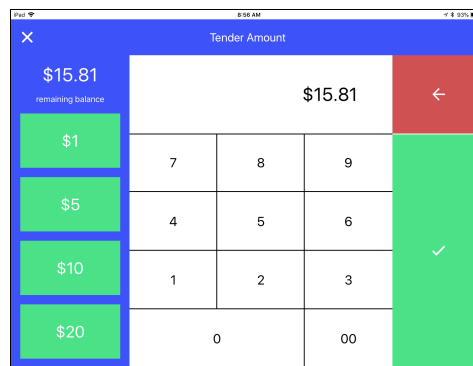


Figure 24

- iii. Once the correct amount is entered, press confirm and the change due will be displayed at the bottom of the next screen.

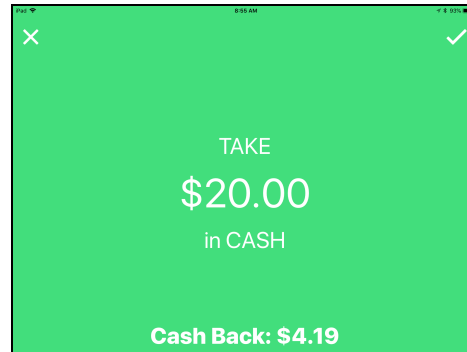


Figure 25

- iv. Press the check in the top right to continue to the receipt page.
 - v. After finishing this, the New or Returning Customer screen will appear.
- c. Credit Card
- i. If credit card button is pressed without partial payment being applied, then the amount will automatically match the total.
 - ii. Press the check in the top right to continue to the New or Returning Customer screen.
- d. Gift Cards and Other
- i. If the Gift Card, Corners Of Your Field, KARM Bucks, or Voucher button is pressed without partial payment being applied, then the amount will automatically match the total.
 - ii. Press the check in the top right to continue to the New or Returning Customer screen
- e. Payments Needing Manager Approval
- i. Any type of payment that requires Manager override requires the Manager to input their PIN and account number.
 - ii. Use same Access Code and PIN as when logging in as a Manager and confirm.

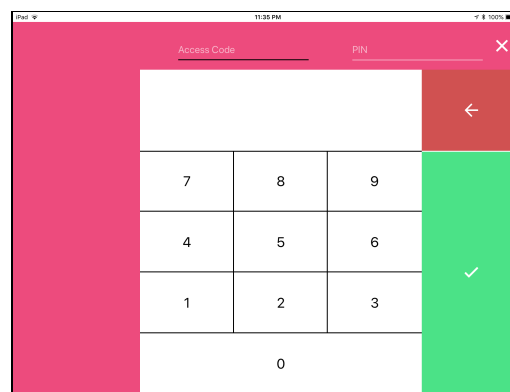


Figure 26

- iii. Press the check in the top right to continue to the New or Returning Customer screen.

f. Partial Payment

- i. To take partial payment, slide the button in the bottom right. The screen will turn red to indicate a partial payment.

