

Record a Sale - Option: 1.1



Description of this Option

The register program (recording a sale) is the major data entry point. When recording a sale, type [?] or press [F10] in any field to display useful tips.

Recording a Sale will prompt you to start a register session if one does not exist.

Note: Quickly access Record a Sale by typing [0] at the main Menu.

MEMBER/CUSTOMER LOOKUP

- [####] Member number
- [Last] Search for last name
- [,First] Search for first name
- [*N] New Member (see below)
- [*C] New non-member Customer (see below)
- [C/Last] Non-member Customer lookup by last name
- [C/,First] Non-member Customer lookup by first name
- [.D] Remove Member from sale
- [.E] Display and optionally edit (if allowed) a Member's information
- [EMPTY] Non-member sale

MEMBER FIELD TIPS

- BARCODE Price check
- [.C] Change Cashier initials
- [.G/####] Use Gift Card number
- [.R] Print receipt for last transaction

- [.S] Recall a sale placed on hold ([CTRL-C] to hold sale)
- [.T] Determine Tare Weight
- [.V] Show today's voided sales for quick editable re-ring.

Note: Scanning a barcode in the member field will look up the price.

ITEM LOOKUP

- BARCODE Scan the barcode of an Item
- [####] Enter PLU of an Item
- [=apple] Hot-listed Item starting with "apple" or keyword apple
- [tomato] Starts with "tomato" or keyword "tomato"
- [+tomato] Contains "tomato" in the name
- [-cherry] Exclude Items with "cherry" in the name (use with above)
- [tomato/2] Starts with "tomato" and in Department 2
- [peas/groc] Starts with "peas" in the grocery Department
- [peas/1.99] Starts with "peas" and costs \$1.99
- [peas/>1.99] Starts with "peas" and costs more than \$1.99
- [peas/<1.99] Starts with "peas" and costs less than \$1.99
- [peas/sale] Starts with "peas" and is currently on sale.

Notes:

- 1) Search terms can be combined.
Example: *[+tomato -sauce/grocery]* - Contains the word tomato, doesn't contain the word sauce and isn't in the grocery department.
- 2) Commands can be combined.
Example: *[pizza/<4/1/sale]* - Contains all Items beginning with "pizza" that are on sale for less than \$4.00 and are in department #1.

ITEM FIELD TIPS

- [+] Deposit in
- [-] Deposit out
- [.BC] Bag charge
- [-.BC] Bag credit
- [.G] Purchase gift certificate
- [.D] Delete item
- [/] View Departments
- [*] Apply Donation

PRICE FIELD TIPS

- [10%] Discount item by 10%
- [10P] Discount item by 10%
- [1.99D] Apply Member Discount to this price
- [C] Cost

- [C+10] Cost+10%
- [F] Full price
- [F11] Calculator

QUANTITY FIELD TIPS

- [+] Use scale weight
- [-#] Use scale weight minus tare weight, e.g. [-.03]
- [S] Single (break pack)
- [T-] Remove tax from item
- [T+] Add tax to item
- [####] Use as PLU on next line
- [[C] Case

IOU

Short for 'I Owe You,' an IOU lets a Customer buy now and pay later. When a Customer has an existing IOU, they may pay some, none, or the entire IOU. Some stores require a Customer to pay IOUs within a certain amount of days. This is called IOU aging, and is available when a Customer has outstanding IOUs. Cashiers can view Customer IOUs and select specific IOUs for payment.

Specify Member credit Limits in Option 2.9 (Enter Member IOU Limits).

You can also edit an individual in the Member or Employee database.

A Member/Customer may have only 31 open IOUs at a time.

ADDING A NEW MEMBER AT THE REGISTER

Enter [*N] in the Member field.

For details on adding a Member, see the Member Database (Option 4.4).

Note: A Member with no equity/dues may be signed up at the register without an additional purchase.

ADDING A NEW NON-MEMBER CUSTOMER AT THE REGISTER

Enter [*C] in the Member field.

Maintaining a Customer database is useful mainly for tracking Special Orders and Gift Cards.

FUNCTION KEYS

Additional options are available using the function keys, F1-F12. The function keys are located above the number keys toward the top of the keyboard.

- [F1] Enter more items
- [F2] Accept payment. Press [F2] again for detailed payment method box.
- [F3] Adjust discounts
- [F4] Special Orders, Sales Tax, Dues, IOU, Gift Cards, and Hold Sale
- [F5] Record the Sale
- [F6] Quit without Recording the Sale

- [F7] Return to Member field
- [F8] Apply Coupons
- [F10] View Help
- Type [.S] to recall the sale and resume activity.

