CHECKMATE

POS

USER MANUAL

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Point of Sale

Introduction

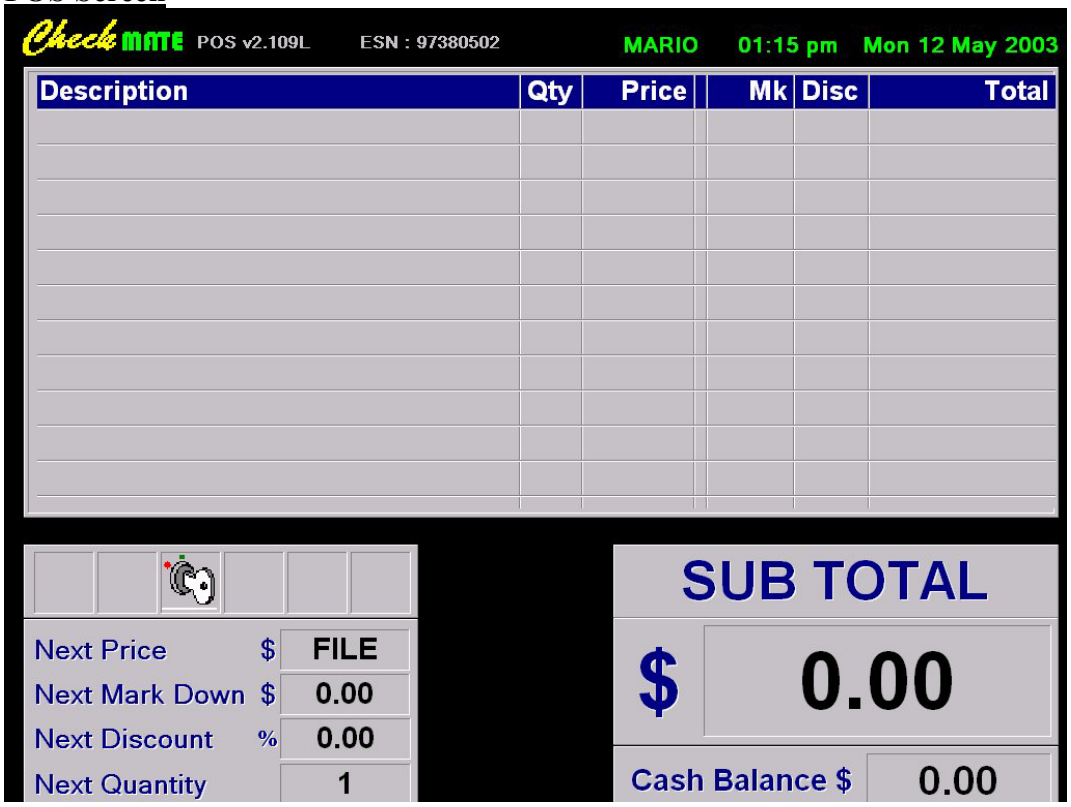
The Point of Sale component of a Checkmate Liquor Store incorporates: multiple user logons, multiple payment methods, item search features, in-depth diagnostic functions and user friendly keyboard setup.

By using the contents page, step by step processes and reading the useful hints on easy operation in this manual, running your day to day POS will be a breeze.

POS Architecture

The basic point of sale architecture is made of a POS screen, POS keyboard, cash draw, scanner and receipt printer. Optionally you can add a customer display, additional cash drawers and scale.