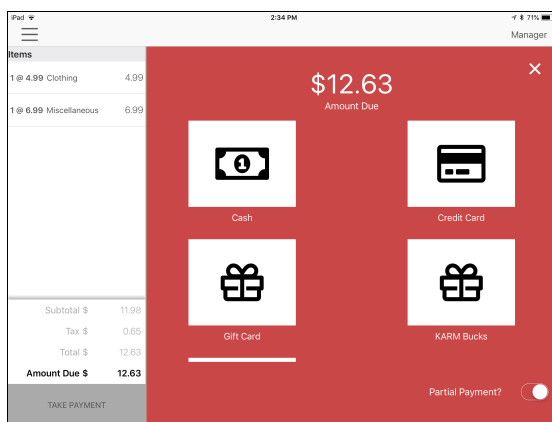


Figure 27

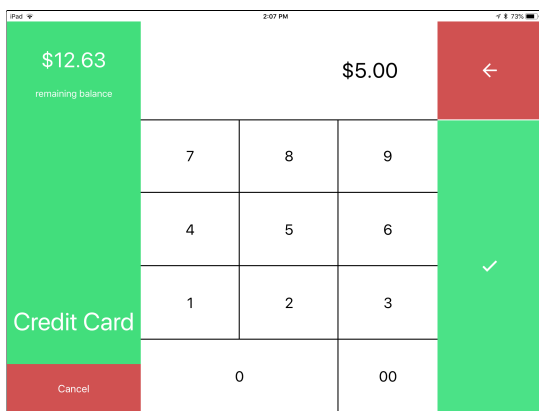


Figure 28- Partial Payment Added

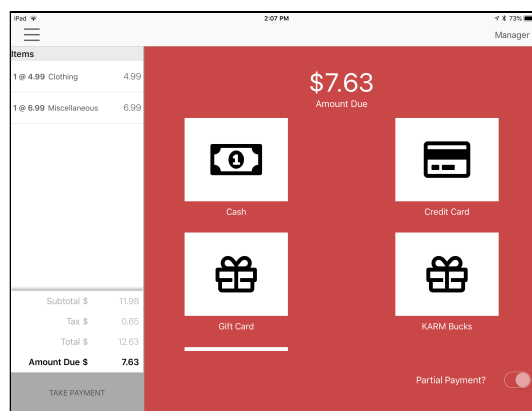


Figure 29- Partial Payment Applied

- ii. If you take a partial payment and wish to void the payment before the transaction is over, you may cancel the transaction and start the transaction over. You can cancel the transaction by clicking the three lines on the top left corner of the screen.

- iii. The user may then take cash, or another form of payment, for the remaining balance.

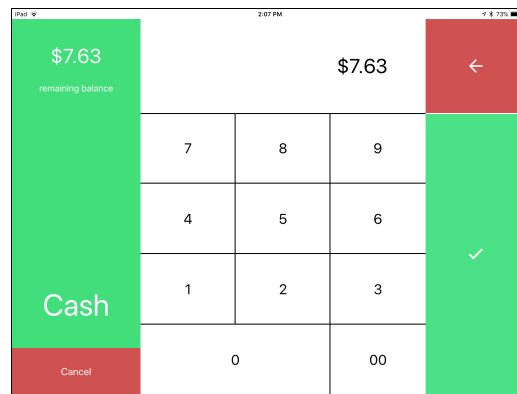


Figure 30

- iv. Press the check on the right to continue to the Receipt screen.

g. Receipt

The customer may then choose to have his or her receipt printed, emailed, or neither.

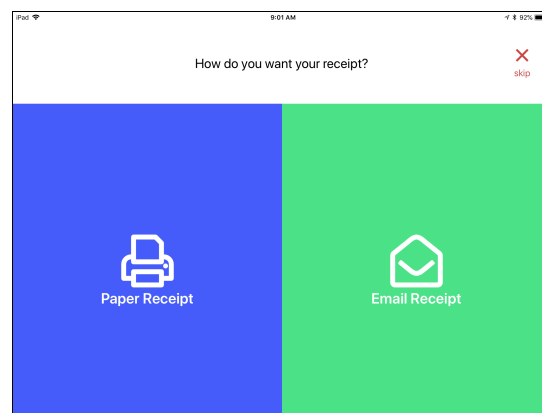


Figure 31

Refunding or Voiding a Sale

This function directs the user to the Refund Screen.

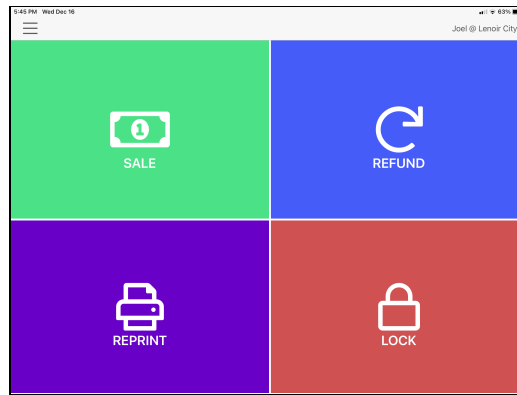


Figure 32

The user may look up a specific sale by ID number, or press skip to enter the return manually. Manager override will be required if logged in as a Sales Associate.