Note: "!" after a price indicates a sale price. This appears on receipts as well.

Note: If a screen becomes frozen during Record a Sale, press [CTRL-C] to hold the transaction.

System Constant #12 - Allow Cash Back WITHOUT Purchasing Items (check cashing).

ENTERING MEMBERS

Enter the Member or press [ENTER] if this is a sale to a NON-MEMBER.

If this sale is to a Member, identify the Member by their number, name or fraction of their name. If you only know the first name, preface it with ",". Example: ",Jeremy". If your entry identifies MORE THAN ONE Member, a box showing ALL Members, identified by your response, is displayed and you will be prompted to select the Member from this list.

You can also enter:

- "C/"+Customer Name Specify a Customer
- "G/"+Gift Card# Specify a Gift Card
- "G/" View ALL Open Gift Cards
- "O/"+Ord# Look up by Special or On-Line Order
- "P/"+Phone# Look up Member by Phone#
- ".D" Change this to a Non-Member Sale.
- ".E" EDIT Member Info (See System Constants 157, 174, 175 and 176 in Option 9.2)
- ".I" EDIT or REMOVE initials of the current register owner. ".I" now augments ".C"
- ".L" LOAD from a previous (non-Voided) Sale rang on the same day.
Note: In order to use this feature, System Constant #342 must be set to "Y".
- ".R" PRINT Receipt for the LAST SALE rung on this register
- ".T" Have scale return a weight (handy for unknown Tare Weights)
- ".V" RECALL a Voided Sale
- ".RECALL" RECALL a Sale that was placed on Hold
- ".RETURN" RETURN Item(s) without leaving or having to Recall this Sale.
- ".S" Same as ".RECALL"
- ".X" RELEASE a Sale that was placed on Hold
- "+" List ALL Members
- "-" Return the weight from the scale (useful for customers who bring in their own containers and need the tare weight)
- ".." Redraw the screen

ADD NEW non-member Customers or Members by entering:

- "*C" ADD a NEW Customer
- "*N" ADD a NEW Member

You can also scan an Item to check the Item's Price.

If Integrated Credit Cards are enabled (System Constant #200="Y"), you can check the EBT Balance on a card by pressing the [F11] key.

ENTERING ITEMS

Enter or scan the Item being sold. If you enter the Item, identify the Item by either the Item Code, a fraction of the Item Description, or ANY of the Item's Keywords. Prefix your entry with "=" to use the Hotlist or "R/" to lookup the Item by Receipt Description.

Pressing [F11] will either Price Check the Item entered in this cell or prompt you for an Item to Price Check if no Item is present in this cell.

You can also enter:

- ".D" Remove Item from the sale
- ".BC" Apply Bag Charge
- ".DC" Apply Delivery Charge. Delivery Charge is set up in Option 1.27
- ".DI" (or "+") Apply a Deposit In. Example: *Bottle Deposit*
- ".DO" (or "-") Apply a Deposit Out. Example: *Bottle Deposit REDEMPTION*
- ".G" Purchase a Gift Card
- ".L" View an Item's Location
- ".." Redraw Screen
- "*" Apply Donation

System Constant #86 must be set to "Y". To round the sale up to the nearest dollar, enter "R" in the "Price" Field.

Code"*" Example: *042** Select ONLY Items whose 12 Digit UPC Code starts with what's entered to the left of the "*", i.e. 042. This only happens when what precedes the "*" is a number. For example: *042** Selects ALL Items whose 12 digit Item Code starts with "042".

- "/" View Departments (expedites open rings).
- Text"/"Dept# Select ONLY Item Descriptions that are in that Dept#
- Text"/-"Dept# Select ONLY Item Descriptions that are NOT in that Dept#.
Note: The Text and Dept# can have their order switched.
- "+"Text1"-Text2"/"Dept# Select ONLY Item Descriptions that contain 1st search term that don't contain 2nd search term within specified Dept#.
- Text"/"Brand Select ONLY Item Descriptions of that Brand
- Text"/-"Brand Select ONLY Item Descriptions NOT of that Brand
- Text"/SALE" Select ONLY Item Descriptions currently on sale
- Text"/-SALE" Select ONLY Item Descriptions currently NOT on sale

- Text/Price Select ONLY Item Descriptions that have the price. Example: *PIZZA/9.99* In this example, the price is \$9.99, thus only Items priced at \$9.99 will be shown. You can also affix a ">" or "<" to restrict results to prices greater than \$9.99 or less than \$9.99.
- Text/PLU Select ONLY Items whose code is a PLU
- Text/-PLU Select ONLY Items whose code is NOT a PLU

ENTERING QUANTITIES

Enter the QUANTITY of the Item being purchased.