POS Screen



POS Keyboard Left Side

POS Keyboard Right Side

Start Up POS

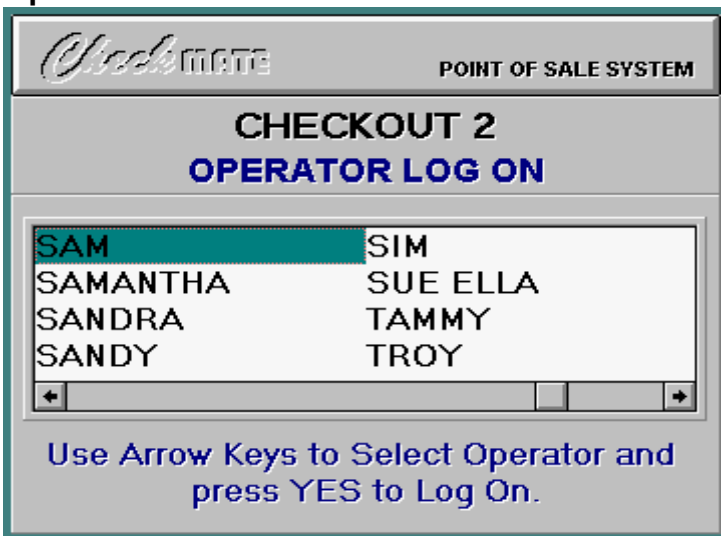
The start up of POS is depends on how the system was shutdown. If the end of day process was done properly, all the POS terminals will be in sleep mode, and the next morning they will automatically wake up. If the end of day wasn't completed and the POS was shutdown, the POS will have to be manually turned on in the morning. When the log on screen comes up the user must press the "YES/Enter" button and enter the shutdown password to restart POS.

Logging ON/OFF

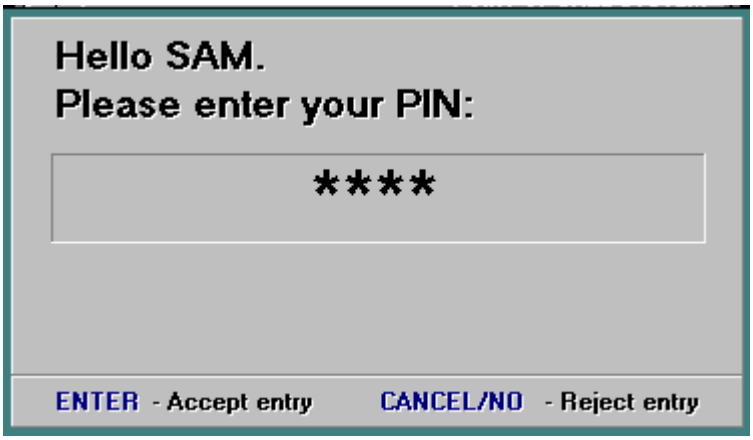
Users can be logged on or off by different methods, the Logon/Logoff buttons can be used, a cashier selected and their pin entered manually, or you can print off pass cards which are scanned by the scanner to log a user in. Its recommended that users are logged off any unattended lanes.

Log In Screen

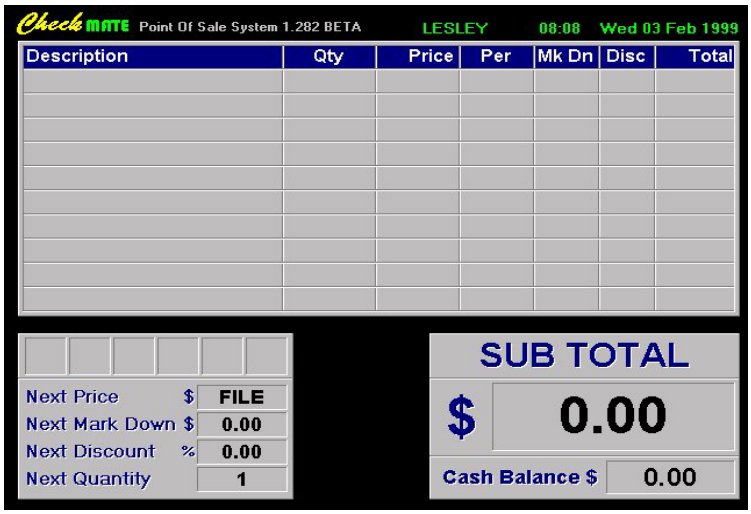
Operator Selection Screen



Pin Security



Main Point of Sale Screen



Scanning/Inputting Items

There are four ways of inputting items into POS:

1. Scanning item using barcode.
2. Using the item APN/PLU number and then pressing Enter/Yes.
3. Searching the Inventory database. This is explained in the "Searching" section.
4. Pressing fast buttons on POS keyboard.

Payments

There are many payment methods that customers can use, as well as the ability to use a combination of payment methods to finalise they bill. The methods we will take you through are: cash, EFTPos, cheque, voucher, charge and frequent shopper credits.

End of Sale Screen

Cash

Payment by cash can be done in a few easy ways: fast cash tender keys or amount inputted using number keypad. The amount accepted is in accordance with definable rounding rules.