Figure 33

To enter a return manually, select “Skip” on the bottom left of the screen. To complete a void, enter the sale ID and then apply the refund to the original form of payment.

NOTE

Voids are only appropriate when a mistake is made during an original purchase while the customer is present.

Refunds are only appropriate on selected categories.

To complete a refund, enter the sale ID and then apply the refund to a gift card in order to provide a store credit.

Loading a Gift Card

Press the Gift Card category on the Sale Screen and enter the desired amount (If logged in as a Sales Associate, Manager override will be necessary).

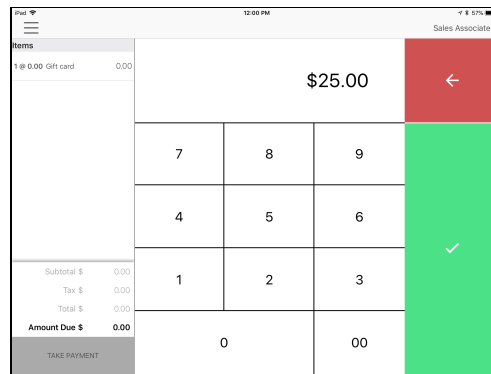


Figure 34

After processing payment, the following screen will appear. Press the arrow and swipe the gift card once the credit card terminal says "Swipe card".

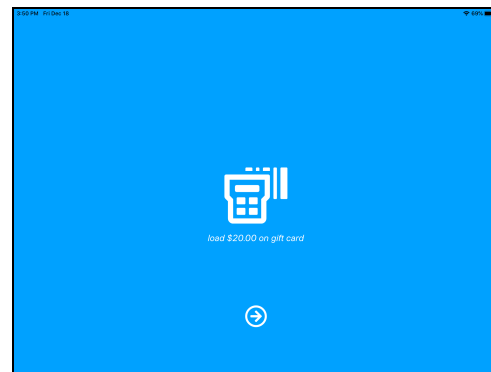


Figure 35

Donations

Credit donations should be taken and logged via the donation button during the transaction.

Cash donations should be taken and logged the same way, after the transaction.

When completing a cash donation transaction, press the Donation button and enter the total amount of cash donations. Then, choose cash as the payment method and enter the exact amount. Press Skip on the Receipt Screen.

Reprint Receipt

Press the **Reprint** button to reprint the previous transaction's receipt.

Lock

This function is the same as the "LOCK" function found on the main menu. This locks the point of sale system without closing the terminal. The active user is required to enter his or her PIN to use the point of sale system. If the point of sale system is left idle for too long or the user intentionally locks the terminal from the main menu, the user will have to unlock the terminal before it can be used again. A locked terminal does not affect anything already completed or in process in the point of sale system.

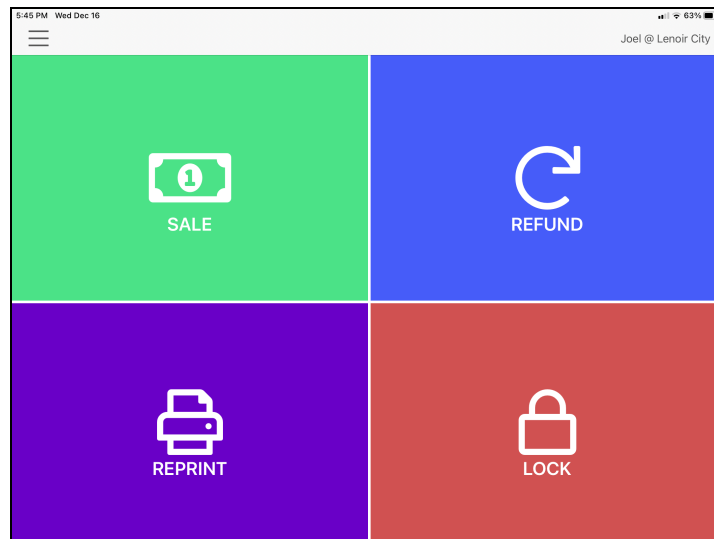


Figure 36