Press [ENTER] to use the EXISTING Quantity and go to the "Item" Column of the line below. If NO quantity is entered, it defaults to 1.

You can also SCAN another Item. This does the following:

- 1) Uses a Quantity of 1 for this line.
- 2) Enters the scanned Item on the next line.
- 3) Places you in the "Quantity" Column of the next line.

You can also enter:

- 0 Remove the Item from the sale
- + Have the scale return the Item's Weight (Random Weights ONLY)
- C Case Pricing. See Below
- P Apply a Coupon. Requires an existing value in the "Qty" Column
- S Specify Singles of Break Pack Items
- T+ Apply the Sales Tax.
- T- Remove the Sales Tax
- Z Display Item Cost. System Constant #160 MUST be set to "Y".

CASE PRICING

- Simple Case Pricing

Indicate the #Cases being purchased followed by a "C". If just a "C" is entered, ONE Case is assumed. Examples: *3C* -> 3 Cases

C -> 1 Case

- Complex Case Pricing

Indicate the #Cases being purchased, followed by a "C" followed by the Qty/Case. In order for Complex Case Pricing to be recognized, Number System Constant #3 (Allow Extended Case Discount Syntax) must be set to "Y". Example: *2C4* -> 2 Cases with 4 Items per Case

ENTERING PRICES

Enter the PRICE to charge for this Item.

Press the [F11] key to use the Calculator.

You can also enter:

- "F" Use the Discounted file price for this Item.
- "FN" Use the Non-Discounted file price for this Item.
- "Z" Display Item Cost. System Constant #160 MUST be set to "Y".
- A number between .01 and 100 to discount the item by the number entered.
Example: 20% or 20P → takes 20% off the Item's Price.
- To make the price eligible for Member Discounts, follow it with a "D".
Example: 9.99D → uses \$9.99 as the base price and applies the Member Discount.
- To Remove all previously applied discounts from this line, enter "0%".

Press [ENTER] or [TAB] to use the EXISTING Price and go to the "Qty" Column.

To price an Item at Cost, enter "COST".

To price an Item at Cost plus a percentage, use "C+" followed by the percentage over cost.

Example: C+10 → prices the Item at cost plus 10%.

When pricing Donations, enter "R" to round the sale price UP to NEXT Dollar. Example: If the sale total was \$9.51, entering "R" to a Donation will use a Price of .49, thus making the sale total an even \$10.00.

Note: Items with a "!" following the price are on sale.

PAYMENT METHOD

Use Arrow keys to navigate fields or press the [F2] key to bring up a box showing all payment methods.

Enter the Amount to apply or enter:

- "." Apply Total Amt Due or remainder if other Payment Methods have applied amts.
- "C" Pay the remaining \$Amount with a Credit Card.
- "CF" Pay what's eligible for EBT with EBT, subtracting Sales Tax from the EBT eligible Items. The remainder is paid with Credit Card. ALL payments made prior to this are ZEROED OUT. "FC" is an equivalent response.
- ".D" Delete the \$Amount in this payment method. Same as entering "0".
- "D" Apply Discounts.
- "F" Pay what's eligible for EBT with EBT and subtract the Sales Tax from the EBT eligible Items.
- "O" Apply Deposits (on Special Orders). "S" Apply or remove ONLY Senior Discounts.
- "T" Make any necessary Sales Tax adjustments.

August 2020

- "Z" Clear ALL Payment information.

In the "Other" Field you can also enter:

- "F*" Return the \$Amount eligible for EBT. You are then placed in the Payment Box to distribute the remainder.
- "G" Apply as a Gift Certificate.

Entering the Check#

Enter the Check NUMBER (usually found on the upper-right) of this Check. Press the [Up Arrow] key to proceed to the Previous prompt. Entering the EBT Subtraction From This Gift Card

Enter the AMOUNT of EBT Eligible Purchases to exempt from this Declining Balance Gift Card subtraction.

Enter "F" to have CoPOS subtract ALL EBT Eligible Items.

Enter "F?" to have CoPOS display ALL EBT Eligible Items.

Entering the IOU Amount

Enter the \$Amount that this Member is paying towards their IOU Balance.