Press Fast Cash tender keys that represent cash received.
Or
Enter the amount received and press CASH button
Or
Press CASH button (amount will be pre-filled) then press YES/Enter.

EFTPos

The three most used methods are described below. Multiple EFTPos card types can be setup at Back Office.
Purchase only (No cash out)

1. Press EFTPos button.
2. Total amount displayed. Press YES/Enter.
3. Enter nothing. Press YES/Enter.
4. Are the EFT amounts correct? Press YES/Enter to process or NO/Cancel to look at alternative payment methods.
5. Select applicable card type. Press YES/Enter
6. After total payment, sale complete.

Purchase + Cash out (Cash out on top of sale amount)

1. Press EFTPos button.
2. Total amount displayed. Press YES/Enter.
3. Enter cash out amount. Press YES/Enter.
4. Are the EFT amounts correct? Press YES/Enter to process or NO/Cancel to look at alternative payment methods.
5. Select applicable card type. Press YES/Enter

6. Give cash out amount to customer.
7. Sale complete. Give cash out amount to customer.

Purchase + Cash Out (Cash out and sale amount combined to equal a dollar amount)

1. Enter total amount customer wants to come out of card.
2. Press EFTPos button.
3. Cash out automatically worked out. Press YES/Enter.
4. Are the EFT amounts correct? Press YES/Enter to process or NO/Cancel to look at alternative payment methods.
5. Select applicable card type. Press YES/Enter
6. Give cash out amount to customer.

Cash out Only (No Purchase)

1. Press the EFTPos button.
2. Enter the Cash out amount and Press YES/Enter.
3. Are the EFT amounts correct? Press YES/Enter to process or NO/Cancel to look at alternative payment methods.
4. Select applicable card type. Press YES/Enter
5. Give cash out amount to customer.

Cheque

Cheque payments can easily be broken down into new customers, old customers and customers that want cash out on purchase. With new customers, the customer must be approved by the supervisor.

Old Customer cheque

1. Enter amount tendered by cheque. Press CHEQUE button.
2. Enter cheque account number. Press YES/Enter.
3. After total payment, sale complete.

New Customer cheque

1. Enter amount tendered by cheque. Press CHEQUE button.
2. At cheque account number screen. Press YES/Enter.
3. Press NO/Cancel.
4. Enter Supervisor password. Press YES/Enter.
5. After total payment, sale complete.

Cash with purchase cheque

1. Cheque is over the price of the purchase, so cash back will apply.
2. Enter amount tendered by cheque. Press CHEQUE button.
3. Enter supervisor password. Press YES/Enter.
4. Enter cheque account number. Press YES/Enter.
5. Sale complete, change given.

Voucher

This method finalises a sale against a predefined voucher or coupon type. Vouchers can be defined to allow or disallow change to be given. All types of vouchers can be set up through Checkmate Back Office.

1. Enter voucher value tendered.
2. Press VOUCHER button.
3. Use arrow keys to select Voucher type. Press YES/Enter.
4. A confirmation screen will come up asking you to confirm that you know that no change is given. Press YES/Enter.
5. After total payment, sale complete.

Charge/Account

This will let you finalise a sale against a predefined debtors account list. This is set up using Checkmate Back Office.

1. Press CHARGE button.
2. Enter Accounts Telephone number and press YES/Enter, or type the customers name on the keyboard.
3. Select Account and press YES/Enter.
4. Enter amount to be charged to account. Press YES/Enter.
5. After total payment, sale complete.

Frequent Shopper

The frequent shopper can convert the points to cash to pay for their shopping. This will be explained in the Frequent Shopper section.

Discounts

There are four discounts that can apply to a sale item. A discount will give a percentage discount, a markdown will give a dollar discount, giveaway will make the item free, and promotional items show up as a dollar discount. Multiple discount types can be defined at store level. All discounts are displayed on the POS screen as markdowns or discounts and at the bottom of the screen you can see total discount (total is calculated by adding discount plus markdown in dollar value).

Discount Mode

This discount mode will put a percentage discount on all future items that are inputted. Recommend for supervisor use only.

1. Press DISC Mode button.
2. Enter Supervisor password and press YES/Enter.
3. Choose predefined Discount Type. Press YES/Enter.
4. The discount type will apply to ALL FUTURE ITEMS.

Turning off Discount Mode

1. Discount Mode must be on at this stage.
2. Press DISC Mode button.
3. Enter Supervisor password and press YES/Enter.
4. Dialog box should say that Discount Mode is turned off.

Discount Sale

This discount mode will put a percentage discount to all items which have been entered into the sale up to date.

1. Scan item/s to be discounted.
2. Press the DISC SALE button.
3. Choose predefined Discount Type. Press YES/Enter.
4. The discount type will apply to ALL EXISTING LINES.

Discount Line

This discount mode will put a percentage discount to the item that is current.

1. Use the arrow keys to select an Item.
2. Press the DISC LINE button.
3. Choose predefined Discount Type. Press YES/Enter.
4. The discount type will apply to CURRENTLY SELECTED LINE.

Discount Next

This discount mode will put a percentage discount to the next item that is scanned.

1. Press the DISC NEXT button.
2. Choose predefined Discount Type. Press YES/Enter.
3. The discount type will apply to NEXT ITEM.
4. Scan item.

Give Away

This discount mode will give away the item that is current. The Item will appear with no price.

1. Use the arrow keys to select an Item.
2. Press the GIVE AWAY button.
3. Enter Supervisor password and press YES/Enter.
4. Press YES/Enter to confirm.
5. Item is displayed as having no price.
6. Give Away Mode will turn off automatically.

Mark Down Line

This discount mode will put a dollar discount to the item that is current.

1. Use the arrow keys to select an Item.
2. Press the MARK DOWN LINE button.
3. Enter the dollar value discount to be given. Press YES/Enter.
4. The markdown will apply to CURRENTLY SELECTED LINE.

Mark Down Next

This discount mode will put a dollar discount to the next item that is scanned.

1. Press the MARK DOWN NEXT button.
2. Enter the dollar value discount to be given. Press YES/Enter.
3. The mark down will apply to NEXT ITEM.
4. Scan item.

Price Change

A price change is not a discount in anyway. The price change is used for speed when a product has a wrong price allocated to it, and it isn't an appropriate time to go to Back Office and change the price. There are two ways of changing the price of sale items:

New Price Line

This will change the price on the current item.

1. Use the arrow keys to select an Item.
2. Press the NEW PRICE LINE button.
3. Enter the new price of item. Press YES/Enter.

New Price Next

This will change the price on the next item to be scanned.

1. Press the NEW PRICE NEXT button.
2. Enter the new price of item. Press YES/Enter.
3. Scan item.

Quantity

The quantity keys are used for: Duplicating an item, either by repeating the item or by changing the quantity.

Repeat Last

This will repeat the LAST ITEM.

1. Select item.
2. Press the REPT LAST button.

Quantity Line

This will change the quantity of the SELECTED ITEM.

1. Select item.
2. Press the QTY LINE button.
3. Enter the quantity and then press YES/Enter.

Quantity Next

This will change the quantity of the NEXT ITEM.

1. Press the QTY NEXT button.
2. Enter the quantity and then press YES/Enter.
3. Scan item.

Receipts

The two methods that can be used to look at a previous sale receipt they are: electronic journal which will bring up the sale onto the screen, and reprint receipt which will print of a hard copy.

Electronic Journal

This will bring up all old sale receipts to screen. The receipts are in time order.

1. Press ELEC JNL button.
2. Use the "Fast" Arrow keys to page up and down, and the normal arrow keys to go up and down on the page list. Select your receipt.
3. Press YES/Enter.
4. This will bring up the receipt for that sale.
5. You can continue to search other receipts by using the arrow keys again, or press NO/Cancel to close electronic journal.

Reprint Receipt

This feature lets you reprint any of your last sales.

1. Make sure you are not in a sale.
2. Press the REPRT RCPT button.
3. Use the "Fast" Arrow keys to page up and down, and the normal arrow keys to go up and down on the page list. Select your receipt.
4. Using the arrow keys select a sale.
5. Press YES/Enter, this will reprint the receipt.

Search

Becoming proficient in searching for items is a great skill to have. It will make price checking faster, and finding items that don't scan easier.

Department Search

This search is used to find a product to scan into a sale. It uses the description of the product to do a search.