You can also enter:

- "V" View this Member's IOUs.
- "." PAY OFF this Member's IOUs.
- "G" Use this Member's Gift Card Balance to pay towards the IOU Balance.

Help for the Main Choice Bar

The Main Choice Bar directs you to all features available at Enter a Sale.

Tabs available at the Main Choice Bar

- [Member] Lets you specify the Member or Customer who is making this purchase. Both Members and Customers can be looked up by name. Only Members can be identified by Number.
If this is to be a sale to a Non-Member/Non-Customer, simply press [Enter] to indicate a "Non-Member Sale".
If you identify a Member who has an IOU Balance, a notification is made and you will be prompted to pay off the IOU.
If you identify a Member or Customer who has an Internal Gift Card with a Balance, you will be prompted to use it.
If someone presents an Internal Gift Card that has only the Gift Card#, it can be used by entering "G/"+The Gift Card#, for example: G/102.
Finally, if the Member entered has an open Special Order with Items in it, you are alerted to this and prompted to include these in the Sale.

August 2020

- [Payment Method] Lets you specify how the tender amounts are distributed. Payment can be made by:
- 1) Cash
 - 2) Check
 - 3) Credit Card
 - 4) EBT/SNAP
 - 5) Gift Card
- [Discounts] Lets you apply Discounts to this Sale.
For more information see "[Help for the \[F3\] Choice Bar](#)".
- [Other] Lets you perform additional functions.
For more information see "[Help for the \[F4\] Choice Bar](#)".
- [Record Sale] Lets you record the Sale and optionally print a Sales Receipt
- [QUIT] Lets you exit this Option.
Note: If any Items have been entered, you will be prompted for an "OK to Quit".

Help for the F3 Choice Bar

The [Discounts] Choice Bar offers the following choices:

- [Member] Lets you Apply or Remove the Basic Member Discount.
- [Senior] Lets you Apply or Remove the Senior Discount.
- [Adjust] Lets you perform the following tasks as related to Member Discounts:
- [Remove] Remove ALL Discounts from this Sale.
- [Surcharge] Lets you apply the Non-Member Surcharge. This choice requires that a Non-Member Surcharge has been set up, otherwise this choice is "grayed out".
- [WIC] Lets you apply WIC Coupons to this Sale. This choice requires System Constant #32 to be set to "Y", otherwise this choice is "grayed out".
- [Incentive] Lets you take discounts related to FDA Incentive Programs.
An example of such a program is "Double Up Food Bucks". This choice requires an Incentive Program has been set up and System Constant #294 be set to "Y", otherwise this choice is "grayed out".
- [Loyalty] Lets you take discounts based on Loyalty Points accrued. This choice requires that a Loyalty Program be set up and Active. Otherwise, this choice is "grayed out".
Furthermore, the Sale must be to a Member.

Entering Custom Discounts

Enter the Percentage of the Custom Discount that you wish to apply.

Enter "D" to apply this Member's Default Discount.

Enter "0" to remove ALL Discounts while leaving price overrides intact. To figure the Discount that a fixed \$Amount will yield, enter "\$" followed by the \$Amount. Example: \$2 → will figure the percentage Discount that a \$2.00 Discount will yield.

Note: You can subtract (or add) the Employee Discount by entering "+E" (to add) or ("-E") to subtract. The ability to do this is controlled by System Constant #164.

Help for the F4 Choice Bar

This Choice Bar offers the following choices:

[Sp Ord] Lets you perform the following tasks as related to Special Orders:

- 1) Collect a Special Order Deposit From this Member/Customer.
Refund a Special Order Deposit made by this Member/Customer to this Member/Customer.
- 2) Specify which Items that have come in on this Special Order to include in this sale.
- 3) View other Special Orders place by this Member/Customer.

[EBT] Lets you perform the following tasks as related to EBT Pmts:

- 1) View the Items in this sale that are EBT eligible.
- 2) View the Items in this sale that are NOT EBT eligible.
- 3) View the Balance on this Member's/Customer's EBT Card. Both EBT Foodstamps and EBT Cash are shown. This choice is only available if Integrated Credit Card Processing is turned on. (See System Constant #200)

[Tax] Lets you perform the following tasks as related to Sales Tax:

- 1) Apply Sales Tax to all eligible Items. Sales Tax is automatically applied to eligible Items but it is also possible to remove the Sales Tax. See #2.
- 2) Remove Sales Tax from ALL Items. This is usually used when selling to a tax exempt entity.
- 3) Remove Sales Tax from EBT Items. When an EBT payment is tendered, EBT is automatically removed from Items marked as EBT eligible, but there may be Items not marked as EBT eligible for which Sales Tax is to be removed. This task lets you handle this situation.