1. Press DEPT SEARCH button.
2. Start entering the product description using keyboard 2.
3. At any time through step 2, you can use the arrow keys to select your product from the search result list and press YES/Enter.
4. Product is entered into current sale.

Find

This search function will help split up your search into different product departments and than search from there. The find item list is generated from all items that have a PLU number less than six digits.

1. Press FIND ITEM SEARCH button.
2. Press the relevant Department button.
3. Use the "Fast" Arrow keys to page up and down, and the normal arrow keys to go up and down on the page list.
4. Select product and press YES/Enter or enter Index or PLU number and press YES/Enter.
5. Product is entered into current sale.

Price Check

This will bring up information on product description, price, Item No, stock on hand and last sale information.

1. Press PRICE CHECK button.
2. Scan item.
3. The Item No, Item Description and Price will be displayed.
4. You have three choices
    a. Enter product into current sale.
    b. Press Cancel/NO to exit Price Check Mode.
    c. Press PRICE CHECK button to find out Stock on hand and last sale information. Go to step 4.

Frequent Shopper

Frequent shopper is used like any other transaction type, but with the added ability to allocate points and redeem gifts from accumulated points. Frequent shopper parameters can be setup in Checkmate Back Office.

Allocate points

1. Anywhere through the sale. Press FREQ SHOP button, or scan frequent shopper card.
2. This will bring up the search for customer screen. You can use phone number, surname to search.
3. Use arrow keys to select customer. Press YES/Enter.
4. To allocate points, either press 4 on number pad or Press YES/Enter.
5. At the end of sale points will be allocated to customer.

Use Current Credit

1. At the end of adding items to sale. Press FREQ SHOP button.
2. This will bring up the search for customer screen. You can use phone number, surname to search.
3. Use arrow keys to select customer. Press YES/Enter.
4. To use all current credit if require on purchase, press 1 on number pad.
5. All the points that are current will be used.
6. If total payment is covered, sale will be complete, if not other means will have to be used to finalise amount.

Redeem current Credit on Gift

1. At any stage through the sale. Press FREQ SHOP button.
2. This will bring up the search for customer screen. You can use phone number, surname to search.
3. User arrow keys to select customer. Press YES/Enter.
4. To redeem credit on a gift, press 3.

Hold/Recall Sale

This is used for putting a sale on hold so that it can be finalised at a later date. Any number of sales can be held concurrently and can be kept held for as long as is required by the store. A customer telephone number can optionally be recorded against the held sale for review at the Back Office and when the sale is recalled.

Hold Sale

This function holds a sale to be brought up again at a later stage.

1. Put everything that is needed to be into the sale.
2. Press HOLD SALE Button.
3. Sale is saved to be brought back again.

Recall Sale

This function will recall any sales that have been on hold.

1. Press RECALL SALE button.
2. Choose what method you will use to bring up sale.

a. Transaction number. Press RECALL SALE button again and enter Transaction number.
b. Use arrow keys to select sale from list.

3. Press YES/Enter.
4. Sale is brought back to screen. From this you can add more or void or cash off.

Returns

Returns, voids and credits are three various ways of returning stock at different stages of a sale.

Return/Void Sale

This is used to void a sale which is in progress.

1. Through a sale Press RETURN SALE button.
2. A dialog screen will appear asking you to confirm the return sale.

Press YES/Enter to confirm or NO/Cancel to cancel.

Void line

This will void an item from a sale which is in progress.

1. Select item to void.
2. Press VOID LINE button.

Credit Mode

Credit mode returns items back into inventory.

1. Press CREDIT Mode button.
2. Enter Supervisor password. Press ENTER/Yes.
3. Scan products to be returned. The products will come up with a negative price value.
4. When finished Press CASH button.
5. Products are returned.

Credit Next

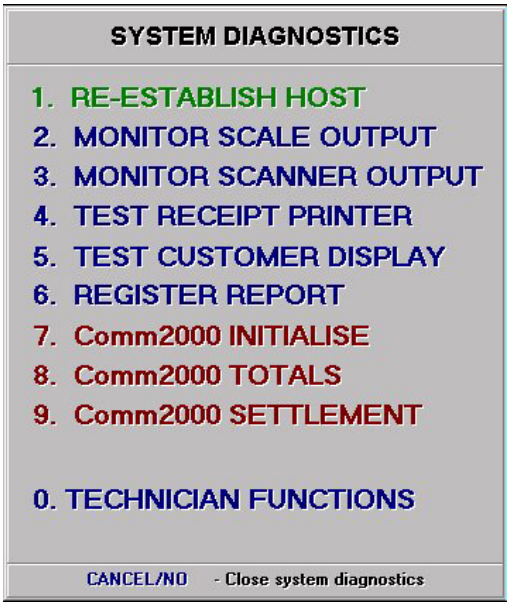
This is used for when you want to return an item at the start or part way through a sale.

1. Press CREDIT NEXT button.
2. Scan item to be credited/returned.

Diagnostics

The diagnostics POS functions are mostly to be used by a trained member of staff or a Check Mate technician. Most operations in this section are used fix any problems that might occur with POS.

System Diagnostics Screen



Re-Establish Host

Re-establish host looks to see if the network has been re-established with the Back Office server, and if it is connects to network.

Monitor scale output

This function will display the item weight.

Monitor scanner output

When you scan an item it will display the item barcode and barcode type.

Test receipt printer

This function will print a test script of characters through your printer to check if they are any faults in the printer. All characters and lines should be printed correctly, if not contact your hardware helpdesk.

Test customer display

This function will print on screen a test script of characters through you customer display to check if they are any faults in the screen. All characters and Lines should display correctly, if not contact your hardware helpdesk.

Register report

This function produces a lane specific register report. The two main sections of this report are the lane total finaliser summary and the cashier/finaliser summary. If a cashier has used more than one lane then totals from all lanes used need to be added together in order to balance at cashier level.

1. Must be not in middle of sale.
2. Press DIAGS button.
3. Select date. Press YES/Enter.

EFT Initialise

This function is only used when point of sale has integrated EFTPos.

EFT Totals

This function is only used when point of sale has integrated EFTPos.

EFT Settlement

This function is only used when point of sale has integrated EFTPos.

Technician Functions

This will bring you to a menu with technician functions

Close Point of Sale

This will close point of sale, and bring you back to the desktop.

Initialize System

This will close point of sale and restart computer.

Repair mirror database

This Section is only to be used by or on direct advice from a Checkmate technician.

System Shutdown

This will close point of sale and shutdown computer.

Repair PFTRAN database

This Section is only to be used by or on direct advice from a Checkmate technician.

Apply local PLUAUX DB

This Section is only to be used by or on direct advice from a Checkmate technician.

Apply local PLU.SAV

This Section is only to be used by or on direct advice from a Checkmate technician.

Store Take Up

Store Take-up is a powerful function allowing the pricing of items on the fly at point of sale. There are two methods to store take-up.

1. Press **Diags** then **0** then **Price Check.**
   Scan the item, press **New Price Line** and enter the price for your item.
2. Create a Supervisor User at Back-office with a Full Name of **STORETAKEUP** Log-on that user (will only work with that user), all items scanned with no current sell price will prompt you for a price, and store the price you enter into the database.

   If you are unsure how to create a User at Back-office refer to the **User Maintenance** section under **Controls** in your Back-office Manual.

Diagnostics Menu

This brings you back to the diagnostics menu.

Pickup

Money can be taken out of the register to pay a contractor, or to limit the amount of cash in the register for safety. Through this method the amount is recorded and will come up when Back Office does the cashier reconciliation at the end of day.

1. Press "PICKUP" button.
2. Enter pickup amount. Press "YES/Enter".
3. This will open the cash register.

No Sale

Records a 'No Sale' and opens the cash drawer.

1. Press "NO SALE" button.
2. This will open the cash register.

Appendix

Glossary

APN/PLU number: Number allocated to item.
Click: Using your mouse press the right mouse button once.
Double Click: Using your mouse press the right mouse button twice.
POS: Point of Sale.
Scan: The term used for inputting an item into the POS, this can be done by scanning barcode or APN/PLU number pad input.
Select: By using the arrow keys on your POS keyboard, you can highlight an item.
Shutdown: Means your computer will turn off properly.
Sleep Mode: Means your computer will power down but not turn off.
Wake Up: Means to bring up your computer to working status again.