[Pay Dues] Lets you collect Membership Payments at the Register.

[Pay IOUs] Lets you collect IOU Repayments at the Register.

[Timed Disc] Lets Members elect or decline the use of a once a Month Discount.

Note: This choice is "Greyed Out" when not relevant.

August 2020

- [Gift Card] Lets Internal Gift Card holders elect or decline the use of an Internal Gift Card that has a balance. Like [Timed Disc], this choice is "Greyed Out" when not relevant.
- [Hold] Lets you place a Sale on Hold. This choice is very useful in situations where a Sale can't be completed but will be resumed. Examples of this might be that a customer has left their wallet or mobile phone in their car.

Entering the Payment of Dues or Equity

Enter the Amount being paid towards Member Dues (or Equity).

Note: If your store collects BOTH Member Dues and Equity, payment can be split between them using the "/" with the Equity segment FIRST.

Examples: *50.00/5.00* → applies \$50 toward Equity and \$5 towards Dues.

50.00/ → applies ALL \$50 towards Equity.

/5.00 → applies ALL \$5 towards Dues.

Entering the Line Number That Receives The Coupon

Enter the Line# of the Item to which you wish to apply this Coupon.

To apply a Coupon to the entire Sale, enter ".S", "SALE" or "ALL". If you apply the Coupon to the entire Sale, you will be blocked from entering or editing any Items, so do this as the last step. To clear a Storewide Coupon, simply apply the Storewide Coupon in the same way and you will be prompted to clear the Storewide Coupon. Storewide Coupons can be either an absolute \$Amount off or a Percentage off. Only one Storewide Coupon may be applied to each sale.

Note: Storewide Coupons are treated as Store Coupons.

Entering the Coupon Amount

Enter either the \$Amount of this Coupon or the Percentage Off. To specify the Percentage Off, enter the percent amount to take off, followed by "%" or "P". Example: *30%* or *30P* takes 30% off.

Removing the Coupon

Enter the Line# of the Item from which you wish to remove this Coupon.

Enter "ALL" to remove ALL Coupons.

Entering the #Storewide Coupon Units

Enter the Number of "Units" of this Storewide Coupon to apply.

Entering Storewide Coupon \$Amount

Enter the \$Amt of this Storewide Coupon.

To figure in a percentage follow your response with a "%" or a "P". Example 25% will take 25 percent off the eligible total.

To have the Coupon \$Amount be the entire \$Amount of a particular line enter "L" followed by the Line# you wish to use. You can even specify a percentage of that line by following the line# with "/NN%".

Example: L4/50% → uses 50% of the Items Price of Line 4 as seen in the "Price" column as the Coupon \$Amount.

Entering the Line# for the WIC Coupon

Enter the Line# of the Item to which a WIC Coupon is to be applied.

Enter "*ALL" to apply all eligible lines.

Entering the #WIC Coupons

Enter the NUMBER of WIC Coupons to apply to this Line.

Enter "0" to REMOVE this WIC Coupon.

Enter "*ALL" to apply all of the WIC Coupon to the ALL Items on the line.

Removing WIC Coupons

Enter the Line# of the Item from which this WIC Coupon is to be removed.

Enter "ALL" to remove ALL WIC Coupons.

Entering the Special Order Customer

Enter the NAME of the Customer who has placed this Special Order.

If this Customer has Special Orders with Items that have come in, you will be asked to ring these items up as part of the sale.

Entering the Special Order Deposit

Enter the \$Amount to collect for the Special Order Deposit.

You can also enter:

- "*ALL" to have the \$Amount be the entire Amount that this Member or Customer has remaining on Special Order.
- An Item's Description to look up the Item's price.

Entering the Name of the Customer

Enter the NAME of the Customer from whom you are taking the Deposit.

If the Customer you enter is NOT on file, you will have the chance to ADD the Customer.

Entering the Item to Use to Determine Special Order Deposit

Enter the Item being used to determine the \$Amount of the Special Order Deposit.

Entering the Number of Items Used to Compute Special Order Deposit

Enter the number of Items to use as the basis for computing the Special Order Deposit.

Assigning the Gift Card#

Enter the Gift Card# to be assign to this Member. Enter "*N" to use the NEXT Gift Card#.

Entering the Tax Exempt Organization

Enter the NAME of the Tax Exempt Organization to whom this sale is being made. You MUST enter this name prior to Saving.